



FOR OFFICE USE ONLY

Received Date:

HSBC Life Ver. 1.0

Investment-Linked Policy Fund Switching Form (FA)

Who can complete this form?

Policyholder or Assignee, whichever is applicable.

3 Simple Steps to file a request

- (1) Read the “Before you proceed” section for some important reminders
- (2) Complete this form
- (3) You can submit this form through any 1 of these channels: (Only an original signed form would be accepted)

a.) By Post to:

Operations Dept.
HSBC Life (Singapore) Pte. Ltd.
Robinson Road Post Office
P.O. Box 1094
Singapore 902144

b.) By Hand to:

- (i) your Financial Planner; or
- (ii) By Email via cc.life@mail.life.hsbc.com.sg

Policy Number			
Name of Policyholder/ Assignee/Trustee		NRIC/FIN/ Passport No.	
Name of Life Assured		NRIC/FIN/ Passport No.	

1. BEFORE YOU PROCEED

I, the Policyholder / Assignee, hereby declare that I understand the risks/benefits of the funds that I will be switching into. I have also read the relevant fund information.
When the form indicates “\$”, it refers to the policy currency i.e. Singapore dollar or US dollar.

2. FUND SWITCH OF EXISTING INVESTMENTS

Switch Out From Fund Name Or Fund Code	Allocation* (%)	Switch In To Fund Name Or Fund Code	Allocation (%)
* The allocation here refers only to the percentage of the fund(s) to be switched out.			100%

Note:

The minimum amount per switch is the **lower of \$1,000.00 or 100% of the fund value** of the sub-fund. After fund switching, the minimum balance of each source and destination sub-fund must be at least 1% of the entire holdings. The maximum number of investment options before and after a switch per policy is capped at 10.

For fund switches – If this application is received by HSBC Life by 2.00pm Monday to Friday (cut-off time excluding public holidays), the transaction will be processed on the current business day. The number of units deducted from the Original Fund shall be determined by the Unit/Bid Price established on the Valuation Day on which the transaction was processed. The number of units credited to the Other Fund shall be purchased and determined in accordance with the provisions of the Policy Contract. Transactions are irrevocable after the cut-off time.

If there are any pending unit-linked transaction for this policy (e.g. Top-Up, Withdrawal, Fund Switch and Benefits Billing), this application will be processed on the next business day following the completed processing of the pending transaction(s).

We accept only 1 request per form. Only 1 transaction will be processed per day for each policy regardless of the number of requests and forms submitted.

3. PREMIUM REDIRECTION

Redirect to target fund names or fund codes	New allocation
TOTAL	100%

Note:

- ✓ For **HSBC Life Dimensions, Inspire Flexi & Inspire Flexi², Inspire FlexiSaver, Inspire FlexiProtector**, HSBC Life Flexi Protector, Pulsar, Polaris, Optimus, future premium will apply to BOTH Regular Premium and Recurring Single Premium (if any).
- ✓ New allocation minimum is at least at 1% per fund.

4. REBALANCING OF ENTIRE 100% OF TOTAL PORTFOLIO

Redirect to target fund names or fund codes	New allocation
TOTAL	100%

Note:

- ✓ For rebalancing, any existing fund(s) that are not indicated in the new allocation will be sold off entirely. For funds that exist in the old and the new allocation, only the net amount will be sold/bought. The switching confirmation will reflect the net transactions only. Eg, if Fund A is originally 12% and in the new allocation it is 10%, only 2% (12%-10%) from Fund A will be sold off. The remaining 10% in Fund A are not affected New allocation minimum is at least at 1% per fund.
- ✓ New allocation minimum is at least 1% per fund.

5. DECLARATION AND AUTHORISATION

1. I hereby declare that the information given in this fundswitch form, to the best of my knowledge, is true and complete and that I have not withheld any relevant information which may affect your acceptance of my above-mentioned request(s).
2. I confirm that the decision to invest into any HSBC Life ILP sub-funds is based solely on my own judgment and I have received and understood the latest version of the Fund Information Booklet/Fund Summary (including the Product Summary, where applicable) and Product Highlights Sheet(s) provided by the Financial Planner before making this decision. I also understand that any past performance is not necessarily indicative of future performance of HSBC Life ILP sub-funds.
3. I accept and agree that if my application is received by HSBC Life by 2.00pm Monday to Friday (cut-off time excluding public holidays), the transaction will be processed on the current business day. The number of units deducted from the Original Fund shall be determined by the Unit/Bid Price established on the Valuation Day on which the transaction was processed. The number of units credited to the Other Fund shall be purchased and determined in accordance with the provisions of the Policy Contract. Transactions are irrevocable after the cut-off time.
4. I accept and agree that if I have any pending unit-linked transaction for this policy (e.g. Top-Up, Withdrawal, Fund Switch and Benefits Billing), this application will be processed on the next business day following the completed processing of the pending transaction(s).
5. I accept and agree that if there are any issues with the written inputs in this fund switching form, there will be delays to the trading as HSBC Life will seek clarification from me and/or the Financial Planner before proceeding. I accept and agree that a new form may be required if the existing one is not clear enough to be accepted by HSBC Life.
6. Declaration on US Persons
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:
 - i. you are not physically present in the US when executing the policy servicing request(s);
 - ii. you are aware of and understand the policy servicing restrictions applicable to any and all persons residing temporarily or permanently in the US;
 - iii. you will inform HSBC Life (Singapore) Pte. Ltd. should you decide to reside in the US either temporarily or permanently.

SIGNATURE*

DATE

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**The signature(s) of Policyholder / Assignee should be signed in the same manner as they appear in our records.*

5. TRACK STATUS OF YOUR REQUEST

If you have any query on your request, please reach us via



Your Financial
Planner



+65 6880 4888



cc.life@mail.life.hsbc.com.sg

HSBC Life is committed to making your service experience as easy and stress-free as possible. Thank you for insuring with us. We are always glad to be of service.