



HSBC Life (Singapore) Pte. Ltd. (Reg. No. 199903512M)

www.hsbclife.com.sg

Customer Care Hotline: +65 6880 4888

Email: e-surance@hsbc.com.sg

Mailing Address: Robinson Road Post Office P.O. BOX 1538 Singapore 903038

## Goal Builder (SGD/USD) ILP Partial Withdrawal 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.*	+ <small>Country/Region code</small>

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.

### CONSENT TO USE OF PERSONAL DATA:

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 your relationship with HSBC. By submitting this form, you consent to the collection, use and disclosure of your personal data for the purposes set out in the Data Privacy Policy.

### US INSURANCE REGULATORY REQUIREMENTS:

Due to US insurance regulatory requirements, you are not to enter the US or any territory subject to US jurisdiction at the time of considering or deciding relevant matters on the insurance product, otherwise the request effected hereunder may be void.

By submitting this form, you confirm that you are in compliance with US laws and regulations and other laws having extra-territorial effect:

- you are not physically present in the US when executing the policy servicing request(s);
- you are aware of and understand the **policy servicing restrictions** applicable to any and all persons residing temporarily or permanently in the US;
- you will inform HSBC Life (Singapore) Pte. Ltd. should you decide to reside in the US either temporarily or permanently;

List of **policy servicing restrictions** is set out in our website <http://www.insurance.hsbc.com.sg/1/2/sghi/customer-service>

## PART A: WHAT YOU SHOULD KNOW ABOUT EARLY WITHDRAWAL/SURRENDER OF YOUR INVESTMENT-LINKED POLICY

### IMPORTANT NOTICE

1. An insurance policy is intended to meet your long-term financial needs. Therefore, it may be disadvantageous for you to partially withdraw or surrender a policy before its maturity date. Some disadvantages are:
  - You are losing valuable benefits from the policy:
    - You are losing the insurance protection offered by your policy;
    - You may not be able to achieve your intended financial objective; and
    - This may result in losing any financial benefit accumulated over the years.
  - It may not be possible for you to obtain a similar level of protection on the same terms in the future.
    - You may not be insurable on standard terms;
    - You may have to pay a higher premium in view of higher age; and
    - Withdrawing/Surrendering your insurance policy and switching to another policy could result in a loss of specific policy features due to changes in age or health.
2. Additional Charges/Fees  
If you withdraw/surrender your investment-linked policy and then buy a new investment-linked policy or other investment product, or top up on another one of your existing investment-linked policies or other investment product, you will incur new charges. These may include:
  - Distribution Fee  
Commission is paid to Financial Consultants on all new insurance policies / investment products.
  - Administration Charge  
There could be an administration charge for each new policy / investment product. The administration charge can be as high as 5% of your investment-linked fund. For example, on a single premium investment of S\$10,000, an administration charge of S\$500 would be deducted.
  - Policy Fee  
A policy fee is usually incurred for each policy.
  - Surrender Penalty  
A surrender penalty will be applicable to your policy if you partially withdraw / surrender your policy during the surrender penalty period. This surrender penalty is a charge and will not be refunded to your policy after the surrender penalty period.

3. Fund Switching Facility

Instead of withdrawing/surrendering your investment-linked policy because the fund you have bought is not meeting your initial or current investment objectives, you may choose to switch to other fund(s) offered by the Company at its unit price without incurring any charges.

4. Other Options

Instead of withdrawing/surrendering your investment-linked policy, you may wish to enquire whether there are other options available under your policy to meet your short term financial needs. Some options are:

- Opt for a premium holiday if your policy has accumulated cash value. This allows you to temporarily stop paying premiums; or
- Reduce the policy's regular premiums (applicable only to regular premiums policies). This allows you to reduce your ongoing financial commitment to the policy.

5. Seeking Advice From Your Financial Consultant

It is important to seek advice from your financial consultant before early partial withdrawal/surrender of your investment-linked policy or other investment product. Your financial consultant can advise you on options other than withdrawing/surrendering the policy, explain the implications of each option, and provide appropriate recommendations to you, taking into account your investment objectives, financial situation and particular needs.

**PART B: POLICYOWNER/TRUSTEE/ASSIGNEE'S ACKNOWLEDGEMENT**

**(MANDATORY)**

☐ I have read and understood the statements in Part A, and am aware that:

- it may be disadvantageous for me to surrender a policy before its maturity date;
- should I wish to buy a similar policy in future I may incur additional charges and I may not be able to secure similar terms and conditions; and
- a surrender penalty may be applicable if I withdraw / surrender the policy, and that this will not be refunded to my policy after the surrender penalty period.

It is highly recommended to approach your Financial Consultant for a review to assess your current financial needs.

**Were you advised by a financial consultant to withdraw/surrender this policy?**

☐ Yes

☐ No

If "yes", please ask your financial consultant to complete **Part C**.

**PART C: FINANCIAL CONSULTANT'S ACKNOWLEDGEMENT**

Name of Financial  
Consultant

Financial  
Consultant's code

I have explained to the above Policyowner / Trustee / Assignee the implications of early surrender of this insurance policy and the alternative options available. I have recommended the surrender of this policy for the following reasons:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Signature of Financial Consultant

\_\_\_\_\_  
Date (dd/mm/yyyy)

#### PART D: PARTIAL WITHDRAWAL

☐ I wish to perform partial withdrawal.

To better understand our policyholders' needs and service experience, we would like to understand your reason(s) for withdrawing / surrendering this policy. **Please tick all applicable.**

- ☐ Product performance is below my expectations.  
If so, do you intend to purchase another insurance plan? ☐ Yes ☐ No
- ☐ I no longer need this plan.
- ☐ Need cash for other financial commitments.
- ☐ I want to withdraw profits from policy to stay in cash.
- ☐ I want to withdraw profits from policy and re-invest in Unit Trust or other investment plans.
- ☐ Lack of suitable underlying funds.
- ☐ I have recently experienced servicing issues with the policy.
- ☐ I want to liquidate my policy because it is not subjected to surrender charge(s) even though I will lose the new bonus units and savings on the lower charges.
- ☐ Others. Please specify \_\_\_\_\_

#### PART E: AUTOMATIC FUND REBALANCING

**Warning: Please note that any existing fund rebalancing arrangement will be terminated upon this partial withdrawal application.**

- Automatic Fund Rebalancing will occur on the policy anniversary and only when the portfolio variance from the pre-specified Regular Premium(s) allocation exceeds 5%.
- This feature is available from the 1st policy anniversary onwards.
- Please refer to your Policy General Provisions for the specific terms and conditions.

☐ Yes (I would like to **activate** Automatic fund rebalancing arrangement)

☐ No (I would like to **cancel** existing Automatic fund rebalancing arrangement)

Note: If you wish to change the Regular Premium(s) allocation percentage, you will need to submit a new premium redirection request.

## PART F-1: PARTIAL WITHDRAWAL FOR LIFE GOAL BUILDER (SGD)

☐ I wish to apply for a partial withdrawal from the investment-linked fund(s) as indicated below:

Name of fund	Code	Amount (\$S)	Please tick accordingly.		
			Withdraw all units	Leave Behind	
				\$S\$500	\$S\$1,000
Schroder Asian Growth Fund	ZSAG		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aberdeen Standard Pacific Equity Fund	ZAPE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FSSA Dividend Advantage Fund	ZFDA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Asia Pacific ex Japan Equity High Dividend	ZHAP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Asia Pacific ex Japan Equity High Dividend	ZHJ2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capital Group New Perspective Fund (LUX)	ZCGN		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock Global Equity Income Fund	ZBGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Global Equity Climate Change	ZHGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AB Sustainable Global Thematic Portfolio	ZASG		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder ISF Global Emerging Market Opportunities	ZSEM		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Franklin U.S. Opportunities Fund	ZFUO		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock European Equity Income Fund	ZBEE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder Singapore Trust	ZSST		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JPMorgan ASEAN Equity Fund	ZJAE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allianz China A-Shares	ZALC		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FSSA Regional China Fund	ZFSR		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Franklin Technology Fund	ZFTF		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allianz Global Artificial Intelligence	ZAGA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Franklin Biotechnology Discovery Fund	ZFBD		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AB International Healthcare Portfolio	ZAIH		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock World Gold Fund	ZBWG		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock Asian Tiger Bond Fund	ZBAT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Global Short Duration Bond	ZHGS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Global High Income Bond Fund	ZHGH		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PIMCO Emerging Markets Bond Fund	ZPEM		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capital Group Global High Income Opportunities (LUX)	ZCGG		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Singapore Dollar Income Bond	ZHSD		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AB American Income Portfolio	ZAAI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock Global High Yield Bond Fund	ZBGH		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Sentier Bridge Fund	ZFSB		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Managed Solutions – Asia Focused Income	ZHMS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock Global Allocations Fund	ZBGA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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Name of fund	Code	Amount (S\$)	Please tick accordingly.		
			Withdraw all units	Leave Behind	
				S\$500	S\$1,000
HSBC Portfolios - World Selection 1	ZHW1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HSBC Portfolios - World Selection 1	ZHW1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HSBC Portfolios - World Selection 2	ZHW2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HSBC Portfolios - World Selection 3	ZHW3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HSBC Portfolios - World Selection 4	ZHW4		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HSBC Portfolios - World Selection 5	ZHW5		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder ISF Emerging Multi-Asset	ZSIE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder ISF Sustainable Multi-Asset Income	ZSIS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PIMCO GIS Income Fund	ZPIF		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Janus Henderson Global Technology Leaders Fund	ZJTL		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Franklin Income Fund	ZFIF		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF – India Equity Fund	ZHIE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#### Important Notes on Partial Withdrawals:

- For partial withdrawal by amount, the withdrawal amount must be at least S\$250, and in multiples of S\$10.
- Withdrawing all units from your fund(s) is only applicable if you invest in more than one fund.
- You must retain a balance of at least **S\$1,000** in your policy if you invest in a **single fund** or at least **S\$500** in each fund if you invest in **more than one fund** through the policy.

## PART F-2: PARTIAL WITHDRAWAL FOR LIFE GOAL BUILDER (USD)

☐ I wish to apply for a partial withdrawal from the investment-linked fund(s) as indicated below:

Name of fund	Code	Amount (US\$)	Please tick accordingly.		
			Withdraw all units	Leave Behind	
				US\$500	US\$1,000
Schroder Asian Growth Fund	YSAG		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aberdeen Standard Pacific Equity Fund	YAPE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FSSA Dividend Advantage Fund	YFDA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Asia Pacific ex Japan Equity High Dividend	YHAP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capital Group New Perspective Fund (LUX)	YCGN		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock Global Equity Income Fund	YBGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Global Equity Climate Change	YHGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AB Sustainable Global Thematic Portfolio	YASG		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder ISF Global Emerging Market Opportunities	YSEM		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Franklin U.S. Opportunities Fund	YFUO		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock European Equity Income Fund	YBEE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder Singapore Trust	YSST		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JPMorgan ASEAN Equity Fund	YJAE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allianz China A-Shares	YALC		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FSSA Regional China Fund	YFSR		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Franklin Technology Fund	YFTF		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allianz Global Artificial Intelligence	YAGA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Franklin Biotechnology Discovery Fund	YFBD		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AB International Healthcare Portfolio	YAIH		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock World Gold Fund	YBWG		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock Asian Tiger Bond Fund	YBAT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Global Short Duration Bond	YHGS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Global High Income Bond Fund	YHGH		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PIMCO Emerging Markets Bond Fund	YPEM		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capital Group Global High Income Opportunities (LUX)	YCGG		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Singapore Dollar Income Bond	YHSD		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AB American Income Portfolio	YAAI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock Global High Yield Bond Fund	YBGH		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF - Managed Solutions – Asia Focused Income	YHMS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock Global Allocations Fund	YBGA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HSBC Portfolios - World Selection 1	YHW1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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Name of fund	Code	Amount (US\$)	Please tick accordingly.		
			Withdraw all units	Leave Behind	
				US\$500	US\$1,000
HSBC Portfolios - World Selection 2	YHW2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HSBC Portfolios - World Selection 3	YHW3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HSBC Portfolios - World Selection 4	YHW4		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HSBC Portfolios - World Selection 5	YHW5		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder ISF Emerging Multi-Asset	YSIE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder ISF Sustainable Multi-Asset Income	YSIS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PIMCO GIS Income Fund	YPIF		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Janus Henderson Global Technology Leaders Fund	YJTL		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Franklin Income Fund	YFIF		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HGIF – India Equity Fund	YHIE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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- For partial withdrawal by amount, the withdrawal amount must be at least US\$250, and in multiples of US\$10.
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- You must retain a balance of at least **US\$1,000** in your policy if you invest in a **single fund** or at least **US\$500** in each fund if you invest in **more than one fund** through the policy.



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## PART G: 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 No.: \_\_\_\_\_      ^ Your Singapore NRIC number must be linked to a PayNow account.  
^ Not applicable to USD pay out policies

☐ Cheque      ☐ \* Direct credit to my bank      Name of Bank: \_\_\_\_\_  
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.

## PART H: POLICYOWNER/TRUSTEE/ASSIGNEE'S DECLARATION AND AUTHORISATION (MANDATORY)

I also understand that:

- only an original, duly completed and signed application form is considered a valid request. The request is irrevocable once it is received by HSBC Life (Singapore) Pte. Ltd.; and
- the original signed application form must reach HSBC Life (Singapore) Pte. Ltd. by 3:30pm on a business day for the request to be processed on the same business day. Units will be sold based on the fund price on the next valuation date.
- if there are any pending unit-linked transaction for this policy (i.e. Top-up, Fund Switch, Withdrawal and Benefits Billing), this application will be processed on the next business day following the completed processing of pending transaction(s);

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.

\_\_\_\_\_  
Signature of policyowner/trustee/assignee

\_\_\_\_\_  
Date (dd/mm/yyyy)