

Maturity Instruction Form

NOTE: PLEASE SUBMIT A COPY OF YOUR NRIC / PASSPORT WITH THIS FORM

Full Name of Policyowner / Trustee / Assignee	Policy no.	
	NRIC / Passport no.*	
Email Address*	Contact no.*	(+) Country/Region Code

Electronic (e)-Statement Service*

Opt in (Yes, I would like to receive e-statement) Opt out (No, I prefer to receive hardcopy)

1) Unless you opt-out, you will automatically be enrolled into the e-statement service if you have an email address registered with us.
 2) Should you still prefer to receive paper statement to your mailing address, you can select opt out from e-Statement.
 3) The e-Statement Service is currently available for all policy statements – Annual, Bonus and Monthly Statements.
 4) We will notify you of any changes to your e-Statement option.

For Takaful policy, please read “certificate” for policy, “certificate holder” for policyowner, “Wakil” for Financial Planner, “participant” for life insured, “takaful benefit” for sum insured.

Consent to use of personal data
 I understand that HSBC’s Data Privacy Policy (which may be found at <https://www.insurance.hsbc.com.sg/privacy-and-security/>) forms a part of the terms and conditions governing my relationship with HSBC. I consent to the collection, use and disclosure of my personal data for the purposes set out in the Data Privacy Policy.

PART A: RETAINED UNITS

This option is only applicable to the following basic plans:

- i) Pengurus Simparan Takaful
- ii) Savings Manager
- iii) Takaful Warisan
- iv) Takaful Anugerah
- v) Life Manager (Plus)
- vi) Accumulation Manager

- I do not wish to realise the units in my policy.
 Please continue to deduct the monthly policy fees and investment charge from the existing units.

I understand that the insurance coverage will be terminated on my policy’s maturity date and the value of the fund units in the policy will continue to be invested in their respective fund(s). This value will not earn any interest and will be realised at the bid price on the valuation date following the date we accept your application for partial or full withdrawal.

Note:

- The units will be realised if we do not receive any Maturity Instruction Form **by your policy’s maturity date**.
- The value of fund units:
 - is not protected under Policy Owners’ Protection Scheme; and
 - therefore ranks after policy liabilities^[1] and equally with the unsecured liabilities of the insurer in the event of insolvency of the insurer

^[1] Policy liabilities are obligations under in-force policies such as death, maturity or surrender benefits.

PART B: POLICY EXTENSION

This option is only applicable to CPF Investment-Linked Insurance Plan where the policy's commencement date is later than **1st January 2001**:

- I wish to continue with my policy and consent to HSBC Life continuing to deduct the monthly policy fees and insurance charges from the existing units.

I understand that my policy will mature at age 80 / 99 ^[1] and I can submit my instruction to HSBC Life to terminate my policy at any time.

^[1] Extension age is 99 for all policies excluding Takaful Asset Manager / Asset Manager, which only extends to age 80

Note:

- The units will be realised if we do not receive any Maturity Instruction Form **by your policy's maturity date**.

PART C: MATURITY PAYMENT OPTION

(Not applicable to policies bought under CPF Investment Scheme and Supplementary Retirement Scheme Accounts)

Please indicate how you wish to receive your payment.

- PayNow ^[1] NRIC No: _____

- Cheque Direct Credit to my bank ^[2] Bank and Account Number: _____

^[1] For payment via PayNow, please note that the payment is capped at SGD 200,000 and your Singapore NRIC number must be linked to a Pay Now account. If the PayNow option is selected, please **submit a copy of your NRIC** for verification purpose.

^[2] For payment via Direct Credit, bank charges, currency exchange and all other incidental costs related to the transfer will be borne by you. Please submit a scan/image of your bank statement, clearly showing your full name, bank account number and bank's logo/emblem for account ownership verification.

Note:

- Payment requests to banks outside of Singapore are subject to HSBC Life's evaluation of applicable cross-border laws and regulations.
- A cheque will be issued and mailed to the address stated on your policy if:
 - We do not receive any Maturity Instruction Form by your policy's maturity date
 - "PayNow" option is selected and
 - you have indicated a mobile number / FIN number **or**
 - we do not receive a valid copy of your NRIC **or**
 - your Singapore NRIC number is not linked to a PayNow account **or**
 - your maturity amount exceeds SGD 200,000
 - "Direct Credit" option is selected and
 - you have indicated a bank account belonging to a third party **or**
 - you have NOT submitted a clear image/ copy of bank statement with all required information in a language we support

PART D: POLICYOWNER/TRUSTEE/ASSIGNEE'S ACKNOWLEDGEMENT

(MANDATORY)

I understand, declare and agree that:

- only an original, duly completed and signed instruction form is considered a valid request. The request is irrevocable once it is received by HSBC Life; and
- my application is subject to the terms and conditions as stated in this form and my policy and is effective only when it has been officially accepted and notified to me by HSBC Life.
- I am in compliance with US laws and regulations and other laws having extra-territorial effect:
 - I am not physically present in the US when executing this policy servicing request;
 - I am aware of and understand the policy servicing restrictions* applicable to any and all persons residing temporarily or permanently in the US; and
 - I will inform HSBC Life should I decide to reside in the US either temporarily or permanently
 - I am aware that the list of policy servicing restrictions can be found at <http://www.insurance.hsbc.com.sg/1/2/sghi/>
- the information provided in this form is correct and complete. By signing below, I authorize HSBC Life to update my particulars in your records with the information provided in this form and disclose the updated information to HSBC Bank (Singapore) Limited to update their records accordingly if I am a customer of HSBC Bank (Singapore) Limited.

Signature of Policyowner / Trustee / Assignee

Date (dd/mm/yyyy)