



# FPI Portal Online Switching & Redirection Guide

Welcome to our FPI Portal User Guide for Online Switching & Redirection.

This guide will take you through the end to end process on how to create, review and submit instructions to switch or redirect your funds through FPI Portal.

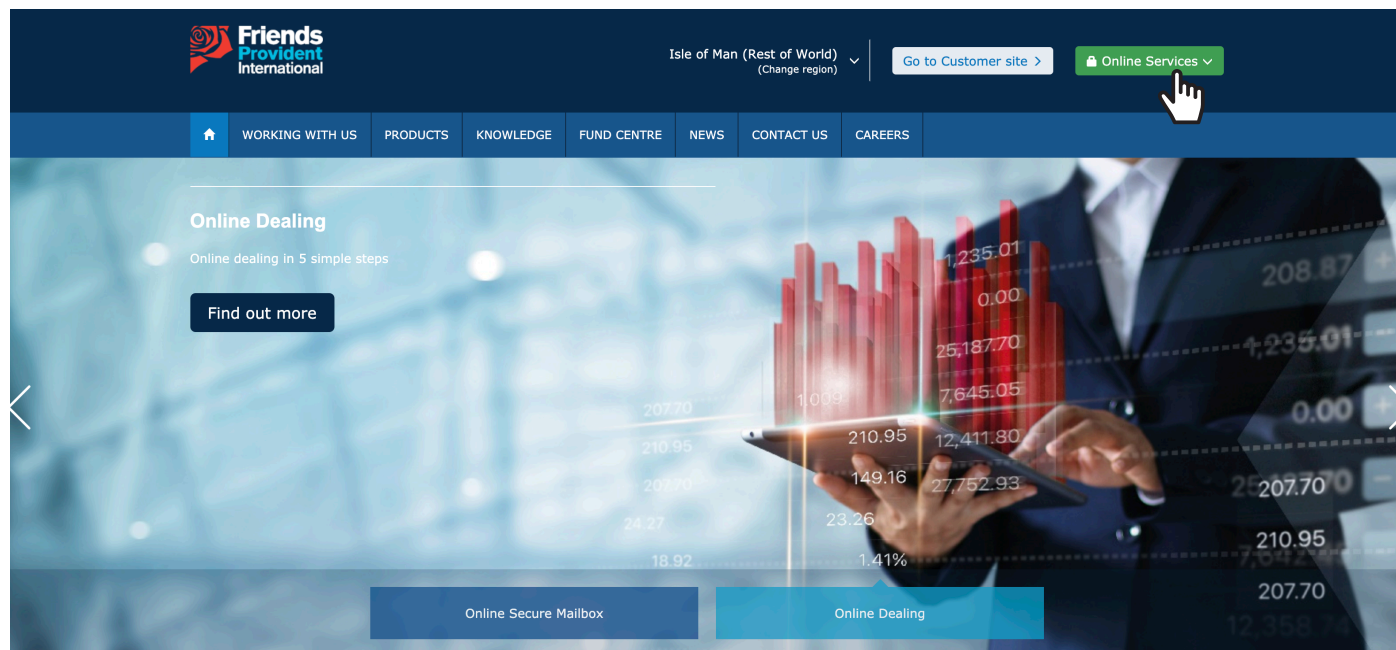
Please note that this is not applicable for Portfolio Bonds.

## Index

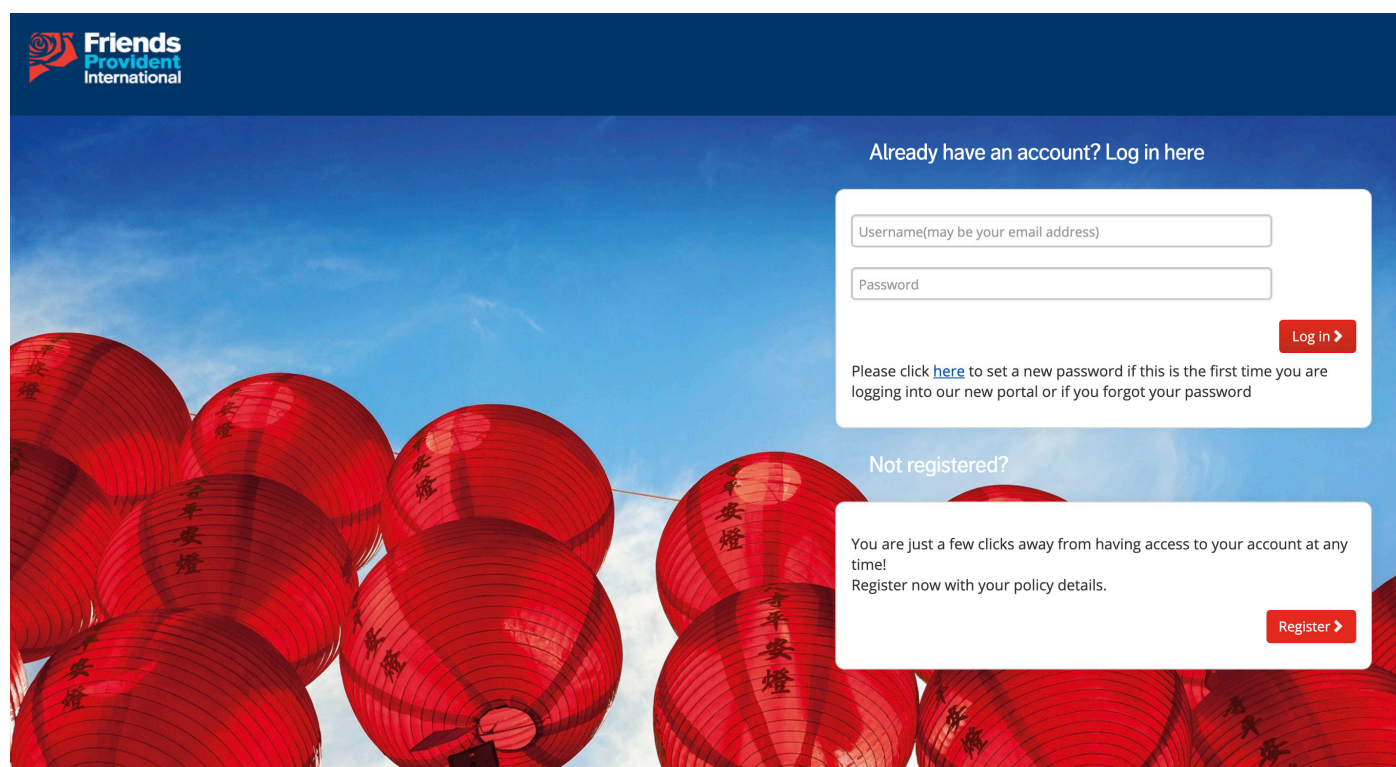
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## Log in or register

- Log in or register for a FPI Portal account by clicking the **Online Services** button on the home page on our website [www.fpiinternational.com](http://www.fpiinternational.com)



- Enter your name, password and the one time password (OTP) we send to your mobile device.



## Switching & redirection important notice

- Select the policy that you wish to create the instruction on.
- Select the **Switching & redirection** tab and choose the instruction you want to make:
  - Switch
  - Redirect
  - Switch & Redirect
- Please note **NB.** denotes important information.

**NB.** If you are a joint policyholder or an adviser who requires authority to deal, the approver must have a registered Portal Account in order to approve and submit your transaction requests.

**NB.** Advisers with OMA levels 2 or 3 are able to do direct submission without approval.

**NB.** A switch enables you to make changes to the existing unit holdings. A redirection enables you to make changes to the allocation of your future premiums.

**NB.** You can only submit one online instruction per dealing day.

My plans

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### Policy details

#### Plan summary

Product Global Wealth Builder	Next premium due date 25-Mar-2020
Effective date 25-Dec-2011	Last payment received on 25-Feb-2020
Valuation currency Singapore Dollar	Valuation value 76,166.59
	Valuation value as of 16-Mar-2020

#### Broker details

Name Fafaap Pae Tap Pep	Address 229 Peeptfattap Teaf #03-30 Peeptfattap Tteata Tapkapeta 398007
Phone number	
Email address	

PoliciesClientsPremium historyHoldingsCurrent investment choicesTransaction historyValuation reportGain/Loss reportSwitching & redirectionE - Transaction

#### Transaction

##### Switching funds

You can change your investments by selling fund units and buying new ones.

[Switch funds >](#)

##### Redirect future payments

You can change where your future payments are invested.

[Redirect future payments >](#)

##### Switch funds and Redirecting future payments

You can change your investments by selling fund units and buying new ones. You can also change where your future payments are invested.

[Switch funds & redirect future payments >](#)

- Read the important wording and click **Proceed**.

Security

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Switching & redirection

E - Transaction

### Switching funds

You can choose to either

- ▶ switch out of some or all existing funds into other funds, or
- ▶ redirect future payments into different funds, or
- ▶ a combination of the two.

In certain circumstances you may be required to implement a redirect after a switch, if this is required the system will notify you.

Notes

1. You may only hold a maximum of 10 funds in a policy at any one time.
2. Instructions may require approval from policyholders. If you do not have authority to submit the instruction on behalf of all policyholders, an authorisation request will be sent to the online services Portal account of all required approvers. If you are a joint policyholder and would like to receive an Appointment of Dual Authority Form, please [Contact Us](#).
3. Instructions will only be queued for processing once all required approvals have been received.
4. Instructions queued for processing between 17:00 and 01:00 GMT, or at any time on a non-working day in the United Kingdom, will be validated and processed on the next dealing day.
5. The fund price date will be the next price available after the day that the switch is processed. Please note that not all funds are priced daily so there may be a waiting period before the whole switch is performed.
6. Switch instructions only apply to money already invested in your policy. The instructions do not affect any future payments once applied to your policy.
7. Redirections will be applied to the next premium invested after the date of your instruction.
8. Transactions are currently processed free of charge, however, we do reserve the right to charge in the future.
9. You are only able to submit one instruction online per dealing day.
10. Investment involves risk and each investment will involve its own individual level of risk. We recommend that you discuss specific risks associated with individual investments with your Financial Advisor before making investment decisions. Friends Provident International is not responsible for any loss suffered or reduction in the value of your policy arising from the performance of your selected funds.

By clicking proceed I confirm that I have read, understood, and agree to the above.

◀ Back

Proceed ▶





## Creating a switch instruction – selling funds

- The next screen displays a breakdown of your current assets. Any assets that are greyed out cannot be sold because they are not available for online switching.
- Select one of the following options in order to create your switch instruction:
  - Switch (sell) 100% out of all your current funds
  - Switch (sell) out of selected funds
- If you are switching out of specific funds, tick the relevant boxes and input the percentage amount of how much you wish to sell from each fund.
- You can choose to sell different percentage amounts of each chosen fund, as shown in the example below.
- When you have input your sale order, click **Continue**.

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Switching funds

1

Select funds to sell

2

Select funds to buy

3

Review

Switch 100% out of all my current funds and make an entirely new fund choice, or

Switch out of selected funds individually. Please select one or more funds from the list below and the value you want to sell.

Current Funds

Please select funds to switch out

	Fund code	Fund name	Latest unit holding	Latest value	Switch Out (%)
<input type="checkbox"/>	R106	R106 BlackRock World Gold	1,542.03	USD 1,609.88	<input type="text"/>
<input checked="" type="checkbox"/>	R107	R107 Mellon Global Bond (USD)	15,602.07	USD 18,769.30	<input type="text" value="100"/>
<input type="checkbox"/>	R145	R145 HSBC GEM Debt Total Return	13,544.30	USD 15,426.95	<input type="text"/>
<input checked="" type="checkbox"/>	R148	R148 Schroder US Smaller Companies	3,417.43	USD 13,803.01	<input type="text" value="50"/>
<input type="checkbox"/>	R213	R213 Allianz GEM Equity High Dividend	29,158.35	USD 15,832.98	<input type="text"/>

The data shown is as of Mar 16, 2020 12:00:00 AM

Please refer to [Factsheet](#) to view your fund related details.

< Back

Continue >

## Creating a switch instruction – buying funds

- On this screen, you can now input the funds you wish to buy by clicking **Add funds**.

**Switching funds**

1 Select funds to sell 2 Select funds to buy 3 Review

**Fund selection and allocation**

You may either

1. Select "Add Funds" to find your fund choice, or
2. Increase your investments in your existing funds listed below.

Once you have selected your new funds, enter the percentage amounts in the Switch In (%) column.  
Please note that you cannot have holdings in more than ten funds at any time.

Fund code	Fund name	Switch (%)
Fund to switch out		
R107	R107 Mellon Global Bond (USD)	100
R148	R148 Schroder US Smaller Companies	50
Fund to switch in		
No new funds selected		
Total (must equal 100%)		0

[Back](#) [Add funds](#) [Continue](#)

- Use the search fields and **Search** to locate the funds you want to buy.
- Click **Add** next to the funds you have chosen.
- Once you have added your new funds, click **Done**.

**Add funds**

Fund name Fund code Company name Sector

JP All

[Click link here to get fund related details](#) [Search](#)

Fund code	Fund name	
R09	R09 JPM Taiwan	<a href="#">Add</a>
R101	R101 JPMorgan Liquidity SGD	<a href="#">Add</a>
R150	R150 JPM Emerging Markets Small Cap	<a href="#">Add</a>
R175	R175 JPM USD Money Market	<a href="#">Add</a>
R187	R187 JPM Global Unconstrained Equity	<a href="#">Add</a>

If you require any assistance, please [contact our customer service team](#). [Done](#)

## Creating a switch instruction – buying funds

- Indicate how you want to split your new fund choices by adding a % to each new fund (totalling 100%).


**NB.** You can remove any funds you have added by clicking **Remove** and then **OK** in the notification pop-up.

**NB.** You can only proceed if the total percentage equals 100%.

**NB.** You are able to hold up to 10 funds within a policy. Purpose Saver policyholders can select more than 10 funds on a switching/redirection transaction.

- Click **Continue** to review and submit your instruction.

### Switching funds

  
Select funds to sell

2

  
Select funds to buy

3

  
Review

#### Fund selection and allocation

You may either

- Select "Add Funds" to find your fund choice, or
- Increase your investments in your existing funds listed below.

Once you have selected your new funds, enter the percentage amounts in the Switch In (%) column.  
Please note that you cannot have holdings in more than ten funds at any time.

Fund code	Fund name	Switch (%)	
Fund to switch out			
R107	R107 Mellon Global Bond (USD)	100	
R148	R148 Schroder US Smaller Companies	50	
Fund to switch in			
R101	R101 JPMorgan Liquidity SGD	<input type="text" value="50"/>	<button>Remove</button>
R150	R150 JPM Emerging Markets Small Cap	<input type="text" value="50"/>	<button>Remove</button>
Total (must equal 100%)		100	

< BackAdd fundsContinue >

## Creating a switch instruction – submitting your instruction

- Review your instruction and ensure that your choices are correct.
- Confirm the declaration and disclaimers and click **Submit**.
- If you chose **Switch & Redirect**, you should click **Continue** to proceed to the Redirection section of the instruction.

Switching funds

✓

Select funds to sell

✓

Select funds to buy

3

Review

Switch instructions

Switch out funds

Fund code	Fund name	Switch Out (%)
R107	R107 Mellon Global Bond (USD)	100
R148	R148 Schroder US Smaller Companies	50

Switch in funds

Fund code	Fund name	Switch In (%)
R101	R101 JPMorgan Liquidity SGD	50
R150	R150 JPM Emerging Markets Small Cap	50

Declarations and disclaimers

☒ I confirm that the details of this transaction have been completed accurately and in full.  
I confirm that I have read and understood all relevant documents relating to the funds selected.  
I request and authorise Friends Provident International to process this transaction as submitted.

< Back

Submit >

- You may require a valid Customer Knowledge Assessment (CKA), which has been passed within a year from the date of assessment, for specific FPI products (Global Wealth Advance, Global Wealth manager and Purpose Saver).
- Your instruction will be transacted providing that you have met the CKA criteria and are deemed to possess the knowledge and experience to purchase these funds independently from your financial adviser.
- If your CKA is not sufficient, your financial adviser can process this instruction for you.

Declarations and disclaimers

☒ I confirm that the details of this transaction have been completed accurately and in full.  
I confirm that I have read and understood all relevant documents relating to the funds selected.  
I request and authorise Friends Provident International to process this transaction as submitted.

☒ I confirm that the policyholder(s) has/have passed CKA (Customer Knowledge Assessment).

< Back

Submit >




## Creating a switch instruction – submitting your instruction

- The following message will display which means that your switching instruction has now been sent.

**NB.** Instructions that are sent outside of the UK working hours will be submitted the following working day.

**Confirmation**

 Thank you for submitting your switch instructions online.

Your instruction has been received at 26-03-2020 06:51:23 (GMT) and has been queued for validation and processing.

Please note that your instruction will be validated on the next dealing day at 27-03-2020 01:00:00 (GMT), and will be processed when all required approvals have been given.

Switches are processed using the next available pricing dates. Please note that switches involving weekly or monthly funds will take longer to complete. Redirections will be applied to the next premium invested after the date of your instruction.

The reference for this instruction is 1632011843-20200326-1585205483044. Please quote this reference if contacting us.

Please do not send another copy of this instruction as it may result in duplication of your instruction.


Please note your instruction will go through a system validation process, and should we be unable to proceed we will notify you by email. If this instruction has been submitted between 01:00 and 17:00 (GMT), this validation will not occur until the next dealing day.

Transaction home >

- If your instruction requires policyholder approval the following message will display.
- Your instruction will remain 'Pending Submission' until it is approved.

Policies Clients Premium history Holdings Current investment choices Transaction history Valuation report Gain/Loss report Switching & redirection E - Transaction

**Confirmation**

 Thank you for submitting your switch instructions online.

Your submitted transaction is pending approval from required policy holder. The effective date will follow the final date of required approval given.

Please note that your instruction will be validated on the next dealing day at 08-04-2020 01:00:00 (GMT), and will be processed when all required approvals have been given.

Switches are processed using the next available pricing dates. Please note that switches involving weekly or monthly funds will take longer to complete. Redirections will be applied to the next premium invested after the date of your instruction.

The reference for this instruction is 722424211-20200407-1586242902317. Please quote this reference if contacting us.

Please do not send another copy of this instruction as it may result in duplication of your instruction.

Please note your instruction will go through a system validation process, and should we be unable to proceed we will notify you by email. If this instruction has been submitted between 01:00 and 17:00 (GMT), this validation will not occur until the next dealing day.

Transaction home >

## Creating a redirection instruction

- This screen shows an overview of the funds that your premiums currently invest in.
- Click **Continue** to proceed.
- Please note **NB.** denotes important information.

**NB.** You are able to hold up to 10 funds within a policy. Purpose Saver policyholders can select more than 10 funds on a switching/redirection transaction.

The screenshot shows the 'Redirecting future payments' screen with a navigation bar at the top containing tabs: Policies, Clients, Premium history, Holdings, Current investment choices, Transaction history, Valuation report, Gain/Loss report, Switching & redirection (active), and E - Transaction. Below the navigation bar, a progress bar shows three steps: 1. View instructions for current payments (active), 2. Set instructions for future payments, and 3. Review. The main content area is titled 'View instructions for current payments' and contains a table with the following data:

Fund code	Fund name	(%)Allocation
R151	R151 Invesco Global Health Care	75
R126	R126 Vanguard US500 Stock Index	25

Below the table, there is a note: 'Please refer to [Factsheet](#) to view your fund related details.' At the bottom right, there are two buttons: '< Back' and 'Continue >'.

- You can either: change the percentage of your premiums allocated to your chosen funds; or **Remove** them so they will no longer receive future investments.
- If you wish to invest into a fund not displayed on the screen, click **Add funds**.

The screenshot shows the 'Redirecting future payments' screen with the same navigation bar as the previous screenshot. The progress bar now shows step 1 as completed (with a green checkmark) and step 2, 'Set instructions for future payments', as the active step. The main content area is titled 'Set instructions for future payments' and contains a section titled 'Your new regular payment instruction'. Below this, there is a table with the following data:

Existing funds		
R151 Invesco Global Health Care	40 %	<b>Remove</b>
R126 Vanguard US500 Stock Index	25 %	<b>Remove</b>
Total	65	

Below the table, there is a red error message: 'Percentage must equal to 100%'. At the bottom right, there are three buttons: '< Back', 'Add funds', and 'Continue >'. A hand cursor icon is pointing at the 'Add funds' button.

## Creating a redirection instruction – buying funds

- Use the search fields and **Search** to locate your funds.
- Click **Add** next to the funds you want to invest in.
- Once you have added your new funds, click **Done**.

### Add funds

Fund name

Fund code

Company name

Sector

first state

All


[Click link here to get fund related details](#)

Search

Fund code	Fund name	
R112	R112 First State Asian Equity Plus	Add
R113	R113 First State China Growth	Add
R118	R118 First State Greater China Growth	

If you require any assistance, please [contact our customer service team](#).

Done



## Creating a redirection instruction – buying funds

- Indicate how you want to split your new fund choices by adding a % to each fund (totalling 100%).

**NB.** You can remove any funds that you have added by clicking **Remove** and then **OK** in the notification pop-up.

**NB.** You can only proceed when the total percentage equals 100%.

**NB.** You are able to hold up to 10 funds within one policy. Purpose Saver policyholders can select more than 10 funds on a switching/redirection transaction.

- Click **Continue** to review and submit your instruction.

Redirecting future payments

1  
View instructions for current payments

2  
Set instructions for future payments

3  
Review

Set instructions for future payments

Your new regular payment instruction

Existing funds		
R151 Invesco Global Health Care	40 %	Remove
R126 Vanguard US500 Stock Index	25 %	Remove
New funds		
R118 First State Greater China Growth	35 %	Remove
Total	100	

< Back

Add funds

Continue >



## Creating a redirection instruction – submitting your instruction

- Review your instruction and ensure that your choices are correct.
- Confirm the declaration and disclaimers and click **Submit**.

Redirecting future payments

View instructions for current payments

Set instructions for future payments

3 Review

Review

These are your new allocation instructions for all future payments. Please check whether the details below are correct before submitting.

Fund details	% allocation
R151 Invesco Global Health Care	40
R126 Vanguard US500 Stock Index	25
New funds	
R118 First State Greater China Growth	35
Total	100%

Declarations and disclaimers

☒ I confirm that the details of this transaction have been completed accurately and in full.  
I confirm that I have read and understood all relevant documents relating to the funds selected.  
I request and authorise Friends Provident International to process this transaction as submitted.

< Back

Submit >

- You may require a valid Customer Knowledge Assessment (CKA), which has been passed within a year from the date of assessment, for specific FPI products (Global Wealth Advance, Global Wealth manager and Purpose Saver).
- Your instruction will be transacted providing that you have met the CKA criteria and are deemed to possess the knowledge and experience to purchase these funds independently from your financial adviser.
- If your CKA is not sufficient, your financial adviser can process this instruction for you.

Declarations and disclaimers

☒ I confirm that the details of this transaction have been completed accurately and in full.  
I confirm that I have read and understood all relevant documents relating to the funds selected.  
I request and authorise Friends Provident International to process this transaction as submitted.

☒ I confirm that the policyholder(s) has/have passed CKA (Customer Knowledge Assessment).

< Back


Submit >

## Creating a redirection instruction – submitting your instruction

- The following message will display which means that your instruction has now been submitted.

**NB.** Instructions that are sent outside of the UK office hours will be actioned the following working day.

**Confirmation**

 Thank you for submitting your redirection instructions online.

Your instruction has been received at 03-04-2020 10:07:57 (GMT) and has been queued for validation and processing.

Please note that your instruction will be validated on the next dealing day at 06-04-2020 01:00:00 (GMT), and will be processed when all required approvals have been given.

Switches are processed using the next available pricing dates. Please note that switches involving weekly or monthly funds will take longer to complete. Redirections will be applied to the next premium invested after the date of your instruction.

The reference for this instruction is 182918102-20200403-1585908477573. Please quote this reference if contacting us.

Please do not send another copy of this instruction as it may result in duplication of your instruction.


Please note your instruction will go through a system validation process, and should we be unable to proceed we will notify you by email. If this instruction has been submitted between 01:00 and 17:00 (GMT), this validation will not occur until the next dealing day.

Transaction home >

- If your instruction requires policyholder approval, the following message will display.
- Your instruction will remain 'Pending Submission' until it is approved.

Policies Clients Premium history Holdings Current investment choices Transaction history Valuation report Gain/Loss report Switching & redirection E-Transaction

**Confirmation**

 Thank you for submitting your redirection instructions online.

Your submitted transaction is pending approval from required policy holder. The effective date will follow the final date of required approval given.

Please note that your instruction will be validated on the next dealing day at 08-04-2020 01:00:00 (GMT), and will be processed when all required approvals have been given.

Switches are processed using the next available pricing dates. Please note that switches involving weekly or monthly funds will take longer to complete. Redirections will be applied to the next premium invested after the date of your instruction.

The reference for this instruction is 1664780476-20200407-1586244126019. Please quote this reference if contacting us.

Please do not send another copy of this instruction as it may result in duplication of your instruction.

Please note your instruction will go through a system validation process, and should we be unable to proceed we will notify you by email. If this instruction has been submitted between 01:00 and 17:00 (GMT), this validation will not occur until the next dealing day.

Transaction home >

## Post-submission – accepted instructions

- Please note that if you are a joint policyholder or an adviser who requires authority to deal, please refer to the section 'Policyholder approval process' for the appropriate next steps.
- An instruction submitted successfully will have a status of 'submitted'. You can track the status of your instructions in the **Transaction Status** menu on Portal.
- You will receive an email with the subject 'Friends Provident International Switching and Premium Redirection Instruction' which will confirm the submission of the instruction.
- An instruction that has been 'Pending Submission' for 7 days will expire.

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### Transaction Status (Switching and Redirection)

Status Enquiry

E-reference number

Policy number

Transaction type

Creation from date

Creation to date

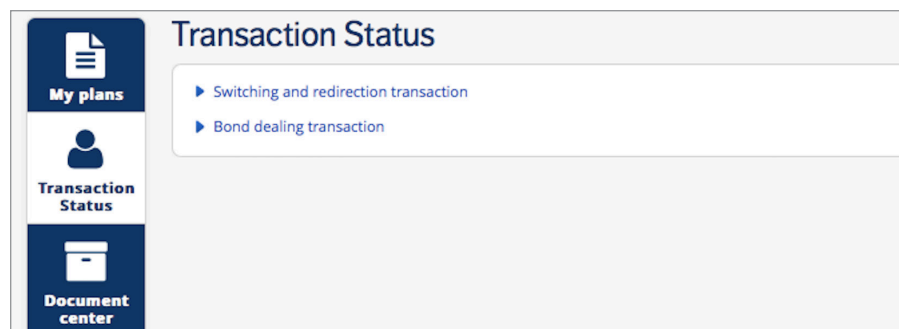
Status

Search

No. ^	E-reference no. ^	Policy owner name ^	Policy number ^	Plan name ^	Transaction type ^	Create date & time ^	Status ^
1				Executive Savings Plan	Switching	2020-02-25 22:19:40	Submitted
2				Executive Savings Plan	Switching	2020-02-24 22:51:53	Submitted
3				Executive Savings Plan	Switching	2020-02-17 22:29:00	Submitted
4				Executive Savings Plan	Switching	2020-02-12 22:34:21	Submitted
5				Executive Savings Plan	Switching	2020-02-12 22:28:31	Submitted

## Policyholder approval

- An email with the subject line 'Friends Provident International Switching Transaction Approval Request' will be sent to the policyholder for review and approval.
- Log in to Portal to review and approve the instruction through the **Transaction Status** menu.
- Enter the **Transaction Status** menu and select **Switching and redirection transaction**.



- Select the **Pending Approval** tab.
- Read the important wording and click **Proceed**.

A screenshot of the 'Transaction Status' page with the 'Pending Approval' tab selected. The sidebar on the left has six icons: 'My plans', 'Transaction Status' (highlighted), 'Document center', 'Personal details', 'Security', and 'Contact us'. The main content area is titled 'Transaction Status' and has three tabs: 'Status Enquiry', 'Pending Approval' (selected), and 'Approval History'. Below the tabs is the heading 'Switching funds and redirect future payments'. The text reads: 'You can choose to either' followed by three bullet points: 'switch out of some or all existing funds into other funds, or', 'redirect future payments into different funds, or', and 'a combination of the two.' Below this is a note: 'In certain circumstances you may be required to implement a redirect after a switch, if this is required the system will notify you.' A large light blue box contains a 'Notes' section with 10 numbered points. At the bottom left of the main area, it says 'By clicking proceed I confirm that I have read, understood, and agree to the above.' At the bottom right is a red button labeled 'Proceed >'.

**Transaction Status**

Status Enquiry Pending Approval Approval History

### Switching funds and redirect future payments

You can choose to either

- ▶ switch out of some or all existing funds into other funds, or
- ▶ redirect future payments into different funds, or
- ▶ a combination of the two.

In certain circumstances you may be required to implement a redirect after a switch, if this is required the system will notify you.

**Notes**

1. You may only hold a maximum of 10 funds in a policy at any one time.
2. Instructions may require approval from policyholders. If you do not have authority to submit the instruction on behalf of all policyholders, an authorisation request will be sent to the online services Portal account of all required approvers. If you are a joint policyholder and would like to receive an Appointment of Dual Authority Form, please Contact Us.
3. Instructions will only be queued for processing once all required approvals have been received.
4. Instructions queued for processing between 17:00 and 01:00 GMT, or at any time on a non-working day in the United Kingdom, will be validated and processed on the next dealing day.
5. The fund price date will be the next price available after the day that the switch is processed. Please note that not all funds are priced daily so there may be a waiting period before the whole switch is performed.
6. Switch instructions only apply to money already invested in your policy. The instructions do not affect any future payments once applied to your policy.
7. Redirections will be applied to the next premium invested after the date of your instruction.
8. Transactions are currently processed free of charge, however, we do reserve the right to charge in the future.
9. You are only able to submit one instruction online per dealing day.
10. Investment involves risk and each investment will involve its own individual level of risk. We recommend that you discuss specific risks associated with individual investments with your Financial Advisor before making investment decisions. Friends Provident International is not responsible for any loss suffered or reduction in the value of your policy arising from the performance of your selected funds.

By clicking proceed I confirm that I have read, understood, and agree to the above.

**Proceed >**



## Policyholder approval

- Using the e-reference number provided in the email, identify and click into the instruction.

### Transaction Status

[Status Enquiry](#) [Pending Approval](#) [Approval History](#)

E-reference number

Policy number

Transaction type

Creation from date

Creation to date

Apr

2020

Apr

2020

[Search](#)

No.	E-reference No.	Clients name	Policy number	Plan name	Transaction type	Financial adviser name	Create date & time
1				Premier Capital Redemption	Switching and Premium Redirection	PN - JAF	2020-04-07 11:44:39

- Review the instruction and **Confirm** that Friends Provident International can proceed with placing the deals.
- Click **Approve** to complete the submission process.
- All parties will receive a notification email confirming the submission of the instruction.

### Pending Approval Details

Plan name

Premier

Transaction type

Switching

Policy number

04-03-2020 13:41:01

Financial adviser name

Creation date & time

04-03-2020 13:41:01

E-reference number

Client name

#### Switch out

No.	Fund name	Allocation(%)
1	J57 Invesco Global Health Care	1

#### Switch in

No.	Fund name	Allocation(%)
1	J02 Invesco Asian Equity	100
Total		100.00

Message

Characters remaining

200

#### Declarations and disclaimers

☒ I confirm that I have reviewed and understood this transaction, including having read and understood all relevant documents relating to the funds selected.  
I request and authorise Friends Provident International to process this transaction as submitted.

[Back](#)

[Approve](#)

[Reject](#)

## Policyholder approval

- The approver will be able to view all approved or rejected instructions in **Approval History**.

My plans

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### Transaction Status

Status Enquiry Pending Approval Approval History

E-reference number

Policy number

Transaction Type

Submission from date

Submission to date

Requestor

Search

No. ^	E-reference number ^	Policy number ^	Transaction type ^	Requestor name ^	Approve/reject date & time ^	Status ^
1			Switching		2020-03-02 18:30:52	Approved
2			Switching and Premium Redirection		2020-02-25 17:20:57	Approved
3			Switching		2020-02-18 22:27:46	Approved

- All instructions can be viewed in **Status Enquiry**.

My plans

Transaction Status

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Personal details

Security

Contact us

### Transaction Status (Switching and Redirection)

Status Enquiry

E-reference number

Policy number

Transaction type

Creation from date

Creation to date

Status

Search

No. ^	E-reference no. ^	Policy owner name ^	Policy number ^	Plan name ^	Transaction type ^	Create date & time ^	Status ^
1				Executive Savings Plan	Switching	2020-02-25 22:19:40	Submitted
2				Executive Savings Plan	Switching	2020-02-24 22:51:53	Submitted
3				Executive Savings Plan	Switching	2020-02-17 22:29:00	Submitted
4				Executive Savings Plan	Switching	2020-02-12 22:34:21	Submitted
5				Executive Savings Plan	Switching	2020-02-12 22:28:31	Submitted

## Policyholder approval process – rejected or expired instructions

- If the instruction has been rejected, the submitter will receive an email with the subject line “Friends Provident International Switching Instruction Rejected”.
- If no action is taken after 7 days then the pending instruction will expire and an email will be sent with the subject line ‘Friends Provident International Transaction Expired’.
- All instructions will be shown in the **Transaction Status** menu and a full audit trail will be displayed.

My plans

Transaction Status

Document center

Personal details

Security

Contact us

### Transaction Status (Switching and Redirection)

Status Enquiry Pending Approval Approval History

E-reference number

Policy number

Transaction type

Creation from date

Creation to date

Status

Search

No. ↕	E-reference no. ↕	Policy owner name ↕	Policy number ↕	Plan name ↕	Transaction type ↕	Create date & time ↕	Status ↕
1				International Protector Asia	Switching	2020-03-04 13:41:00	Expired
2				Premier Wealth Capital Redemption	Switching and Premium Redirection	2020-02-21 18:29:56	Pending Submission
3				Premier Wealth Capital Redemption	Switching	2020-02-18 22:21:44	Pending Submission
4				Premier Wealth Capital Redemption	Switching	2020-02-11 16:27:52	Expired

## Online Switch & Redirection – FAQs

What if I have a joint account without dual authority?	<ul style="list-style-type: none"><li>• A request will go to the other party, who must be registered to Portal, for their approval – your confirmation message will advise you of this.</li><li>• Another confirmation message will advise you when it is approved.</li></ul>
What if I want to go back and make more switches?	<ul style="list-style-type: none"><li>• You can only submit one switch or redirection instruction on your policy per day.</li><li>• The following day you will be able to submit another instruction.</li></ul>
I have more than one policy. Will my fund choices affect all of them?	<ul style="list-style-type: none"><li>• No, a switch &amp; redirection transaction will only apply to the policy you select after logging in.</li></ul>
How long will my instruction take to be actioned?	<ul style="list-style-type: none"><li>• An instruction that requires policyholder approval will remain 'pending submission' until it is approved.</li><li>• Instructions that are sent outside of UK office hours (9am – 5pm GMT) will be actioned the following working day.</li></ul>
Who do I contact if I am having issues with submitting my instruction?	<ul style="list-style-type: none"><li>• If you have any issues regarding online instructions, please contact our Customer Services team on +44 1624 821 212 or through the secure mailbox on FPI Portal.</li></ul>

If you have any questions, please contact the Switching & Redirection Team on the details below

Email: [ccs@fpiom.com](mailto:ccs@fpiom.com)

Telephone number: +44 (0) 1624 821212

Portal Secure Mailbox

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