

Document Checklist For Application As General Insurance Agent / Financial Advisor (FA)



Agency / Financial Advisor (FA) Name

Servicing Marketer

	No.	Item (Please provide a copy of the following unless stated otherwise)	Agent 1st Principal	Agent 2nd Principal	FA	Submission (Yes/No)
Applicant / Corporate Nominee	1.	MII PCEIA certificate or other equivalent certificate	√			
	2.	NRIC	√	√	√	
	3.	SPM / MCE certificate or other equivalent certificate	√			
	4.	Original Declaration by Applicant / Corporate Nominee (item 16)	√	√		
Agency/ FA	5.	Original Agency Application Form	√	√	√	
	6.	License from Bank Negara Malaysia			√	
	7.	Business Registration Certificate (only for Sabah & Sarawak) / Borang A & D (only for Peninsular Malaysia)	√		√	
	8.	Form 9*	√		√	
	9.	Form 13*/Section 28* (If there is change of agency name)	√		√	
	10.	Form 24*/Section 58*	√		√	
	11.	Form 32A*/Section 51* (If there is transfer of shares)	√		√	
	12.	Form 49*/Section 58*	√		√	
	13.	Licensed issued by Ministry of Tourism (only for Travel Agent)	√			

	No.	Item (Please provide a copy of the following unless stated otherwise)	Agent 1st Principal	Agent 2nd Principal	FA	Submission (Yes/No)
Agency/ FA	14.	PIAM processing fee	√	√		
	15.	Original General Insurance Agency Agreement/FA duly signed (in 2 sets)	√	√	√	
	16.	Authorized signatory's NRIC	√	√	√	
	17.	Original authorization form to register for payment by Direct Credit to Bank Account (DCBA form)	√	√	√	
	18.	Cheque book cover/ top portion of bank statement / relevant page of the bank account for DCBA purposes	√	√	√	

*Applicable for Company only

Head Office Use Only

1. Screening Result (RAM Credit Info)	
2. PIAM Approval	
3. PIAM E-Identification	
4. Letter of Appointment as An Agent	

Contact Us

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