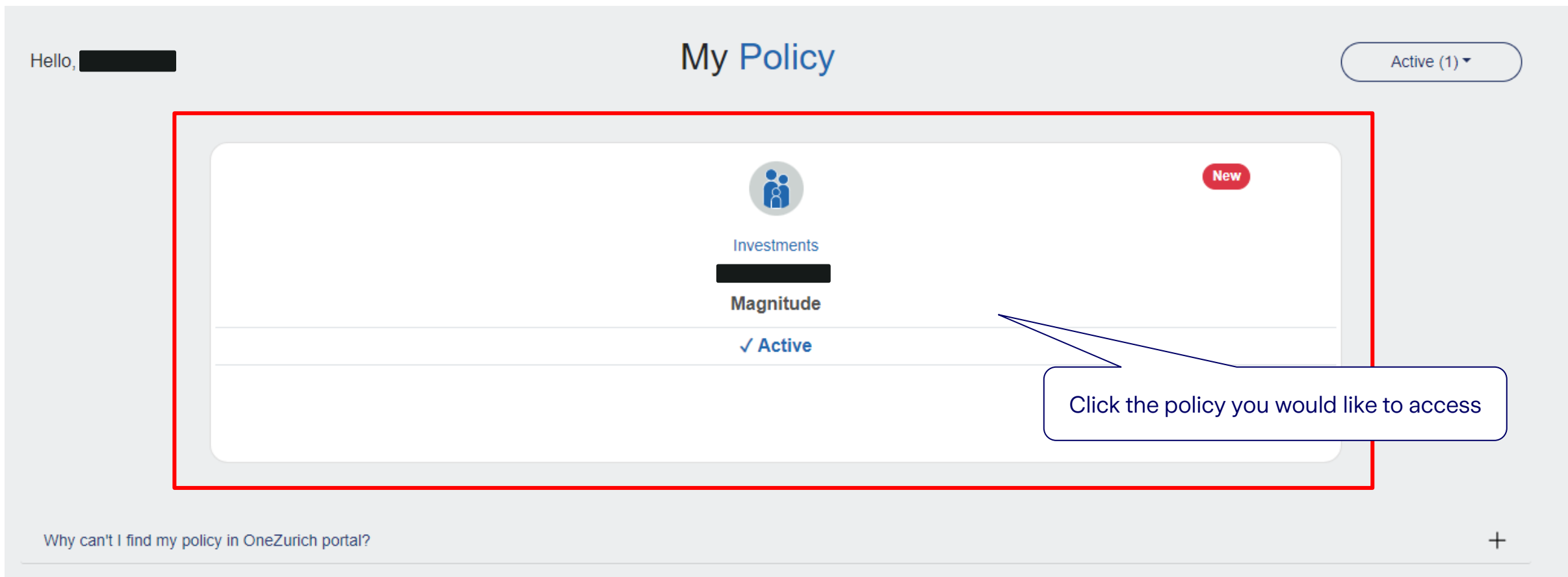


Fund service:

**Change future investment
(Fund redirection)**




Go to 'My Policy'



Hello, [REDACTED]

My Policy

Active (1) ▾

 **Investments**

Magnitude

✓ Active

New

Click the policy you would like to access

Why can't I find my policy in OneZurich portal? [+](#)

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Fund change request



Whole portfolio switching

Change existing funds

Start



Fund to fund switching

Change existing funds

Start



Redirection

Change future investments

Start

Choose 'Redirection' and click 'Start'

Step 1: Adjust the allocation percentage

1

Input

2

Review

3

End

Select the investment choice(s) to which the future contribution will be invested and the percentage(s) of the future contribution which will be invested in the selected investment choice(s).

Allianz Global Investors Fund - Allianz Total Return Asian Equity
(Code: PDUSD, Risk level¹: 5)

Existing allocation : 50%

40

%

1

Barings International Umbrella Fund - Barings Hong Kong China Fund
(Code: MJUSD, Risk level¹: 5)

Existing allocation : 20%

30

%

abrdn SICAV I - Asian Smaller Companies Fund
(Code: S3USD, Risk level¹: 5)

Existing allocation : 20%

10

%

abrdn SICAV I - China A Share Sustainable Equity Fund
(Code: O8USD, Risk level¹: 5)

Existing allocation : 10%

20

%

2

Choose the investment choice(s) for future contribution and adjust the percentage

Total

100

%

Click 'Add' if you wish to change your current investment choice(s)

Reset

+ Add

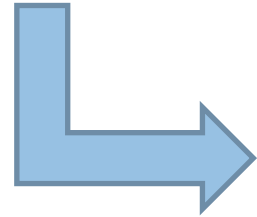
Step 2: Add new investment choice(s)

Code	Investment choice	Risk level ¹	Fund currency	Derivative fund
<input checked="" type="checkbox"/> A3USD	abrdn SICAV I - Climate Transition Bond Fund	2	USD	No
<input type="checkbox"/> A4USD	abrdn SICAV I - Diversif...	3	USD	No
<input type="checkbox"/> A6USD	SIC...			No
<input type="checkbox"/> A8JPY	abrdn SIC...			No
<input type="checkbox"/> A9EUR	Allianz Global Investors Fund - Allianz Emerging Markets SRI Corporate Bond	3	EUR	No
<input type="checkbox"/> AHEUR	BlackRock Global Funds - ESG Multi-Asset Fund	3	EUR	No
<input type="checkbox"/> AJUSD	First Sentier Investors Global Umbrella Fund plc - Stewart Investors Worldwide Leaders Sustainability Fund	4	USD	No
<input type="checkbox"/> AKUSD	Franklin Templeton Investment Funds - Franklin Income Fund	3	USD	No

3a

You could add new investment choice(s) by selecting the item box, then click 'Add'

Add



Existing allocation : 50% %

Existing allocation : 20% %

Existing allocation : 10% %

(Code: O8USD, Risk level¹: 5)

abrdn SICAV I - Climate Transition Bond Fund
(Code: A3USD, Risk level¹: 2) %

Total %

3b

Adjust the allocation percentage of your new investment choice(s)

Step 3: Review your request



Please review your request.

Investment choice	Existing allocation	Allocation %
Allianz Global Investors Fund - Allianz Total Return Asian Equity (Code: PDUSD, Risk level ¹ : 5)	50%	40%
Barings International Umbrella Fund - Barings Hong Kong China Fund (Code: MJUSD, Risk level ¹ : 5)	20%	30%
abrdn SICAV I - Asian Smaller Companies Fund (Code: S3USD, Risk level ¹ : 5)	20%	10%
abrdn SICAV I - China A Share Sustainable Equity Fund (Code: O8USD, Risk level ¹ : 5)	10%	20%
Total		100%

Review your request content, make sure your new allocation aligns with your risk preferences.

Remark(s)

1. Zurich Life Insurance (Hong Kong) Limited assigns the risk level to each investment choice in accordance with several factors such as historical volatility and investment policies of the corresponding underlying fund. Risk level has a scale of 1 to 5. A higher risk level indicates that the return may be relatively more sensitive to changes of market conditions and is more volatile, while a low risk level indicates that the return may be relatively less sensitive to changes of market conditions and is less volatile. However, you should note that the lowest risk level does not mean the investment choice is risk-free. Zurich reviews the risk level at least annually.
2. Corresponding underlying funds of these investment choices are derivative funds where the net derivative exposure may be more than 50% but up to 100% of its net asset value. They may only be suitable for investors who understand the complicated structure of derivative products and their associate risk. You may incur significant loss if you invest in these investment choices. You are strongly advised to exercise caution in relation to these investment choices.
3. Corresponding underlying funds of these investment choices are derivative funds where the net derivative exposure may be exceeding 100% of its net asset value. They may only be suitable for investors who understand the complicated structure of derivative products and their associate risk. Such high leverage exposure of over 100% of the net asset value to derivative may further magnify any potential negative impact of any change in the value of the underlying asset of the underlying fund and also increase the volatility of the underlying fund's price. Therefore, you may incur significant loss if you invest in these investment choices. You are strongly advised to exercise caution in relation to these investment choices.

Note(s)

- i. If there is any instruction in progress for this policy, you may not submit instruction for switching / re-direction of future regular premium allocation.
- ii. For written request that has been submitted to us directly or via licensed insurance intermediary before, please do not re-submit online and vice versa.
- iii. Instruction that submitted after 23:59 (Hong Kong time) will deem to be received on the next working day.
- iv. Instruction for redirection will be effective within 2 working days following the date of our receipt and acceptance of your instruction in normal situation. Redirection will not affect the current allocation of existing investment choice(s). after redirection effective date will follow the new investment strategy. Redirection will not affect the current allocation of existing investment choice(s).



Click 'Submit', or click 'Back' to make changes

Back

Step 4: All set!



Input



Review



End

Your request has been submitted successfully.

Click 'Done' to finish



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← Back to My Policy



You can check the request status at "Transaction record".

Pending online transactions

Request date	Transaction type	Status
Aug 17, 2023	Redirection	Pending