



MAXWEALTH CONSULTANCY

INSPIRING FINANCIAL EXCELLENCE

FUND SWITCHING

How to **Switch** Funds

Manulife Investments online portal · step-by-step guide

YOUR ADVISER

Muhammad Khairul Khalis

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Scan to open the registration
page



Before you switch

Switching moves your investment from one fund to another **inside the same account**, without withdrawing to your bank.

- 1 Same account only**
UT funds within that UT account; PRS funds within your PRS. You can't switch between two accounts, or between UT and PRS.
- 2 4:00 pm cut-off**
Submitted before 4:00 pm on a business day: that day's closing price. Later, or on a non-business day: the next business day's price. You won't know the exact price when you submit.
- 3 Fees**
A switching fee or sales-charge difference may apply, depending on the funds. The screen shows it before you confirm; details are in the fund's PHS and prospectus.
- 4 Minimum amount**
Switching into a fund you don't hold yet? The amount must meet that fund's minimum initial investment.
- 5 Joint accounts**
Online switching is done by the principal holder.

Before switching, ask: does the new fund still match my risk profile and goal?
If unsure, talk to me first.



CHECK

Two ways to switch

Manulife Investments

Select account ownership type

Single account

Joint account

Do you authorise your adviser to switch funds on your behalf?

+ Information on switch funds

☒ Yes, I authorise my adviser to switch funds on my behalf.

☐ No, I do not authorise my adviser to switch funds on my behalf.

Up Next: Primary Applicant's Personal Information

- 1 You chose **"Yes, I authorise my adviser"** when opening the account: switch yourself with Steps 1-6, **or** send me your instruction and I'll submit it (last page).
- 2 You chose **"No"**: switch yourself with Steps 1-6.

Don't remember what you chose? WhatsApp me and I'll check.



STEP 1 OF 6

Log in

Manulife Investments

Login

Username
Enter username or email address

Password
Enter password

[Forgot your password?](#)

Login

or

Login with passkey

Now you can view
information on your free
insurance and/or

1 Enter your registered email and password.

2 Tap **Login**.

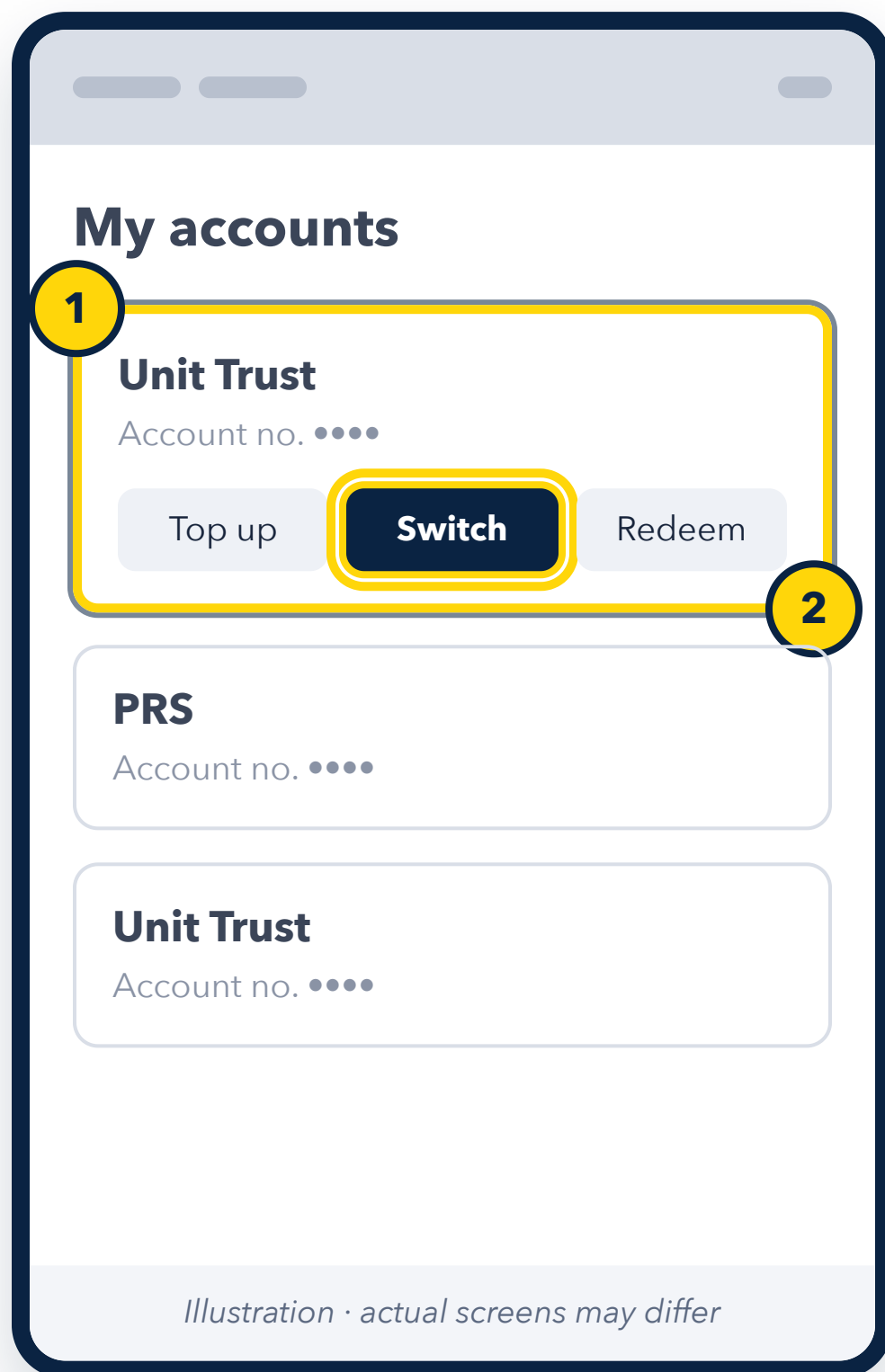
Log in here →

https://client.asia.manulifeam.com/en_MY/Login



STEP 2 OF 6

Open the account



- 1 Tap the account that holds the fund you want to switch out of.
- 2 Look for the **Switch** option, usually next to Buy / Top up and Sell / Redeem.



STEP 3 OF 6

Switch from

Switch

Switch from
Fund A ▼

Amount Units All

RM

Switch to

Illustration · actual screens may differ

- 1 Choose the fund to switch **out of**.
- 2 Choose how much: an **amount**, a number of **units**, or **all**.



STEP 4 OF 6

Switch to

Switch

Switch from
Fund A

RM
1,000.00

Switch to
Fund B ▾

[Product Highlights Sheet](#) ›

Illustration · actual screens may differ

- 1 Choose the fund to switch **into**.
- 2 Read its **Product Highlights Sheet** before you continue.

New fund for you? Check the minimum initial investment.



STEP 5 OF 6

Review & confirm

Review

From	Fund A
To	Fund B
Amount	RM 1,000.00
Fee	RM **
Price	Closing price

Submit

Illustration · actual screens may differ

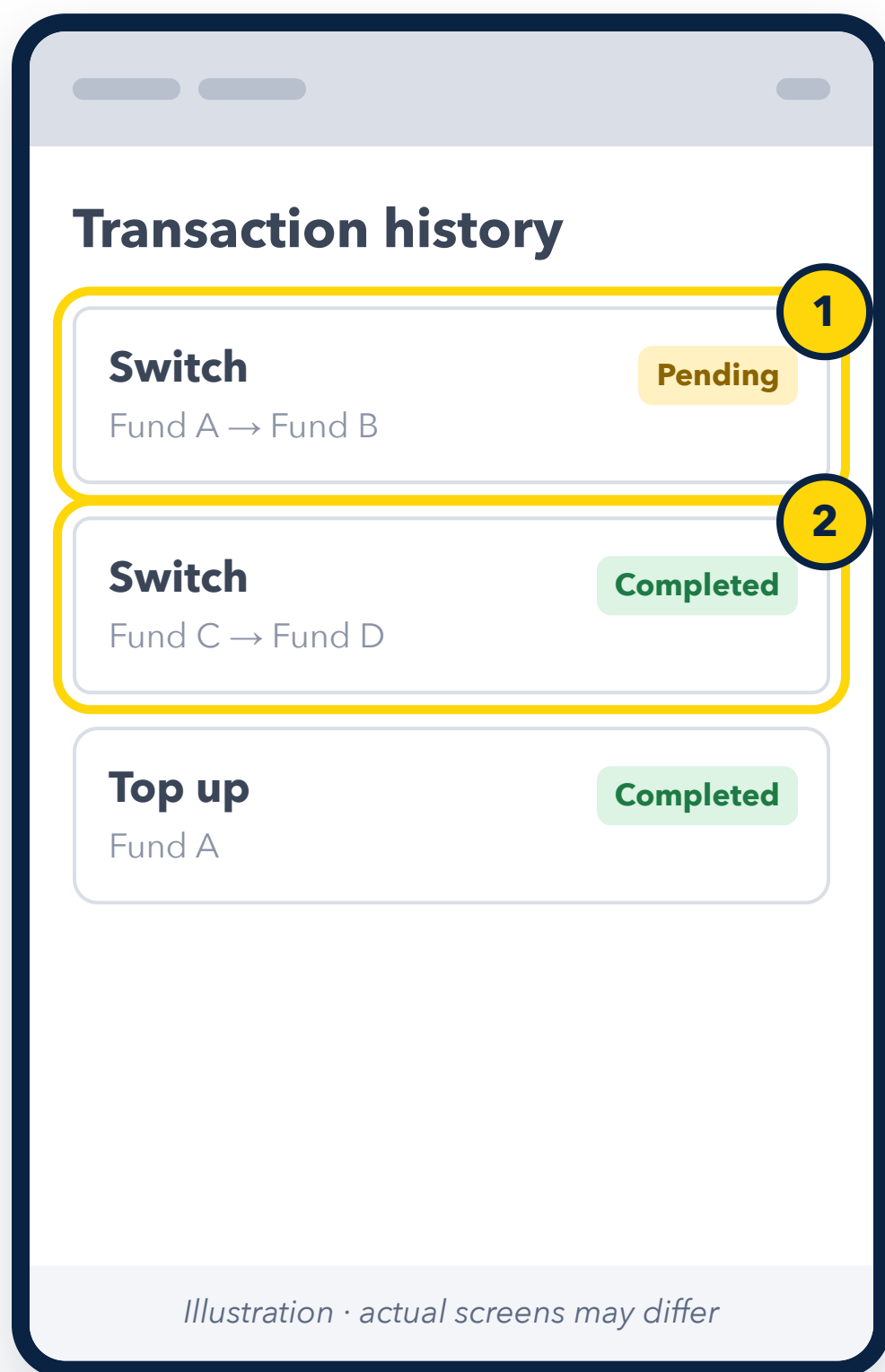
- 1 Check the **from** and **to** funds, the amount and any fee.
- 2 Tap **Submit**, then **Confirm**. Enter the OTP if asked.

Submit before 4:00 pm on a business day to get that day's price.



STEP 6 OF 6

Track the status



- 1 Open your transaction history: the switch shows as **pending** until it's processed.
- 2 Once **completed**, the new units appear in your account.



Prefer me to do it?

If you authorised me to switch for you, WhatsApp me your instruction in writing:

Hi Khairul, please switch for me:

Name: _____

Account no.: _____

From fund: _____

To fund: _____

Amount / units: _____ (or ALL)

I'll confirm the details with you before submitting, and you'll see the switch in your transaction history.



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Thank you for trusting me with your financial journey.

LINKS

Register (new user)

<https://client.asia.manulifeam.com/en/MY/NewUser?advisor=F527>

Log in (existing user)

<https://client.asia.manulifeam.com/en/MY/Login>

CONTACT

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MaxWealth Consultancy

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Important notice

This guide is prepared by Muhammad Khairul Khalis of MaxWealth Consultancy to help clients use the Manulife Investments online portal. It is not an official document of Manulife Investment Management (M) Berhad and is not investment advice. Screens and requirements may change without notice. Before investing, read and understand the Product Highlights Sheet and the Prospectus / Disclosure Document. Investments in unit trusts and PRS carry risks; unit prices and distributions may go down as well as up. Past performance is not indicative of future performance.