

One size.
Fits one.



About HSBC

HSBC is one of the world's largest banking and financial service organisations. We serve approximately 39 million customers through our global businesses: Wealth and Personal Banking, Commercial Banking, Global Banking and Markets and Global Private Banking. Our network covers 62 countries and territories in Europe, Asia, the Middle East and Africa, North America and Latin America.

Our purpose – opening up a world of opportunity – explains why we exist. We're here to use our unique expertise, capabilities, breadth and perspectives to open up new kinds of opportunities for our customers. We're bringing together the people, ideas and capital that nurture progress and growth, helping to create a better world – for our customers, our people, our investors, our communities and the planet we all share.



39 million customers throughout the global business - Wealth and Personal Banking, Commercial Banking, Global Banking and Markets, and Global Private Banking.



Our network covers 62 countries and territories in Europe, Asia, the Middle East and Africa, North America and Latin America.



Own your unique blueprint of wealth creation





At HSBC, we understand that goal planning and wealth management are crucial components for achieving your long-term financial goals. We understand that every individual is different and so are their dreams and plans for the future. Therefore, we provide you with a unique financial planning experience tailored around goals specific to your needs. Whether you're just starting your wealth-management journey or building on your existing investments, we are here to support you in achieving your goals.

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.

Need-Based Financial Wellness

- ◆ Personalised financial review to identify any financial gaps and assess your risk capacity to give you suitable solutions.
- ◆ Our team consists of wealth specialists who possess expertise and are equipped to understand your financial gaps and provide you with suitable solutions.
- ◆ Digital first approach enables you to open your wealth management account using internet and mobile banking. Our digital platforms offer real-time access to your investments empowering you to make informed decisions with ease through user-friendly tools.
- ◆ Holistic product suites across investment and insurance to support you in achieving your financial goals covering mutual funds, life insurance, unit linked insurance plan, health insurance, and general insurance from third party product providers.

Our products suited to your life goals

 Protecting my family	<ul style="list-style-type: none"> ✓ Life Insurance ✓ Unit Linked Insurance Plan
 Managing my wealth	<ul style="list-style-type: none"> ✓ Mutual Funds ✓ Guaranteed Life Products ✓ Unit Linked Insurance ✓ Endowment Plan
 Planning for the future (child's education, marriage)	<ul style="list-style-type: none"> ✓ Mutual Funds ✓ Unit Linked Insurance ✓ Endowment Plan
 Planning for retirement	<ul style="list-style-type: none"> ✓ Annuity Insurance ✓ Life Insurance-Whole Life ✓ Unit Linked Insurance ✓ Endowment Plan ✓ Mutual Funds

Empowering your journey with a suite of investment and insurance products

Our personalised investment solutions will take care of your unique financial needs and help you fulfil your ambitions.

Mutual Funds

A list of investment options including whitelist funds. You can also invest in non-whitelist funds, through our online platform.

Life Insurance

A range of life insurance policies that not only help meet your protection needs but also help you with your wealth creation goals for a secure financial future.

- ♦ **Canara HSBC iSelect Guaranteed Future Plan** : A plan that helps you create an alternate source of savings along with the added benefit of protection against the uncertainties of tomorrow.
- ♦ **Canara HSBC iSelect Smart 360 Term Plan** : A highly flexible term plan that you can match to your life stage and needs, with different options for coverage and premium payment uncertainties of tomorrow.

Unit Linked

- ♦ **Canara HSBC Wealth Edge** : A unit-linked individual savings life insurance plan that protects you and your family while helping you generate wealth.
- ♦ **Canara HSBC Insure Smart Plan** : Generate wealth by investing in a mix of debt and equity along with providing life cover.

Annuity Insurance

- ♦ **Canara HSBC Pension4life Plan** : A smart way to ensure a regular guaranteed income stream as per your needs post retirement.

Endowment

- ♦ **Canara HSBC Flexi Edge Plan** : A savings-oriented life insurance plan designed for the important financial milestones in your life.
- ♦ **Canara HSBC Smart Junior Plan** : Guarantee that your child's future education needs are fulfilled, whether you are around or not.
- ♦ **Canara HSBC Smart Future Income Plan** : Offering you a regular stream of monthly income which could be used to supplement your earnings as well as help you plan your retirement.

General Insurance

A suite of insurance products across travel, motor and health insurance to meet all your protection needs.

Property Insurance

- ◆ **ICICI Lombard Bharat Griha Rakha** : A plan that protects you when any unexpected events cause physical loss, damage or destruction of the building of your home, and articles or things in it.
- ◆ **ICICI Lombard Bharat Sookshma Udyam Suraksha** : A plan that covers property relating to your business and protects when any unexpected events cause physical loss, damage or destruction of building and structures, plant and machinery, stock and other assets relating to your business.

Motor Insurance

- ◆ **ICICI Lombard Smart Drive Private Car Insurance Policy** : A policy that covers loss or damage to the vehicle due to various perils. Additionally, it also extends cover towards third party bodily injury and/or death, third party property damages building and structures, plant and machinery, stock and other assets relating to your business.

Health and Medical Insurance

- ◆ **ICICI Lombard Health Shield 360 plan** : A health insurance plan for your family, peace of mind for you. It provides cover for check-ups, surgery and hospital expenses in India and worldwide for the treatment of illness, disease or injury.
- ◆ **ICICI Lombard Smart Super Health Insurance Policy plan** : Offers health insurance with a range of benefits to take care of you and your family's health care needs.

Critical Illness

- ◆ **Canara HSBC Health First Plan** : A fixed benefit health insurance plan that provides you with a lump sum payout on occurrence of heart ailments, cancer conditions and 26 pre-defined major critical illnesses.

Contact us today*

Take control of your financial future and partner with us for all your financial wellbeing and wealth management needs. Our team is ready to help you build a solid financial foundation, navigate market uncertainties, and achieve your long-term goals.

We invite you to explore our range of wealth management services and discover how we can assist you in securing your financial future. Contact us today to schedule a consultation with one of our wealth specialists.

Empowering your wealth, enriching your life.

SMS "PWS" to 575750 or mail us at personalwealth@hsbc.co.in

Terms and Conditions:

*Personal Wealth Solutions are currently available in Delhi, Pune and Bangalore.

The Hongkong and Shanghai Banking Corporation Limited, India (HSBC India) is a distributor of select mutual funds and a referrer of other investment products from third party entities registered and regulated in India. HSBC India does not provide investment advisory services under the Securities and Exchange Board of India (Investment Advisers) Regulations 2013.

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.

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

Insurance is the subject matter of solicitation. HSBC India having its registered office at 52/60, M. G. Road, Fort, Mumbai - 400 001, is the Corporate Agent (Registration No.: CA0016) of Canara HSBC Life Insurance Company Limited (IRDAI Regn.No.136) having its head office at 139P, Sector 44, Gurugram - 122003, Haryana (India), ICICI Lombard General Insurance Company, ICICI Lombard House, 414, Veer Savarkar Marg, Prabhadevi, Mumbai - 400025, IRDA Reg.No.115, Toll Free 1800 2666. Fax No - 022 61961323. CIN (L67200MH2000PLC129408). customersupport@icicilombard.com, www.icicilombard.com. HSBC India does not underwrite the risk or act as an insurer. Purchase of any insurance products by a bank's customer is purely voluntary and is not linked to availment of any other facility from the Bank. The contract of insurance is between the insurer and the insured and not between the Bank and the insured. For more details on risk factors, terms and condition, please read the sales brochure carefully before concluding a sale.

*500+ funds include both Whitelist and Non-Whitelist funds. Whitelist Funds (WL) are mutual funds which have undergone internal assessments by HSBC India and accorded specific Product Risk Ratings. Such funds are offered to customers to invest, both pursuant to investment planning discussions and on a 'Do It Yourself' basis, without any recommendation or advice from HSBC India. Non-Whitelist Funds (NWL) are mutual funds which are available to customers to invest only on a 'Do It Yourself' basis on our online platform, without any recommendation or advice from HSBC India. HSBC India has not accorded specific Product Risk Ratings to these funds.