

Corporate Solutions

Overseas Membership Questionnaire



Please answer the below questions when seeking approval under a Group Policy to cover staff members who are based offshore.

The information requested in this questionnaire is required to ensure AIA New Zealand can offer effective cover to staff based offshore. AIA New Zealand is only licensed to operate in New Zealand and AIA New Zealand therefore requires accurate information about staff members based offshore to determine whether cover can be offered to those staff.

1. Who is the the current (or proposed) policyholder?
Please provide the full legal entity name of the policyholder and the name of the country the policyholder is registered in.

Full legal entity name	
Country of registration	

2. What type of cover is (or will be) provided to members under the policy?

3. Will cover be provided continuously during the duration of the policy or is the cover for a shorter term?

Continuously Shorter term

4. Please provide the following details about the number of members under the policy:

a) How many staff based offshore are to be covered by the policy?

b) How many staff in total are covered by the policy (including in New Zealand and offshore)?

5. Are the offshore staff employed by the Policyholder, or a different entity?
(i.e. does a current employment agreement or contract exist between the policyholder and each offshore staff member, or has the employment agreement or contract been entered into by a different legal entity)

Yes, all offshore staff are employed by the Policyholder. No, some or all of the offshore staff are employed a different entity.

6. Has all activity in connection with the sale and distribution of the policy occurred within New Zealand?

Yes No If "No", please specify the country or countries that activity occurred in:

7. In which country will administration of the policy be handled?

8. In which country will billing and claims under the policy be handled?

9. How will a benefit pay-out be made? (i.e.: will a benefit be paid to the policyholder, or to the member/beneficiary directly)?

10. In the table on the following page, please provide the following details for each offshore staff member to which this application relates:

- What is the employment status of each offshore staff member (e.g. full time employee, fixed term employee, contractor?)
- How long will each offshore staff member be based offshore? (e.g. are they permanently based offshore or based offshore for a fixed period)
- If your answer to Question 6 is 'No', please provide the full legal name of the employing entity for each offshore staff member to which this application relates, and the country which that employing entity is registered in.
- What is the citizenship/residency status of each offshore staff member within the country in which that member is working? (For example, is the member a local citizen of the offshore country which they are working in?)

