Documents you should read

These are the other documents I’ve provided to you. It’s essential you read these before making any decisions.

Always include disclosure documents

HSBC Premier Financial Advice Service

* Terms of Business
* Advice Disclosure Document
* Your advice agreement

IMPORTANT: only include relevant documents – delete all that don’t apply

Product documents for each recommended protection policy

* Personalised illustration
* Key Features Document
* Policy booklet/brochure
* Terms and conditions

INSERT\_2

Documents for each recommended Field\_1 product:

* Key Features Document
* Brochure
* GIC Advice Addendum
* Bonds only Key Information Document
* Terms and conditions
* Personalised illustration
* PIMS Privacy Notice Overview
* PIMS/GIC Financial Services Compensation Scheme Information Sheet
* Prudential Return of Premium Death Benefit Option Leaflet

INSERT\_3

Documents for each recommended Field\_2:

* Key Investor Information Document
* Costs and Charges Disclosure Document
* Not PIMS Fund factsheet
* Premier Field\_3 Management Service Field\_4 Portfolio Overview
* Bonds only Investment Options Document

Other documents

* Trust Information Sheet
* Report appendix
* ‘Explaining Stochastic Modelling’ leaflet
* A guide to Inheritance Tax and Estate Planning
* ‘Attorneys and Deputies’ information sheet