Manulife Financial

FUND SWITCH/PREMIUM REDIRECTION
Policy Number: _____ ("Policy")

Important Notes:

1. This Form must be completed in ink and submitted to Policy Admin by 3 p.m. on a business day to be deemed submitted on that day. If it is submitted after 3 pm, it will be deemed submitted the next business day. Where submission is made via a representative, it is deemed submitted when the representative submits the form to us.
2. If You submit an application to switch Your investment from the target Fund of the first Fund switch to another Fund within the same or before three (3) pm the next Business Day, the Unit Price of the second Fund switch will be calculated two (2) Business Days from the date of calculation of Unit Price of the target Fund of the first Fund switch
3. Signature(s) must be consistent with our records. Names should be written as they appear in our records. Please submit photocopies of NRIC or Passport and deed poll if applicable as documentary evidence if it is different from the name per your NRIC or Passport.

☐ **FUND SWITCH**

I would like to apply for the transfer of the fund(s) as indicated below:

	SWITCH		
	FROM (SOURCE) (Please indicate $ or %)		**TO (TARGET)**
Name of Fund (Please refer to the list of investment funds)	**Amount (S$)**	**% (in whole number)**	**% (in whole number)**
			TOTAL = 100%

Notes applicable for MANULIFE POLICY:

1. The maximum number of funds per policy is 10 except for Fortunate Accumulator or Variable Annuity plans.
2. If a fund is to be fully transferred, please indicate 100% against the switch from (source) column of that fund.
3. The minimum amount to be transferred out of the fund is the lower of S$500 or the entire fund value. This is not applicable to Variable Annuity plans.
4. For Variable Annuity plans, the minimum amount to be transferred out of the fund is the lower of $10,000 of the applicable contract currency or the entire fund value. The amount to be transferred in to each fund must also meet the minimum amount of $10,000 of the applicable contract currency. The remaining fund balance after the fund switch must be at least $10,000 of the applicable contract currency.
5. Fund transfer applies to the existing units and does not affect the allocation of future premiums.
6. The first two fund switches in each policy year are free. Thereafter, the fee for each transfer is S$50. (1 form processed = 1 transfer). Fund switch fee is not applicable for Manulink, Manulink Investor, Manulink Flexi, Manulink Flexi Plus and Fortune Accumulator.

Notes applicable for POLICY ISSUED BY JOHN HANCOCK:

1. The maximum number of funds per policy is 4.
2. If a fund is to be fully transferred, please indicate 100% against the switch from (source) column of that fund.
3. The minimum amount to be transferred out of the fund is the lower of S$1,000 or the entire fund value.
4. Fund transfer applies to the existing units and does not affect the allocation of future premiums.
5. The first two fund switches in each policy year are free. Thereafter, the fee for each transfer is S$25. (1 form processed = 1 transfer).

☐ **PREMIUM REDIRECTION (for regular premium/recurrent single premium)**

I would like all future premiums paid to be allocated as follows:

Name of Fund (Please refer to the list of investment funds)	**% (in whole number)**
	TOTAL = 100%

Notes applicable for MANULIFE POLICY:

1. Premium redirection is not applicable to Variable Annuity plans.
2. Premium redirection does not affect existing units.
3. The minimum fund allocation per fund is 10%.

Notes applicable for POLICY ISSUED BY JOHN HANCOCK:

1. Premium redirection does not affect existing units.
2. The minimum fund application per fund is 20%.

Signature of Assignee/Owner

Name (as per NRIC):
NRIC/Passport No.:
Date: Contact No.:

Representative's Name & Code: Branch:

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