



HSBC Life (Singapore) Pte. Ltd. (Reg. No. 199903512M)
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Reversionary Bonus Surrender Form

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

* WE WILL UPDATE YOUR PERSONAL PARTICULARS AND CONTACT DETAILS IN OUR RECORDS WITH THE INFORMATION PROVIDED IN THIS FORM. IF WE DO SO, WE WILL NOTIFY YOU.

Full Name of policyowner as shown in NRIC/Passport including alias*	Policy no.	
	NRIC / Passport no.*	
Email Address*	Contact no.*	Country/Region Code (+)
Name and Contact no. of Financial Planner:		
<p>Electronic (e)-Statement Service* <input type="checkbox"/> Opt in (Yes, I would like to receive e-statement) <input type="checkbox"/> Opt out (No, I prefer to receive hardcopy)</p> <p>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.</p>		
<p>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.</p> <p>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.</p>		

Important notes:

- The amount of reversionary bonus earned on the policy anniversary date is dependent on both the basic sum insured of the policy and the accumulated reversionary bonus.
- The reversionary bonus declared at each policy anniversary is on a compounded basis and the full amount will be payable upon death or maturity of the policy, whichever is earlier.
- It is **not advantageous** to withdraw the reversionary bonus on your policy as only the surrender value of the declared bonus is payable.
- Alternatively, you may like to consider taking a policy loan against your policy. This loan shall bear interest at a rate as the company shall from time to time determine. The current rate of interest is 6.5%.
- The amount of reversionary bonus withdrawn for CPFIS policies will be credited to your investment account with the Agent Bank or CPF Special Account.

Accumulated reversionary bonus: _____

Surrender value of reversionary bonus*: _____

I acknowledge that I have read the above and have considered the implications of withdrawing the reversionary bonus. I hereby authorise the company to pay me/credit my investment account with the Agent Bank or CPF Special Account the surrender value of the reversionary bonus*.

I confirm that the information provided in this form is correct and complete. By signing below, I authorize HSBC Life (Singapore) Pte. Ltd. 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.

PAYMENT OPTION (Not applicable for policies bought under CPF Investment Scheme and Supplementary Retirement Scheme Accounts)

Please indicate the option you wish to receive your payment.

- ^ PayNow NRIC Number: _____ ^ Your Singapore NRIC number must be linked to a PayNow account.
- Cheque
- * Direct credit to my bank Bank and Account Number: _____

* If the Direct Credit option is selected, 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.

For payment via Direct Credit:

- the amount you receive may be subject to fees and charges levied by your bank and such fees and charges will be borne by you;
- bank charges, currency exchange and all other incidental costs related to the transfer will be borne by you;
- payment requests to banks outside of Singapore are subject to HSBC Life's evaluation of applicable cross-border laws and regulations.

We will send a cheque to you if:

- 1) "PayNow" option is selected but you indicated a mobile number/ FIN number, or your Singapore NRIC number is not linked to a PayNow account.
- 2) "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 or
 - you have provided a non-Singapore bank account number
- 3) No payment option is selected.

Signature of policyowner/trustee/assignee

Date (dd/mm/yyyy)

The signature(s) of policyowner/trustee/assignee should be signed in the same manner as they appear in our record.