

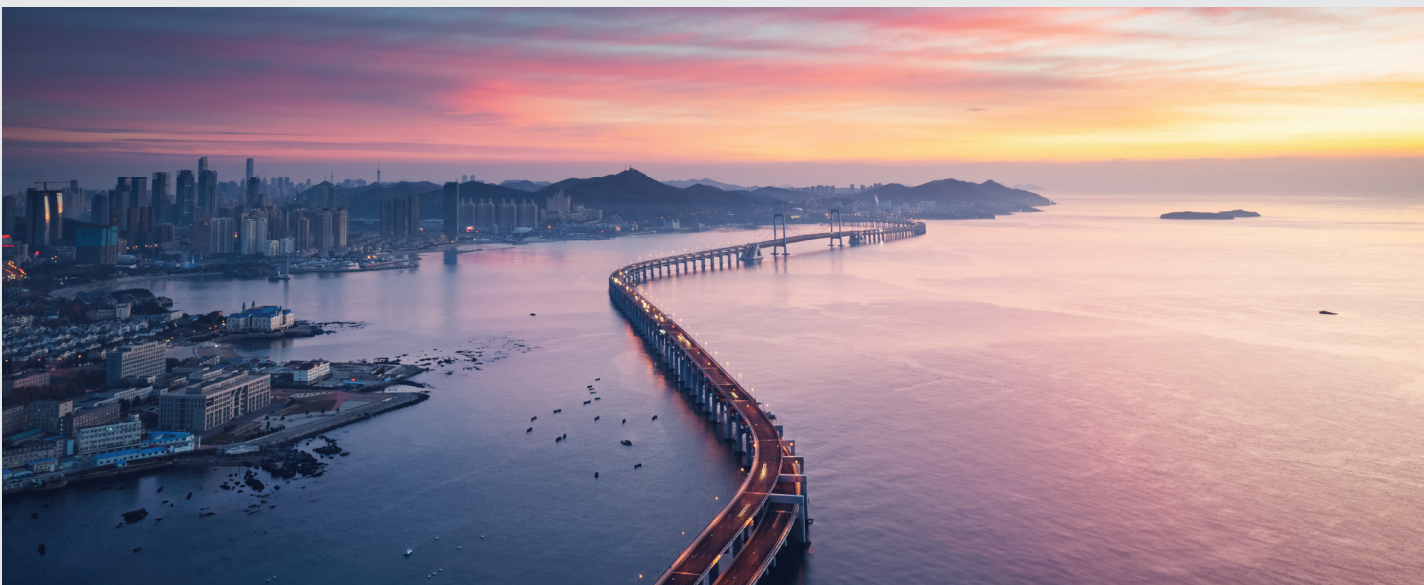
Why stop  
at the city?  
Make the  
world yours.



Wealth Management  
Solutions from **HSBC**







## Because your ambitions don't see boundaries

Your dreams can take you places – beyond your city and around the world.

At HSBC, we've made it our ambition to help you follow yours. So, when you want to chase your goals and build a better life for yourself and your loved ones, you can count on us. Because, boundaries are just a matter of geography – your goals will remain our priority.

### **Wealth Management Solutions from HSBC Premier**

We understand that every individual is different. And so are their dreams, goals and plans for their future. With our personalised suite of Wealth Management Solutions, we're here to take care of your unique financial needs and help you fulfil your ambitions.

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## Get access to exclusive privileges

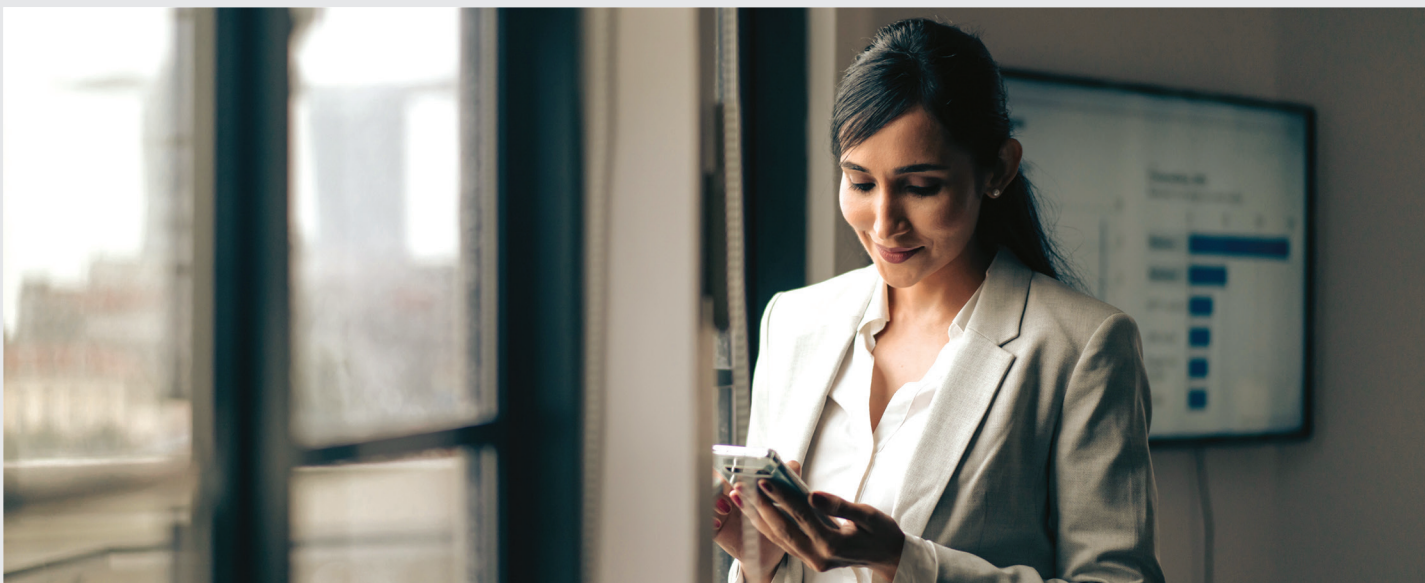
### **Global expertise in wealth management**

#### **Market updates and insights**

- Access to our Wealth Insights Hub to get insights and key takeaways on major market news and access to global research studies on retirement trends, education insights and home ownership
- Make informed investments with our experts' market views from around the world and catch up with the fast-paced FX markets

### **Our approach to Wealth Management Services**

- Personalised financial review to identify any financial gaps and assess your risk capacity to give you suitable solutions
  - Customer satisfaction is a vital parameter to measure the success of a Premier Relationship Manager
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## Our digital solutions, at a glance

'Time is money' – which is why we enable you to bank and invest, anytime, anywhere.

Experience the convenience of accessing and managing your wealth even while you are on the move through our comprehensive digital solutions.

### HSBC Digital Wealth Dashboard

- A unified overview of your holdings with HSBC to track and analyse the performance of your investments with a comprehensive range of wealth planning features, all in a simple-to-use interface
- View the details of your Mutual Fund holdings, Term Deposits, Savings/Current account balances and demat account balance held under the same Customer ID
- Create a watchlist of your chosen Mutual Fund schemes to track their performance
- Assess your risk profile towards investment by answering a set of questions
- Buy, sell and switch Mutual Funds across Asset Management Companies using our digital investing platform
- Disciplined investing options through SIP or STP available at your fingertips

### Wealth Management Account

- Open a Digital Wealth Management Account using the HSBC Online Banking account or the 'HSBC India' Mobile Banking app
- Invest anywhere, anytime – with no need to visit a branch
- Grow your wealth with our wide range of whitelist and non-whitelist funds



Scan the **QR code** to view a quick demo to start your wealth journey.



## Wealth solutions, curated for you

### Investments

#### Mutual Funds

- Reap the benefits of diversification and leverage the power of compounding
- Choose from a range of options to suit your risk tolerance and investment objectives

#### – Mutual Funds Online

Transact in 500+\* Mutual Funds spanning various asset classes on our integrated online platforms

#### Exclusive Premier Wealth Products

- Enjoy a suite of products catered specially for Premier customers, including Bonds and Loan Against Securities

#### Referral service for investing in Portfolio Management Service (PMS) and Alternative Investment Funds (AIFs)

- Choose from a range of asset managers to invest into customised portfolios and AIFs to diversify across asset classes and unique concentrated investment themes

#### Referral services for Retail Trading account on ICICIdirect.com

- Buy and sell securities in the Indian equity markets on ICICI Securities trading platform

#### Bonds

- Gain potentially higher returns compared to cash savings deposits by investing in Bonds of your choice through an 'Execution Only' journey
- Opportunity to receive steady interest income with a potentially higher yield



Scan the **QR code** to learn more about our investment offerings.

### Insurance

#### Life Insurance

- Choose life insurance plans from Canara HSBC Life Insurance ranging from simple term plans to unit linked savings plan to non-linked participating/non-participating savings plan
- Avail tax benefits under section 80C and section 10 (10D), the Income Tax Act, 1961

#### General Insurance

- Choose General Insurance plans from ICICI Lombard General Insurance ranging from motor and travel insurance to health insurance to property insurance\*
- Apply for select products from the comfort of your home or office digitally through the HSBC India website



Scan the **QR code** for more details on insurance.

### Investing Overseas

- For investing your money or just sending funds abroad, use the RBI designated Liberalised Remittance Scheme (LRS) limits
- Remit up to USD 250,000 per individual per financial year under LRS for eligible purposes including diversifying your wealth globally
- Open investment accounts across the globe directly from the convenience of your home country

If you are an HSBC Premier customer, talk to your Relationship Manager or visit your nearest HSBC India branch for more details.





## Not an HSBC customer yet?

Begin your wealth journey with us by opening an HSBC Premier Account. From exclusive privileges to getting the best support for your family. With an HSBC Premier account you can:

- Enjoy HSBC Premier status in 60 countries globally
- Get a dedicated Relationship Manager supported by experienced Service Managers
- Get assistance in international account opening before leaving India through HSBC International Banking Centre
- Enjoy global view and global transfers across all your HSBC accounts worldwide

**To open an HSBC Premier Account, SMS 'SWITCH' to 575750**

or **visit** <https://www.hsbc.co.in/premier/> for more details

Download the 'HSBC India' Mobile Banking app



## Opening up a world of opportunity, for you.

Our purpose – opening up a world of opportunity – drives us in everything we do. We are committed to help you manage, grow and preserve wealth, achieve your goals and build not just a good life but a legacy for your loved ones. Because you deserve the world at your fingertips – not just a city.

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**Disclaimers:**

Purchase of any insurance products by a customer is purely voluntary and is not linked to availing of any other facility from HSBC India.

**BEWARE OF SPURIOUS/FRAUD CALLS!**

IRDAI is not involved in activities like selling insurance policies, announcing bonus or investment of premiums. Public receiving such phone calls are requested to lodge a police complaint.

The Life Insurance products are offered and underwritten by Canara HSBC Life Insurance Company Limited (Insurer) (IRDAI Regn. No. 136) having its head office at 139 P, Sector 44, Gurgaon - 122003, Haryana (India). HSBC India (IRDAI Registration Number: CA0016), having its India corporate office at 52/60, M. G. Road, Fort, Mumbai - 400 001, is the Corporate Agent of the Insurer.

The General Insurance products are offered and underwritten by ICICI Lombard General Insurance Company Limited (IRDA Regn. No. 115) ('Insurer') Registered Office Address: ICICI Lombard House, 414, Veer Savarkar Marg, Prabhadevi, Mumbai - 400 025. HSBC India (IRDAI Regn. No. CA0016) having its India Corporate Office 52/60, M. G. Road, Fort, Mumbai 400 001, is a corporate agent of the Insurer.

The contract of insurance is between the Insurer and the insured and not between HSBC India and the insured. HSBC India does not act as an insurer or underwrite the risks and does not accept any responsibility for any decision made by the Insurer. Settlement of claims is not the obligation of HSBC India.

For more details on risk factors, terms and conditions, please read the sales brochure for the relevant insurance product carefully before concluding a sale.

HSBC India currently offers investment products from third party entities registered and regulated in India.

Mutual fund investments are subject to market risks. Please read the Scheme Information Document (SID), Statement of Additional Information (SAI), Key Information Memorandum (KIM) and addendums, as applicable, issued from time to time, carefully before investing.

HSBC does not distribute or offer through referral investment products to those persons who are either the citizens or residents of United States of America (USA), Canada, Australia or New Zealand or any other jurisdiction where such distribution would be contrary to law or regulation.

PMS and AIF are available to eligible premier customers basis net worth and/or risk profiling assessment. HSBC India only refers you to the AMC for fulfilment of your needs. The decision to offer PMS/AIF to you will be taken independently by the AMC. Please read the PMS/AIF Disclosure Document and proceed only if you agree to the same and independently assess the same to be suitable for you.

The facility to open a trading account is offered by ICICI Securities Limited ('I-Sec') and not by HSBC India. If you are interested in opening a trading account, HSBC India shall refer you to I-Sec and the decision to offer a trading account to you will be independently taken by I-Sec, subject to the terms and conditions stipulated by I-Sec from time to time.

Bonds are offered by HSBC India solely on your request. HSBC India does not provide any advice or recommendation in relation to transactions in Bonds and merely assists you to execute your transaction. Bonds are independently managed by the respective issuer of the Bonds. Please read the offer documents of the Bonds under your consideration carefully before investing.

For Loans against Securities, HSBC India only refers you to HSBC InvestDirect Financial Services Ltd. ('HIFSL') to fulfil your requirements. HSBC India referring you to HIFSL does not constitute investment/lending advice or an offer or a solicitation for an offer to avail financing from HIFSL. The facility is independently offered by HIFSL on such terms and conditions as may be stipulated by HIFSL from time to time. You are advised to read and understand the relevant terms and conditions and obtain appropriate legal, accounting or tax advice where necessary, prior to availing of any facility.