

How does a customer do a CKA? (Online method)

Visit www.avivadirect.sg website

Visit the website through email link or through link written on letter.

Select the Investment Page Tab

Log-in to account and do the assessment

Customer Knowledge Assessment

There are 3 criteria for this assessment. You will need to answer what type of educational knowledge and experience you have on investments.

Result of Assessment

After answering the question, you will be assessed based on your answer and the results of the assessment will be shown immediately.

Customer support from Aviva Direct

If you have pass the assessment, you can continue to trade on your own or you can choose advisory help to assist you with your investments.
If you fail, our customer support executives will email you and arrange a date and time for you to meet-up with an Aviva Advisor for investment assistance.

How does a customer do a CKA? (Offline method)

Complete Hard Copy of Customer Knowledge Assessment

Assessment questionnaire is sent through email in the form of a pdf. file, print and complete the assessment.



Scan hard copy of completed form and email to Aviva Direct mailbox

There are 4 parts to the assessment. Ensure all the parts are completed and both sides of the form is scanned and emailed back to Aviva Direct.



Acknowledgement of Assessment

Aviva Direct will acknowledge email once it has been received and assessment status will be updated.



Result of Assessment

If you have pass the assessment, you can continue to trade on your own or you can choose advisory help to assist you with your investments.
If you fail, our customer support executives will email you and arrange a date and time for you to meet-up with an Aviva Advisor for investment assistance.



Customer support from Aviva Direct

Aviva Direct will assist to arrange a suitable time and date for your investment review with an Aviva Advisor.