



Preliminary Statement

Member No.:

Member Name:

Do any of the following statements apply to your own and current circumstances? **Yes / No**

1. Do you have any definite plans to travel outside of Australia?
2. Have you travelled outside of Australia in the last **21 days**?
3. In the last **21 days** have you experienced any of the following symptoms:

Fever	Yes/No
Flu-like symptoms	Yes/No
Fatigue	Yes/No
Cough	Yes/No
Sore throat	Yes/No
Loss of smell or taste	Yes/No
Shortness of breath	Yes/No
4. In the last **21 days** have you been told to self-isolate?
5. Have you tested positive for COVID-19 in the last **30 days** or are you currently awaiting a test result?
6. Have you tested positive for COVID-19 and since recovered by recording a negative test result less than **30 days** ago?

If you have answered 'No' to all the questions above, please include this Preliminary Statement with your Insurance Application'.

If you have answered "Yes" to the above statement, we are unable to consider your insurance application at this time. If your circumstances change in regard to the statements you have provided, please feel free to reapply.

Signature of member:

Date:



New Application Summary

To be completed by advisers



Group Insurance Services

Send to AIA Australia email:

Plan name:

Member's full name:

Date of birth:

Annual salary:

Default Cover: Reason for underwriting: New member Salary increase Exceed AAL/FUL Outside of eligibility

Plan number: Eligibility Category:

	Existing/AAL Cover	Proposed Cover	Forward Underwriting Limit
Death	<input type="text" value="\$"/>	<input type="text" value="\$"/>	<input type="checkbox"/>
TPD	<input type="text" value="\$"/>	<input type="text" value="\$"/>	<input type="checkbox"/>

Default Cover: Reason for underwriting: New member Salary increase Exceed AAL/FUL Outside of eligibility

Plan number: Eligibility Category:

	Existing/AAL Cover	Proposed Cover	Forward Underwriting Limit
SCI (per month)	<input type="text" value="\$"/>	<input type="text" value="\$"/>	<input type="checkbox"/>

Waiting Period: 30 days 60 days 90 days

Benefit Period: 2 year 5 year to age 65 to age 70

Please find enclosed: Personal statement Comments/Additional notes:

AIA may need to contact the member to clarify information provided in the application. Please indicate if you would not like AIA to contact the member. No, I prefer AIA not contact the member.

Adviser name:

Adviser email:

Adviser phone number:



Short Personal Statement

Death and TPD Cover to \$1,250,000 and/or
Salary Continuance Cover to \$10,000 monthly benefit

Policy Ref No.

If you:

- are aged 55 or older; or
 - require more than \$1,250,000 death and total and permanent disablement insurance cover; or
 - earn over \$160,000 per annum and therefore require more than \$10,000 monthly benefit of salary continuance cover;
- please complete the standard personal statement and members declaration form available at www.aia.com.au

Member ID:

Employer name:

Life Insured (please provide your current details)

Title Mr Mrs Ms Miss Other

Surname

Given name(s) Gender M F

Date of birth

Daytime contact No. Email address

Residential Address

State Postcode Country

Type of Insurance

New Increase Above AAL (please state the full amount of cover including the AAL)

Death & TPD Amount \$

Salary Continuance Amount \$

Salary Continuance only:

Benefit Period 2 years (to age 65 if earlier) 5 years (to age 65 if earlier) To Age 60 To Age 65

Waiting Period 30 days 60 days 90 days Other – please specify days

Personal Questionnaire

Please complete all parts of this Short Personal Statement. If required, please attach any appendices.

1. Are you a permanent resident of Australia? Yes No

2. Occupation Industry

Daily duties at work (including manual work)

Gross annual salary \$ Hours worked per week

3. (a) Height cm (b) Weight kg

... continued

Personal Questionnaire (continued)

4. At the date of this application, are you absent from work or unable to carry out all of the duties of your current or usual occupation on a full time basis, due to an injury or illness (even if you are not currently working on a full time basis or are unemployed)?..... Yes No
5. Have you smoked tobacco or any other substance in the last 12 months?..... Yes No
If 'Yes', please state forms and daily quantities
6. Do you drink more than 20 standard drinks per week? Yes No
7. Do you participate or intend to participate in any of the following:
aviation (other than as a passenger on a recognised airline), football (all codes),
scuba diving (more than 40 metres), motor racing or any other hazardous activity?..... Yes No
8. Have you ever suffered symptoms of, or had, or been told you have or received any advice or treatment for:
• high blood pressure, high cholesterol, heart complaint, chest pain or stroke;
• mental or nervous disorder including stress, anxiety, depression or neurological condition;
• cancer or a tumour of any type;
• back/joint disorder, arthritis, loss of limb or paralysis;
• loss of sight of any eye(s) or blindness;
• kidney, bladder, bowel or stomach disorder and or disease;
• diabetes or liver disease (including hepatitis)? Yes No
9. Have you ever:
• suffered from AIDS or been infected with the HIV virus; or
• used or injected yourself with any illicit drugs not prescribed by a medical practitioner; or
• engaged in male-to-male anal sexual activity? Yes No

If you answered 'Yes' to any of questions 4 to 9 above, please complete the standard personal statement and members declaration form available at www.aia.com.au

Declaration and Agreement

Insured's duty of disclosure

A person who enters into a life insurance contract in respect of your life has a duty, before entering into the contract, to tell us anything that he or she knows, or could reasonably be expected to know, which may affect our decision to provide the insurance and on what terms.

The person entering into the contract has this duty until we agree to provide the insurance. The person entering into the contract has the same duty before he or she extends, varies or reinstates the contract.

The person entering into the contract does not need to tell us anything that:

- reduces the risk we insure you for; or
- is common knowledge; or
- we know or should know as an insurer; or
- we waive your duty to tell us about.

If you do not tell us something that you know, or could reasonably be expected to know, which may affect our decision to provide the insurance and on what terms, this may be treated as a failure by the person entering into the contract to tell us something that he or she must tell us.

If the person entering the contract does not tell us something

In exercising the following rights, we may consider whether different types of cover can constitute separate contracts of life insurance. If they do, we may apply the following rights separately to each type of cover.

If the person entering into the contract does not tell us anything he or she is required to, and we would not have provided the insurance if he or she had told us, we may avoid the contract within 3 years of entering into it.

If we choose not to avoid the contract, we may, at any time, reduce the amount of insurance provided. This would be worked out using a formula that takes into account the premium that would have been payable if he or she had told us everything he or she should have. However, if the contract has a surrender value, or provides cover on death, we may only exercise this right within 3 years of entering into the contract.

If we choose not to avoid the contract or reduce the amount of insurance provided, we may, at any time vary the contract in a way that places us in the same position we would have been in if he or she had told us everything he or she should have. However, this right does not apply if the contract has a surrender value or provides cover on death.

If the failure to tell us is fraudulent, we may refuse to pay a claim and treat the contract as if it never existed.

Declaration

I have read and consent to the handling, collection, use and disclosure of my personal and sensitive information in the manner described in the Privacy section of this form and the Privacy Policy on the AIA Australia website www.aia.com.au as updated from time to time, including (without limitation) for the purposes of investigation, assessment and management of my claim and related purposes, and the collection and exchange of my personal and sensitive information from and with the following (where relevant):

- a. the life insured, policy owner or beneficiaries of my insurance policy;
 - b. my representatives (including my financial adviser), employer and financial institution;
 - c. other insurers (including workers' compensation insurers), insurance brokers and intermediaries and insurance and credit reference agencies;
 - d. medical and health providers, including the ambulance service;
 - e. AIA Australia's investigators, service providers, partners and reinsurers;
 - f. regulatory and law enforcement agencies;
 - g. the trustee and administrator of my superannuation fund; and
- other third parties assisting with the investigation, assessment and management of my claim.

Signature of Life Insured

Date

This section summarises key information in the AIA Australia Privacy Policy, which may be updated from time to time. For further information, please review the most up to date full version of the AIA Australia Privacy Policy on AIA Australia's website at www.aia.com.au.

AIA Australia Limited is part of the AIA Group. Your privacy is important to us and AIA Australia Limited is bound by the privacy principles which apply to private sector organisations under the Privacy Act, and other laws which protect your privacy. AIA Australia Limited, AIA Financial Services Limited, AIA Group and their related bodies corporate and joint venture partners (together referred to as "AIA Australia", "we", "us" and "our") provide you the following notification and information about our Privacy Policy and your rights.

Why we collect personal information

We collect, use and disclose personal information (including sensitive information) for purposes set out in our Privacy Policy, including to process your applications, enquiries and requests in relation to insurance and other products, for underwriting and reinsurance purposes, to administer, assess and manage your insurance and other products, including claims, and to provide, manage and improve our products and services. We may not be able to do these things without your personal information. We may also collect, use and disclose personal information to understand your needs, interests and behaviour, personalise our dealings with you, to verify your identity, authority to act on behalf of a customer and personal information, maintain and update our records, manage our relationship with you, comply with local and foreign laws and regulatory requests, detect, manage and deal with improper conduct and commercial risks and for reporting and research purposes. Where you agree or we are otherwise permitted by law, we may also notify you of offers and other information about products or services we think may interest you. If you do not wish to receive these direct marketing communications, you may indicate this where prompted or by contacting us as set out in our Privacy Policy.

How we collect, use and disclose personal information

We may collect your personal information from various sources including forms you submit and our records about your use of our products and services and dealings with us, including any telephone, email and online interactions. We may also collect your information from public sources, social media and from the parties described in our Privacy Policy. We are required or authorised to collect personal information under various laws including the Life Insurance Act, Insurance Contracts Act, Corporations Act and other laws set out in our Privacy Policy. Where you provide us with personal information about someone else, you must have their consent to provide their personal information to us in the manner described in our Privacy Policy.

We may collect your personal information from, and exchange your personal information with, our affiliates and third parties, including the life insured, policy owner or beneficiaries of your insurance policy, our service providers, your representatives (including your financial adviser), the trustee and administrator of a superannuation fund, your employer or bank, health providers, partners used in our activities or business initiatives, reinsurers, insurance brokers and intermediaries, regulatory and law enforcement agencies, and other parties as described in our Privacy Policy. Parties to whom we disclose personal information may be located in Australia, South Africa, the US, Europe, Asia and other countries including those set out in our Privacy Policy and you acknowledge that Australian Privacy Principle 8.1 (which relates to cross-border disclosures) will not apply to the disclosure, we will not be accountable for those overseas parties under the Privacy Act and you may not be able to seek redress under the Privacy Act.

Where we provide your personal information to a third party, the third party may collect, use and disclose your personal information in accordance with their own privacy policy and procedures. These may be different to those of AIA Australia.

Other important information

By providing information to us or your adviser (and the licensed dealer or broker they represent), the trustee or administrator of a superannuation fund, or other representative or intermediary, submitting or continuing with a form or claim, or otherwise interacting or continuing your relationship with us, you confirm that you agree and consent to the collection, use (including holding and storage), disclosure and handling of personal information (including sensitive information) in the manner described in the most up to date version of our Privacy Policy on our website and that you have been notified of the matters set out in the AIA Australia Privacy Policy before providing personal information to us. You agree that we may not issue a separate notice each time personal information is collected.

You must obtain and read the most up to date version of the AIA Australia Privacy Policy from our website at www.aia.com.au or by contacting us on 1800 333 613 to obtain a copy. You have the right to access the personal information we hold about you, and can request the correction of your personal data if it is inaccurate, incomplete or out of date. Requests for access or correction can be directed to us using the details in the 'Contact us' section below. Our Privacy Policy provides more detail about our collection, use (including handling and storage), disclosure of personal information and how you can access and correct your personal information, make a privacy related complaint and how we will deal with that complaint, and your opt-out rights.

For the avoidance of doubt, the Privacy Policy applicable to the management and handling of personal information will be the most current version published at www.aia.com.au shall supersede and replace all previous Privacy Policies and/or Privacy Statements and privacy summaries that you may receive or access, including but not limited to those contained in or referred to in any telephone recordings and calls, applications, underwriting and claim forms, Product Disclosure Statements and other insurance and disclosure statements and documentation.

Contact us

If you have any questions or concerns about your personal information, please contact us as set out below:

The Compliance Manager
AIA Australia Limited
PO Box 6111
Melbourne VIC 3004
Phone 1800 333 613