

Register now to view your investment online

More and more customers are already viewing their investments securely online in the same way they view their online banking, so we want to make sure you're not missing out.

Customers who already use Wealth Interactive, our award-winning online service, like the fact that they can:

- ▶ See their latest investment valuation
- ▶ Update their personal details instantly
- ▶ Go paperless to reduce unnecessary admin.

Plus, you can:

- approve transactions that your adviser recommends
- access your policy correspondence quickly and easily from your document library.

You'll be able to access all this information at any time of the day or night, wherever you are, using your computer or tablet.

Make sure you're registered to access this free additional service

To benefit from Wealth Interactive, you need to set up an online service account. Visit

www.quilterinternational.com/wi
select your region and click on
'Register for Wealth Interactive'.



Making changes to your policy can have tax implications for you, or incur charges, so you should always discuss your investment with your financial adviser before making any decisions.

Wealth Interactive is available to access designated Quilter International products, including our portfolio bonds and the Wealth Management Plan in Hong Kong.

Does your policy have multiple policyholders?

Each of you can register to view details of the policy and check its current value. But if you really want to make the most of Wealth Interactive, all the policyholders need to register. You'll need to appoint a lead policyholder who will be able to perform some tasks independently online on behalf of all policyholders.

For example, they will be able to change:

- ▶ policy details
- ▶ assets from which withdrawals and charges are deducted
- ▶ the correspondence address.

However, some transactions such as top ups and withdrawals would require all

policyholders to approve if the lead policyholder is submitting the instruction online themselves. The lead policyholder can be changed at any time.

Are you a corporate policyholder or a trustee?

Trustees and companies will need to identify and appoint a lead policyholder/signatory, who will have sole responsibility for managing the policy online, in conjunction with their adviser.

*Register for Wealth
Interactive now*

Please visit:
www.quilterinternational.com/wi

Your investment may fall or rise in value and you may not get back what you put in.

www.quilterinternational.com

www.quilterinternational.com/hk

Calls may be monitored and recorded for training purposes and to avoid misunderstanding.

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