



Terms and Conditions for Maybank Unit Trust Transfer-In Promotion

1. This Promotion is valid from **01 January 2021 to 30 June 2021** (the “Promotion Period”).
2. Maybank customers who successfully transfer their existing unit trust(s) held with other banks and/or financial institutions to Maybank within the Promotion Period will receive CapitaVouchers worth S\$100 (the “Vouchers”). The minimum value of the unit trust(s) transferred to Maybank by a Maybank customer is S\$50,000. For the purposes of these Terms and Conditions, the Vouchers shall be referred to as the “Gift”.
3. The value of the Gift that an eligible customer is entitled to receive is dependent on the nominal value of each unit trust transferred to Maybank in SGD. The minimum transfer value of the unit trust(s) is S\$50,000. Thereafter, S\$20 worth of Vouchers will be given for every additional S\$10,000 unit trust cash investment transferred to Maybank. For instance, if an additional unit trust amount transferred-in is S\$19,999, then the additional Voucher amount will be S\$20. If an additional unit trust amount transferred-in is US\$19,000, then the additional Voucher amount will be S\$20. There will be no currency conversion. The maximum amount of Vouchers that each customer is entitled to receive is capped at S\$1,500.
4. The redemption form for the Gift will be available for collection within 6 to 8 weeks following the successful transfer-in of the unit trust(s). If the Gift is unclaimed within 6 months after the collection date notified to the customer, then the Gift shall be automatically forfeited.
5. Not all unit trusts can be transferred to Maybank. The unit trust(s) to be transferred to Maybank must be the type of unit trusts which is currently distributed by Maybank and must be cash investment only. Customers should refer to Maybank sales staff to obtain a list of the eligible unit trusts.
6. Customers are required to retain the transferred-in unit trust(s) with Maybank for a minimum period of 3 months, failing which a penalty of 0.4% (based on the value of the unit trust being redeemed/ transferred out of Maybank) will be charged.
7. Customers acknowledge that the time taken to transfer the unit trust(s) is dependent on the processing time of the respective distributor and fund manager of the unit trust(s), which is not within Maybank’s control. Maybank shall not be liable in any way for any loss or damage suffered by the customer or any other person which is caused by or relates to a delay in the transfer of the unit trust(s) or any aspect of this Promotion.
8. Customers shall pay any fees that may be imposed by the distributor or any other party for the transfer of the unit trust(s).
9. Customers who do not have an existing investment account with Maybank will be required to open an investment account before the unit trust(s) can be transferred to Maybank.



10. The terms and conditions set out in Maybank's Investment Services Agreement - Collective Investment Schemes shall apply to the unit trust(s) which are transferred to Maybank.
11. This Promotion is not valid in conjunction with any other promotions offered by Maybank.
12. Maybank reserves the right in its sole and absolute discretion to add, delete and/or vary any of these Terms and Conditions from time to time and to terminate and/or withdraw the Promotion. The terms and conditions stated on the Vouchers apply.