



## HSBC Plan With Us Wealth Promotion: Transfer-in of Unit Trust ("Promotion") Promotional Terms and Conditions

2 January to 31 March 2021

Thank you for choosing to participate in the above Promotion. Please read the Promotional Terms and Conditions (enclosed overleaf) that are applicable to the Promotion.

### CUSTOMER AGREEMENT TO THE TERMS AND CONDITIONS OF THE PROMOTION

I/We have read, understood and agree to the terms and conditions governing HSBC Plan With Us Wealth Promotion: Transfer-in of Unit Trust Promotion.

\_\_\_\_\_  
Name:

\_\_\_\_\_  
Name:

Customer Number:

Customer Number:

Date:

Date:

Deposit Insurance Scheme – Singapore dollar deposits of non-bank depositors are insured by the Singapore Deposit Insurance Corporation, for up to S\$75,000 in aggregate per depositor per Scheme member by law. Foreign currency deposits, dual currency investments, structured deposits and other investment products are not insured.

For Bank Use (once Transfer In is successful)

Verified By

Date

Total investment value transferred in

Reward value



## HSBC Plan With Us Wealth Promotion: Transfer-in of Unit Trust (“Promotion”) Promotional Terms and Conditions

1. This Promotion is valid from 2 January 2021 until 31 March 2021, both dates inclusive (the “**Promotional Period**”) or such other dates as may be determined by HSBC at its discretion.
2. This Promotion is offered to customers of HSBC Bank (Singapore) Limited (“**HSBC**” or the “**Bank**”) who fulfil all the following criteria (“**Eligible Customers**”):
  - a. All main and joint borrowers to activate and utilize HSBC FinConnect via HSBC Singapore App to retrieve data from their HSBC and other banks’ account holdings;
  - b. Customer must complete and submit to their Relationship Managers the HSBC Request for Transfer of Securities/Unit Trust Form their Relationship Managers during the Promotional Period to transfer their existing eligible Unit Trusts from a non-HSBC account to an HSBC investment account (“**Transfer-In**”);
  - c. The transfer-in value of the eligible Unit Trusts is at least SGD20,000 or its foreign currency equivalent. Multiple Transfer-Ins are permitted provided that the collective transfer-in value of the eligible Unit Trusts is at least SGD20,000 or its foreign currency equivalent;
  - d. the Transfer-In is successfully effected, meaning that the eligible Unit Trusts are received into the customer’s HSBC investment account; and
  - e. Customer must sign the Customer Agreement to the Terms and Conditions of the Promotion.
3. For the purposes of this Promotion, eligible Unit Trust means a Unit Trust which HSBC currently has as part of its product range. Customers may contact their Relationship Manager to find out more details about the list of eligible Unit Trusts.
4. Eligible Customers will be entitled to receive cash credits (“**Reward**”) which will be credited into their existing SGD Savings or Current account upon the successful Transfer-In of eligible Unit Trusts in accordance with the below:

<b>Cash Credit Amount</b>
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0.2% of transfer-in value of eligible Unit Trusts, rounded down to the nearest dollar.
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5. The transfer-in value is determined on the date of settlement into the customer’s HSBC investment account.
6. All Unit Trusts held in a currency other than Singapore Dollars (“**SGD**”) will be notionally converted into SGD at HSBC’s prevailing exchange rate for the purposes of determining the transfer-in value under this Promotion. The date of settlement into the HSBC investment account will be used for the purpose of determining the notional conversion rate into SGD for all Unit Trusts held in a currency other than SGD.



7. Fees and charges may apply for Transfer-In. Customers may contact their Relationship Manager to find out more about the applicable fees and charges. Customers are advised to exercise independent judgment with respect to any matter contained herein.
8. Eligible Customers who are joint account holders will receive only one (1) Reward and the Reward will be credited into their joint SGD Savings or Current account.
9. Barring any unforeseen technical delays, fulfillment of the Reward will be done after HSBC determines in its discretion that the criteria under this Promotion have been met and within two (2) months from (i) the end of the Promotional Period or (ii) the date of settlement into the HSBC investment account, whichever is later. Any request for early fulfillment of a Reward will not be granted nor entertained by HSBC.
10. In the event that the Transfer-In request(s) made during the Promotional Period is/are for any reason whatsoever cancelled, rejected or not successfully effected, a customer will no longer be eligible for the Reward even if a subsequent Transfer-In request was successfully effected after the Promotional Period.
11. The Reward is not exchangeable for rewards points, credit or kind in all cases, whether in whole or in part. The Reward is also not transferable or replaceable. We reserve the right, at our discretion, to substitute the Reward with other item(s) of similar value without prior notice.
12. This Promotion is valid with other HSBC Plan With Us offers or promotions unless otherwise stated.
13. Other general terms and conditions governing this Promotion apply. Please refer to the other terms and conditions set out below under the section headed "General Terms and Conditions" for details.

### **General Terms and Conditions**

1. The Bank shall be entitled to a reasonable period of time to process instructions and may not complete the transaction on the same day of receipt of the customer's instruction. The Bank shall not be liable for any loss or damage resulting from any such delay in effecting instructions or transactions.
2. We reserve the right to revise any of these Terms and Conditions (including but not limited to varying the Promotional Period), or withdraw or alter any part of this Promotion at any time without prior notice and/or assuming any liability to any party, and we shall not be liable to pay any compensation or enter into any correspondence in connection with the same.
3. These Promotional Terms and Conditions are governed by the laws of the Republic of Singapore and the parties submit to the non-exclusive jurisdiction of the courts of Singapore.



4. This document shall not, nor shall any part of it, form the basis of, or be relied on in connection with, any transaction whatsoever. The specific financial objectives, personal situation and particular needs of any person have not been taken into consideration. You should therefore not rely on it as advice. You may wish to seek advice from a financial consultant before undertaking any transaction. In the event that you choose not to seek advice from a financial consultant, you should consider whether the transaction in question is suitable for you.