



Fund Switching/Redirection Form

Only a correctly completed original form is considered a valid request. The request which is deemed irrevocable will not take effect until approved by HSBC. You should read the fund summary before deciding whether to buy or switch to a new fund. A copy of the fund summary can be obtained from your financial adviser or HSBC.

Please note that only the HSBC-Link Ethical series of Investment Linked Funds are fully Shariah compliant. If you invest in the HSBC-Link Ethical series of Investment Linked Funds via Non-Takaful basic plans, your investment will not be considered a fully Shariah compliant.

Policy no.	
Adviser's no.	
Adviser's name	

Name of policyholder:	NRIC no.:	Contact no.:
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Fund Switching - Request to switch the value of units credited to this policy as indicated below:					
Name of fund (Source fund)	Code	Amount to be switched (\$ / %)	Name of fund (Target fund)	Code	Share (only in %)
HSBC-Link Asia Balanced Fund ¹	ABFS ¹		Applicable for Cash/Cheque/SRS		
HSBC-Link Asian Bond Fund ¹	ASBS ¹		HSBC-Link Asia Balanced Fund ¹	ABFS ¹	
HSBC-Link Asia Equity Fund	KMF1		HSBC-Link Asian Bond Fund ¹	ASBS ¹	
HSBC-Link Asian Dividend Equity Fund ¹	ADFS ¹		HSBC-Link Asian Dividend Equity Fund ¹	ADFS ¹	
HSBC-Link China Balanced Fund ¹	CBFS ¹		HSBC-Link China Balanced Fund ¹	CBFS ¹	
HSBC-Link China Equity Fund	CGFS		HSBC-Link Climate Change Equity Fund ¹	CCES ¹	
HSBC-Link Climate Change Equity Fund ¹	CCES ¹		HSBC-Link Emerging Europe Equity Fund ¹	EEES ¹	
HSBC-Link Commodity Fund	COMS		HSBC-Link Emerging Markets Equity Fund	EMFS	
HSBC-Link Emerging Europe Equity Fund ¹	EEES ¹		HSBC-Link Europe Equity Fund	EGFS	
HSBC-Link Emerging Markets Equity Fund	EMFS		HSBC-Link GEM Balanced Fund ¹	GEFS ¹	
HSBC-Link Europe Equity Fund	EGFS		HSBC-Link Japan Equity Fund	JGFS	
HSBC-Link GEM Balanced Fund ¹	GEFS ¹		HSBC-Link Premium Property Equity Fund ¹	PPFS ¹	
HSBC-Link Global Bond Fund	GBOS		HSBC-Link SGD Reserve Fund	SRFS	
HSBC-Link Global Equity Fund	GEQS		HSBC-Link Singapore Balanced Fund ¹	SBFS ¹	
HSBC-Link India Equity Fund	IGFS		HSBC-Link World Selection 1 Fund ³	WSF1 ³	
HSBC-Link Japan Equity Fund	JGFS		HSBC-Link World Selection 3 Fund ³	WSF3 ³	
HSBC-Link Premium Balanced Fund	KBFS		HSBC-Link World Selection 5 Fund ³	WSF5 ³	
HSBC-Link Premium Property Equity Fund ¹	PPFS ¹		HSBC-Link Asia Equity Fund	KMF1	
HSBC-Link SGD Reserve Fund	SRFS		HSBC-Link Ethical Asia Equity Fund ²	TAPF ²	
HSBC-Link Singapore Balanced Fund ¹	SBFS ¹		HSBC-Link Ethical Capital Protected Fund ²	TSFS ²	
HSBC-Link Singapore Bond Fund	KLBS		Applicable for Cash/Cheque/SRS/CPF-OA		
HSBC-Link Pacific Equity Fund	PEQF		HSBC-Link China Equity Fund	CGFS	
HSBC-Link World Selection 1 Fund ³	WSF1 ³		HSBC-Link Global Equity Fund	GEQS	
HSBC-Link World Selection 3 Fund ³	WSF3 ³		HSBC-Link India Equity Fund	IGFS	
HSBC-Link World Selection 5 Fund ³	WSF5 ³		HSBC-Link Pacific Equity Fund	PEQF	
HSBC-Link Ethical Asia Equity Fund ²	TAPF ²		HSBC-Link Ethical Global Equity Fund ²	TMF1 ²	
HSBC-Link Ethical Global Equity Fund ²	TMF1 ²		Applicable for Cash/Cheque/SRS/CPF-OA/CPF-SA		
HSBC-Link Ethical Capital Protected Fund ²	TSFS ²		HSBC-Link Global Bond Fund	GBOS	
			HSBC-Link Premium Balanced Fund	KBFS	
			HSBC-Link Singapore Bond Fund	KLBS	
			Total		100%

Fund Switching/Redirection Form

Fund Redirection - Request to apply future regular premiums to be invested as indicated below:								
Name of fund	Code	Share (%)	Name of fund	Code	Share (%)	Name of fund	Code	Share (%)
Applicable for Cash/Cheque/SRS								
HSBC-Link Asia Balanced Fund ¹	ABFS ¹		HSBC-Link Emerging Markets Equity Fund	EMFS		HSBC-Link Singapore Balanced Fund ¹	SBFS ¹	
HSBC-Link Asian Bond Fund ¹	ASBS ¹		HSBC-Link Europe Equity Fund	EGFS		HSBC-Link World Selection 1 Fund ³	WSF1 ³	
HSBC-Link Asian Dividend Equity Fund ¹	ADFS ¹		HSBC-Link GEM Balanced Fund ¹	GEFS ¹		HSBC-Link World Selection 3 Fund ³	WSF3 ³	
HSBC-Link China Balanced Fund ¹	CBFS ¹		HSBC-Link Japan Equity Fund	JGFS		HSBC-Link World Selection 5 Fund ³	WSF5 ³	
HSBC-Link Climate Change Equity Fund ¹	CCES ¹		HSBC-Link Premium Property Equity Fund ¹	PPFS ¹		HSBC-Link Asia Equity Fund	KMF1	
HSBC-Link Emerging Europe Equity Fund ¹	EEES ¹		HSBC-Link SGD Reserve Fund	SRFS		HSBC-Link Ethical Capital Protected Fund ²	TSFS ²	
						HSBC-Link Ethical Asia Equity Fund ²	TAPF ²	
Applicable for Cash/Cheque/SRS/CPF-OA								
HSBC-Link Global Equity Fund	GEQS		HSBC-Link India Equity Fund	IGFS		HSBC-Link Ethical Global Equity Fund ²	TMF1 ²	
HSBC-Link China Equity Fund	CGFS		HSBC-Link Pacific Equity Fund	PEQF				
Applicable for Cash/Cheque/SRS/CPF-OA/CPF-SA								
HSBC-Link Global Bond Fund	GBOS		HSBC-Link Premium Balanced Fund	KBFS		HSBC-Link Singapore Bond Fund	KLBS	
							Total	100%

Important notes:

- i) The original form must reach HSBC by 3:30pm on each business day (Mon – Fri) in order for the units to be priced on the next valuation date after approval.
- ii) The amount to be switched for each fund named must be at least \$1000, in multiples of \$10 and the remaining units in each fund must be at least \$500.
- iii) The request for fund redirection for a regular premium policy must reach HSBC at least 10 working days before the next regular premium due date.
- iv) If you are switching units or redirecting premiums to 2 or more funds, the percentage share for each destination fund must be at least 10% and in multiples of 5%.

¹ HSBC-Link Asian Dividend Equity Fund (ADFS), HSBC-Link China Balanced Fund (CBFS), HSBC-Link GEM Balanced Fund (GEFS), HSBC-Link Singapore Balanced Fund (SBFS), HSBC-Link Link Asian Bond Fund (ASBS), HSBC-Link Climate Change Equity Fund (CCES), HSBC-Link Emerging Europe Equity Fund (EEES), HSBC-Link Asia Balanced Fund (ABFS) and HSBC-Link Premium Property Equity Fund (PPFS) are applicable for Growth Cultivator, Growth Manager, Growth Manager Plus, Life Manager, Life Manager Plus, Asset Manager I, Asset Manager II, Accumulation Manager and Savings Manager.

² HSBC-Link Ethical Asia Equity Fund (TAPF), HSBC-Link Ethical Global Equity Fund (TMF1) and HSBC-Link Ethical Capital Protected Fund (TSFS) for Takaful plans, Growth Cultivator, Life Manager Plus and Savings Manager and Asset Manager II.

⁴ HSBC-Link World Selection 1 Fund, HSBC-Link World Selection 3 Fund and HSBC-Link World Selection 5 Fund are only available to products distributed by our Financial Consultants from The Hongkong and Shanghai Banking Corporation Limited and HSBC Insurance (Singapore) Pte. Limited. They are currently not available to products distributed by our Independent Financial Advisers.

Signature of policyowner/trustees/assignee _____

Date (dd/mm/yy) _____

For Takaful policy, please read "certificate" for policy, "certificate holder" for policyowner, "wakil" for adviser, "participant" for life insured, "takaful benefit" for sum insured.