MAXWEALTH CONSULTANCY

INSPIRING FINANCIAL EXCELLENCE

REGULAR SAVINGS PLAN (RSP)

How to Set Up a Monthly RSP

Manulife iFUNDS · step-by-step guide

YOUR ADVISER

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Scan to open the registration page

Start small, add bit by bit

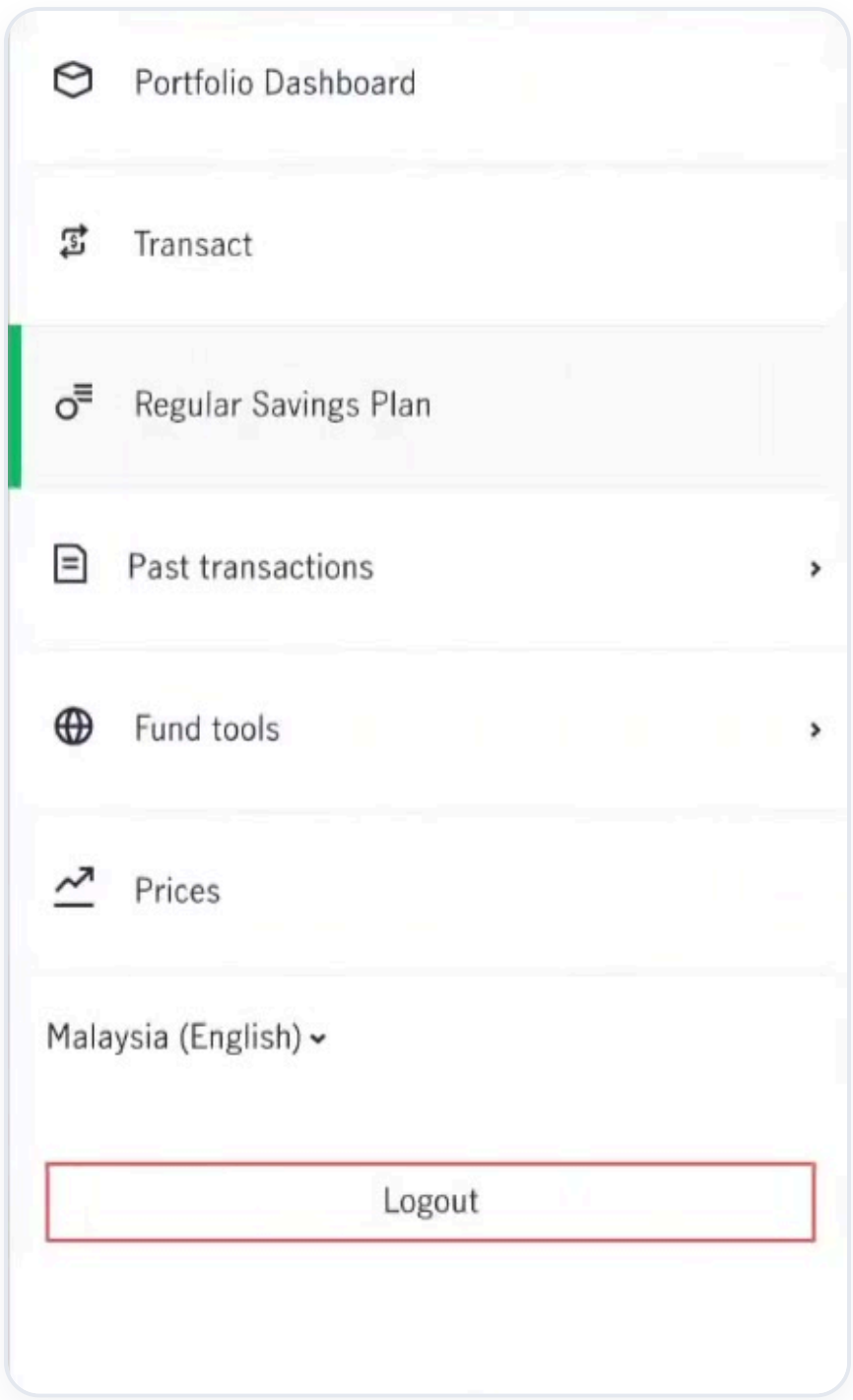
An RSP invests a fixed amount every month by direct debit from your bank. Start early, stay consistent, and add **+RM100** when your income grows.

Age	Monthly	Total invested by end of phase	Est. value (10% a year)
25–30	**RM200**	RM12,000	**~RM15,000**
30–40	**RM300** +RM100	RM48,000	**~RM103,000**
40–50	**RM400** +RM100	RM96,000	**~RM362,000**
25–50	RM200 only	RM60,000	~RM265,000

Illustration only, based on an assumed fixed return of 10% a year, compounded monthly. Actual returns vary and are not guaranteed. This is not a projection of returns.

STEP 1 OF 9

Open Regular Savings Plan



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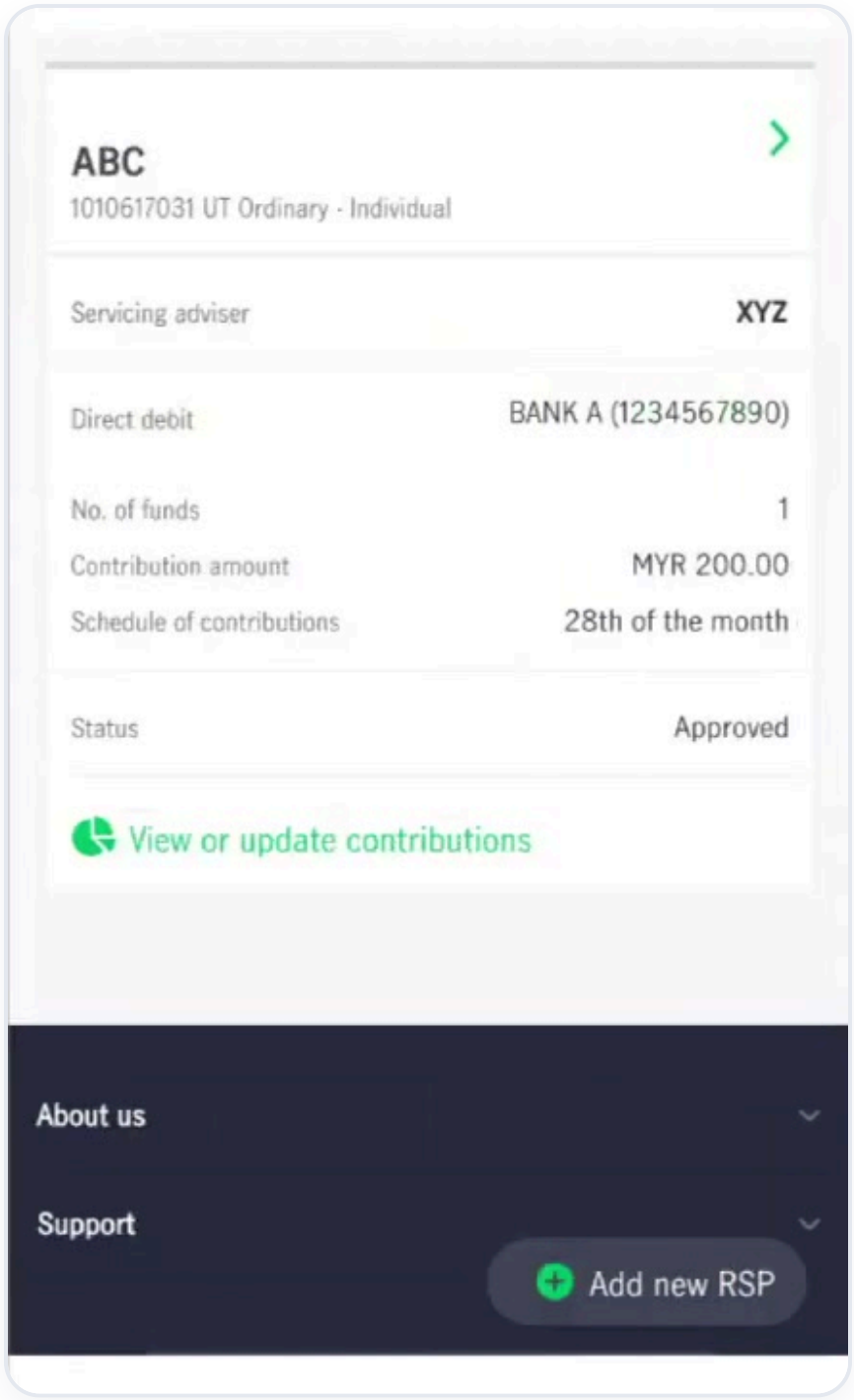
1. You need a Manulife iFUNDS account first (new investor? see my Open Account guide).
2. Log in and click **Regular Savings Plan** from the menu.

Log in here →

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

STEP 2 OF 9

Add a new RSP



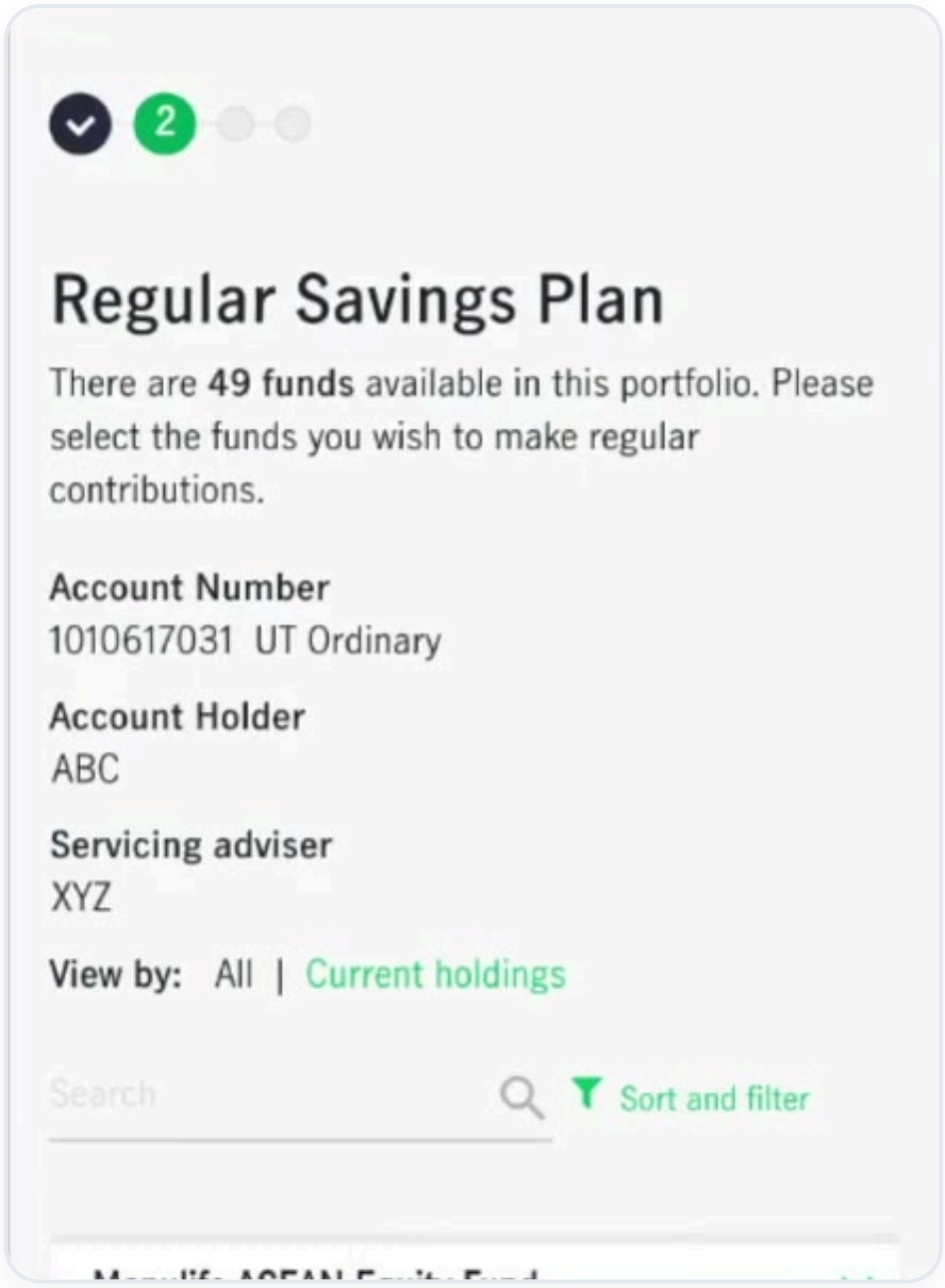
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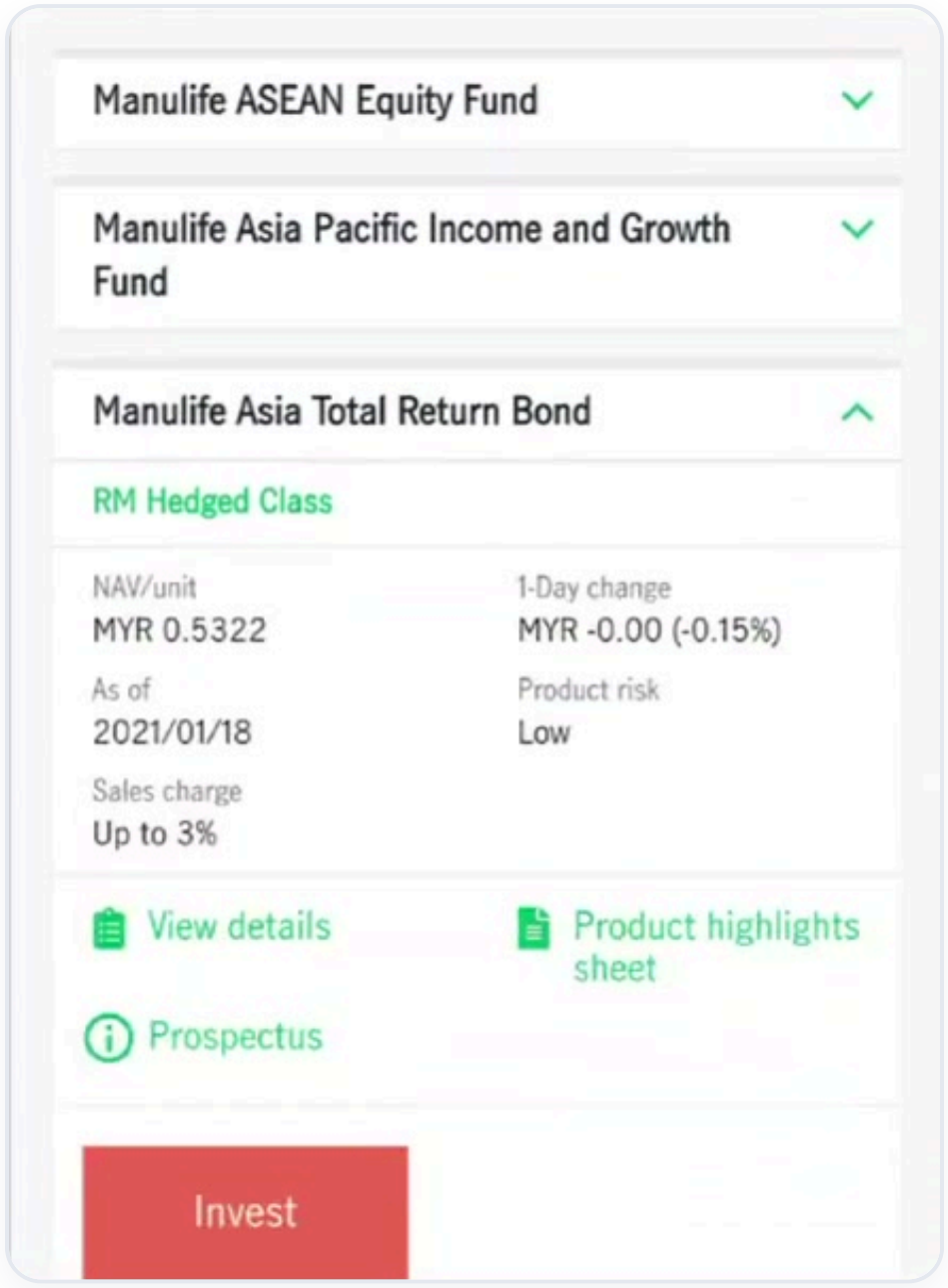
1. Existing RSP investors can view and select their current plans here.
2. To create a new RSP, click **Add new RSP**.

> No RSP yet? You won't see this page; you go straight to fund selection.

STEP 3 OF 9

Choose the fund





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1. Select the fund and, if applicable, a currency class to view the fund's details and documents.
2. Click **Invest**. You can add more than one fund.

Not sure which fund?

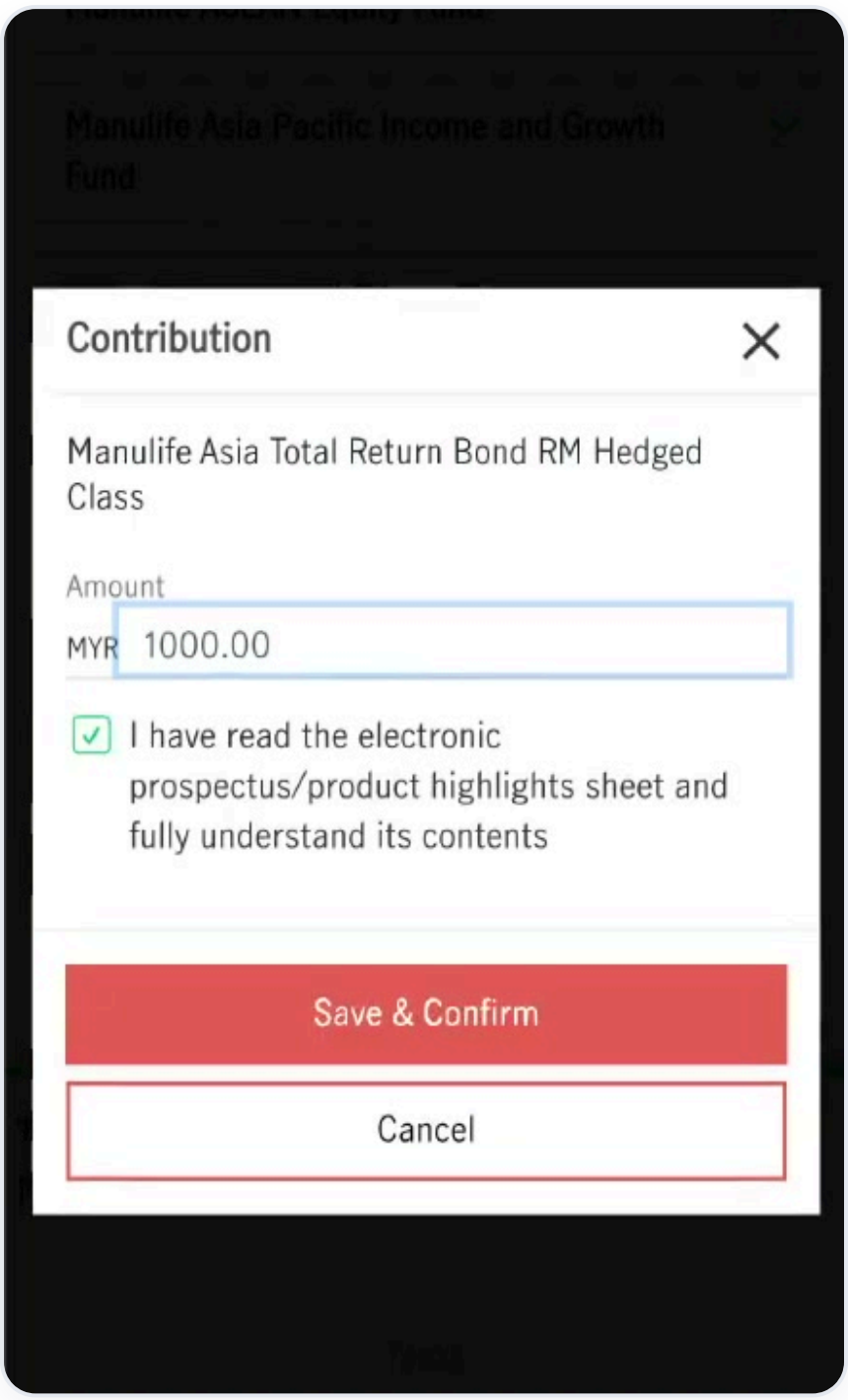
Tap one. The message is ready and goes to Ika, my admin.

✆ I don't have an account yet

✆ I already have an account

STEP 4 OF 9

Set the monthly amount

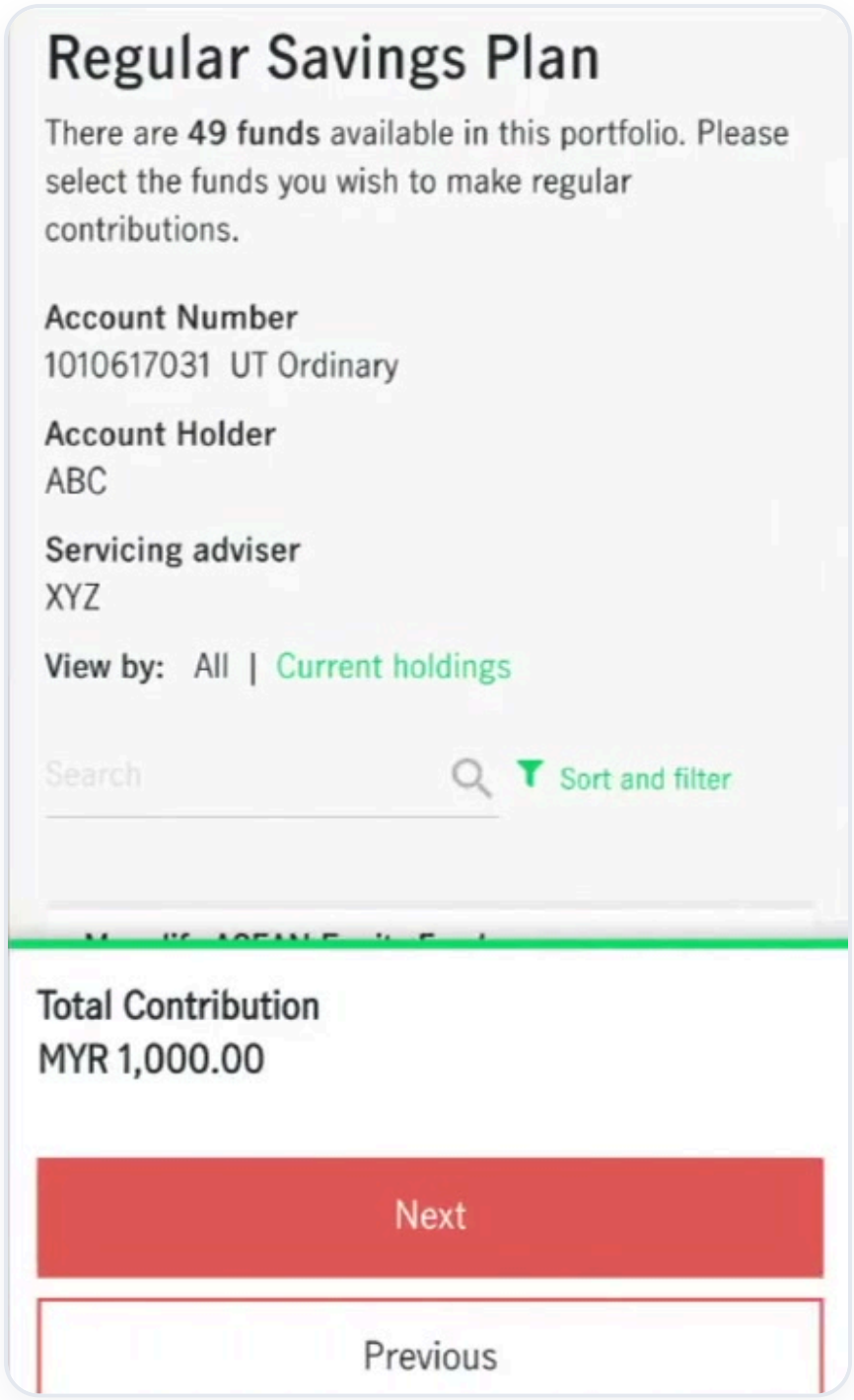


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1. Set the monthly contribution amount. A notification appears if it's less than the fund's requirement.
2. Tick the box to confirm you've read and understood the offering documents. Not read them yet? Return to the previous page.
3. Click **Save & Confirm**.

STEP 5 OF 9

Review and continue

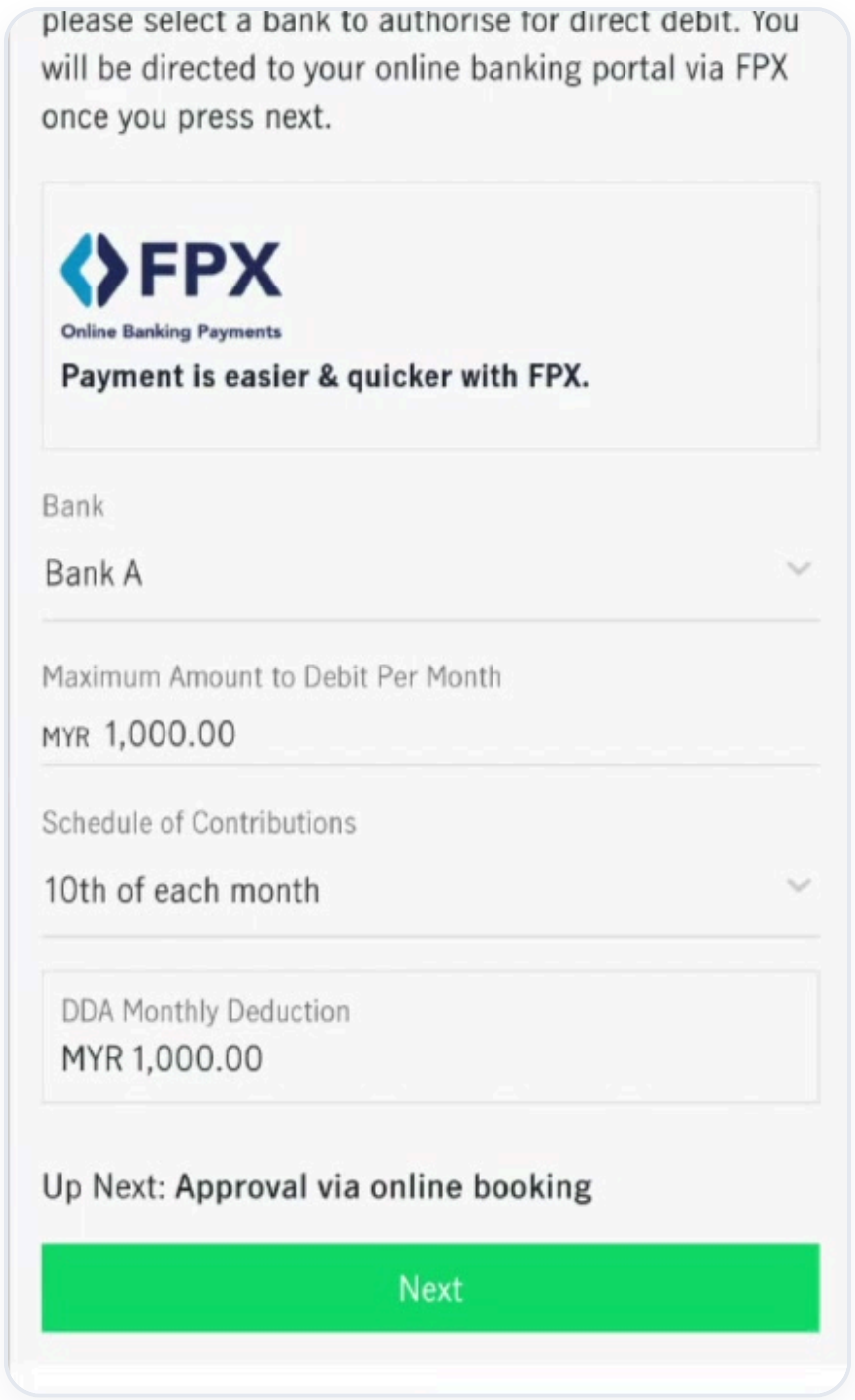


1. Review your investment details and click **Next**.

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STEP 6 OF 9

Direct debit details

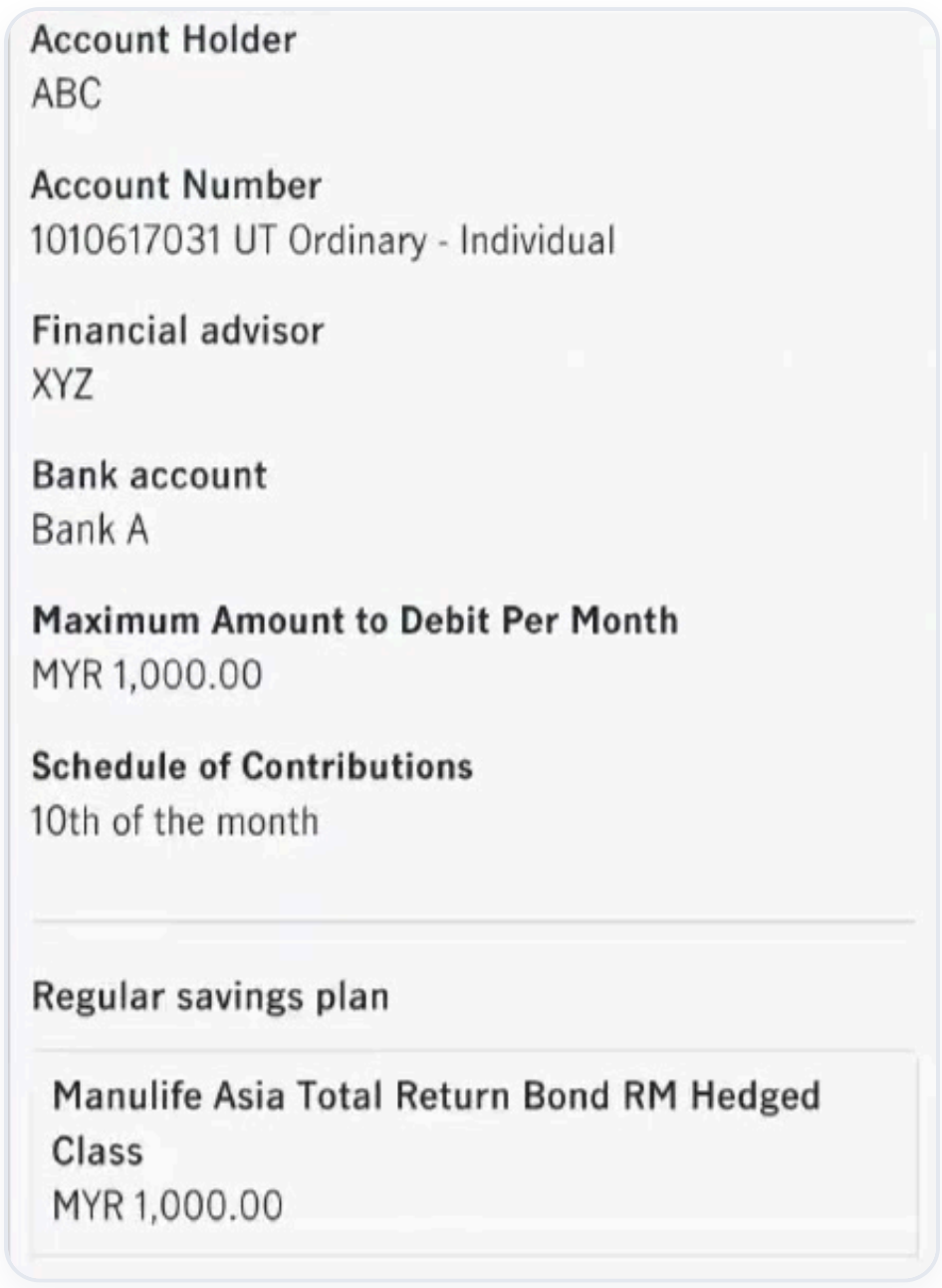


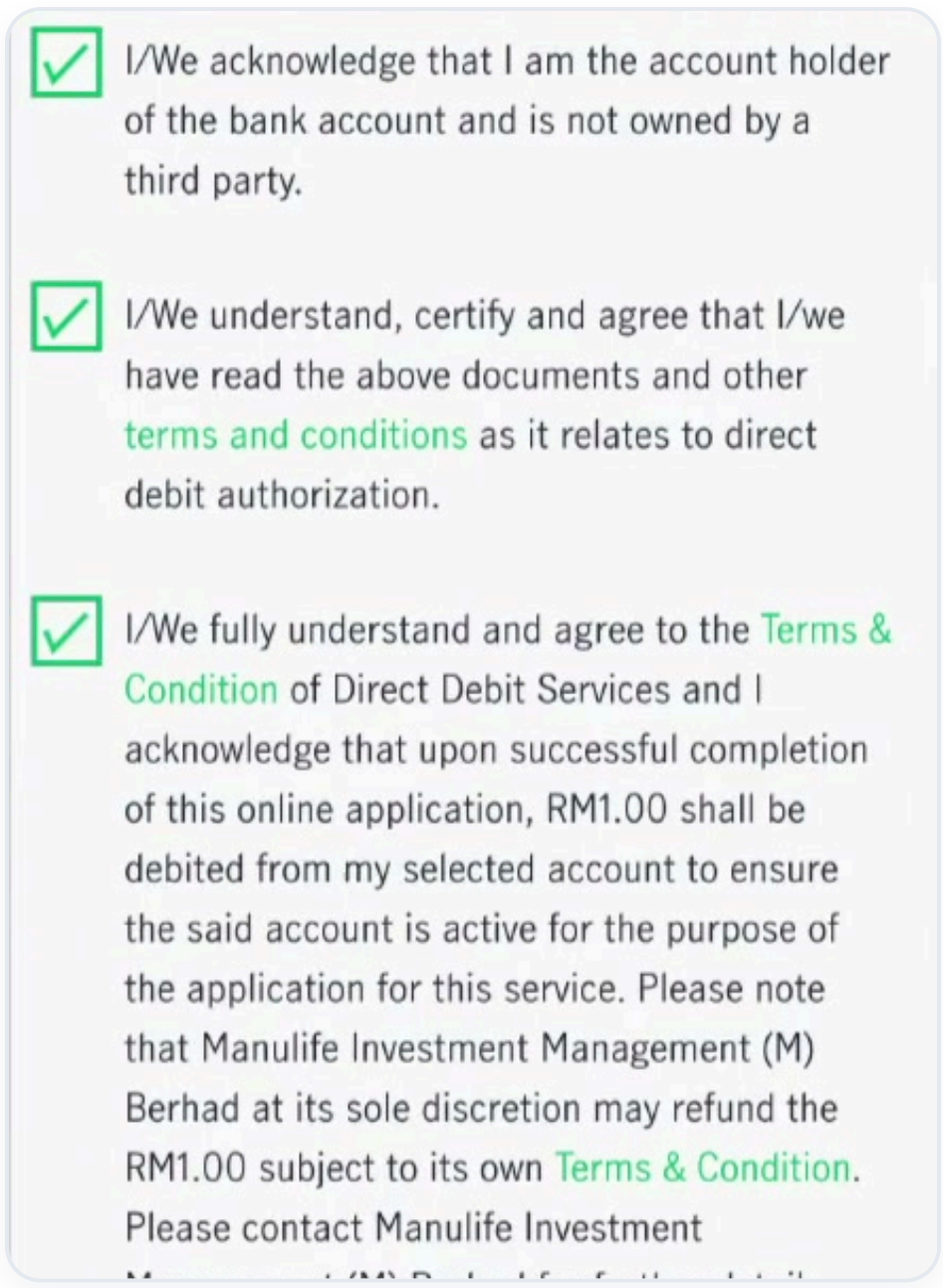
1. Choose your **bank** from the drop-down menu.
2. Select the **maximum amount to debit per month** for this RSP.
3. Pick the **schedule of contributions**: the fixed monthly date the money is deducted.

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STEP 7 OF 9

Review and acknowledge



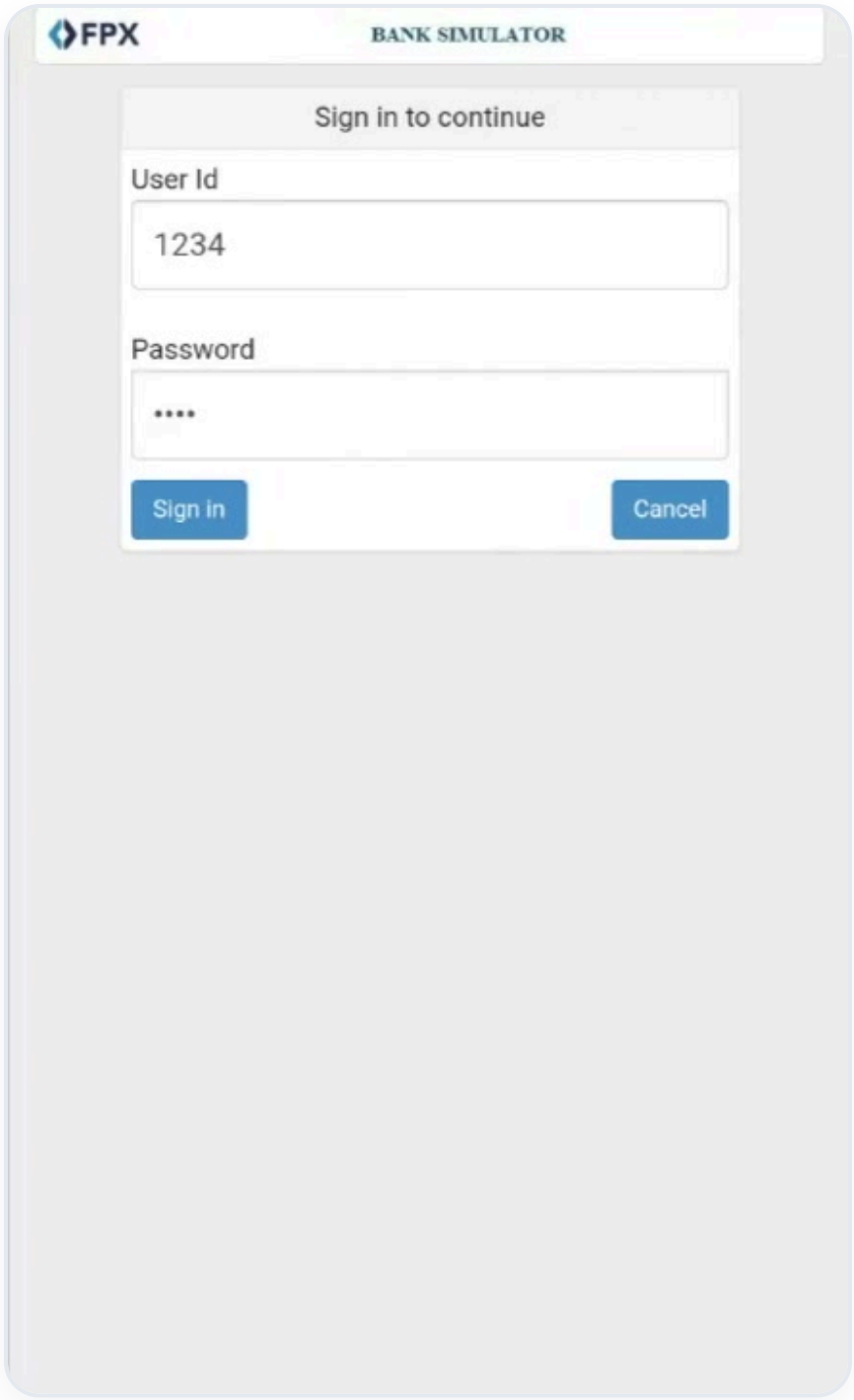


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1. Review your investment details.
2. Read and acknowledge the important notes, terms, disclaimers, notice and declaration.
3. Click **Next** to go to FPX.

STEP 8 OF 9

Approve via FPX

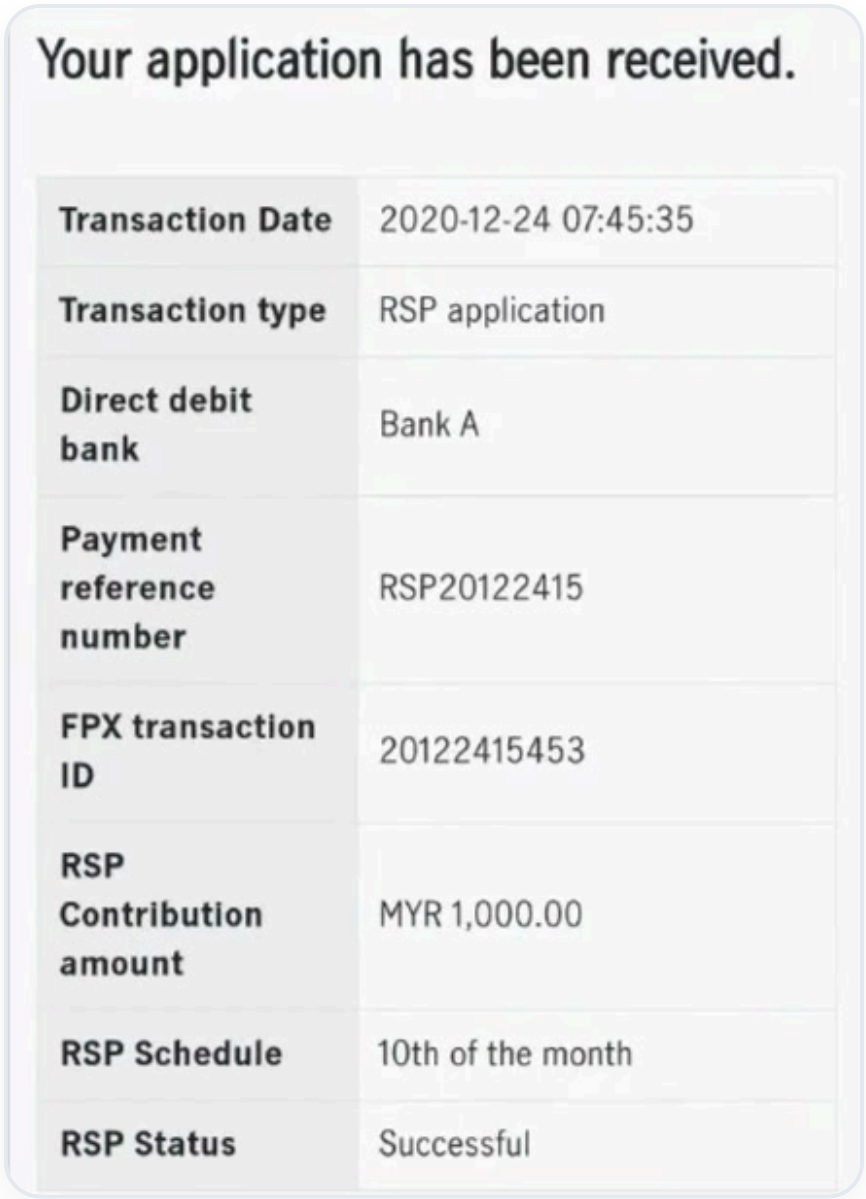


1. Follow the instructions. The screen looks different depending on your bank.
2. **RM1** is deducted to validate your bank account. It may be refunded to your investment account, depending on your bank account status.

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STEP 9 OF 9

Done!



Your application has been received.

Transaction Date	2020-12-24 07:45:35
Transaction type	RSP application
Direct debit bank	Bank A
Payment reference number	RSP20122415
FPX transaction ID	20122415453
RSP Contribution amount	MYR 1,000.00
RSP Schedule	10th of the month
RSP Status	Successful

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1. You'll see a confirmation that your application is received. You and I get an email; you also get an SMS.
2. In about **2 working days**, you'll get an update on your direct debit authorisation status.

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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

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Important notice
This guide is prepared by Muhammad Khairul Khalis of MaxWealth Consultancy to help clients use Manulife iFUNDS. Screens are taken from Manulife Investment Management's official iFUNDS guide videos for illustration; actual screens may differ. It is not an official document of Manulife Investment Management (M) Berhad and is not investment advice. 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.