Application for Value Withdrawal Related

Quick and Convenient!
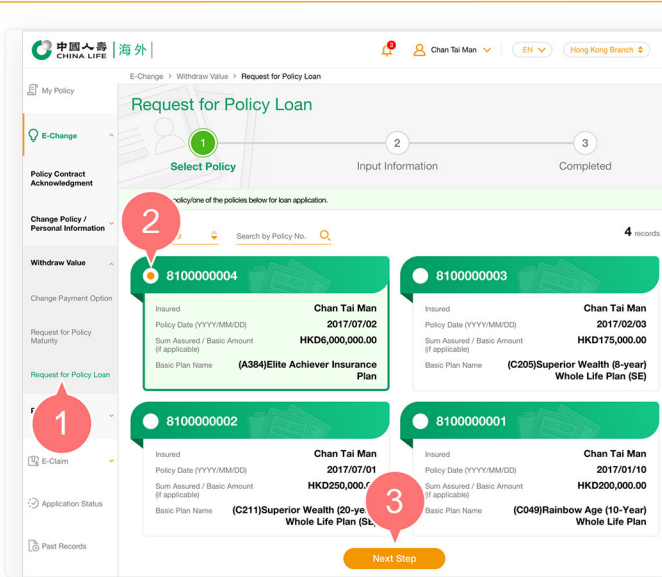
Self Service **Request for Policy Loan**

Please scan the QR code to login Individual Customer Portal
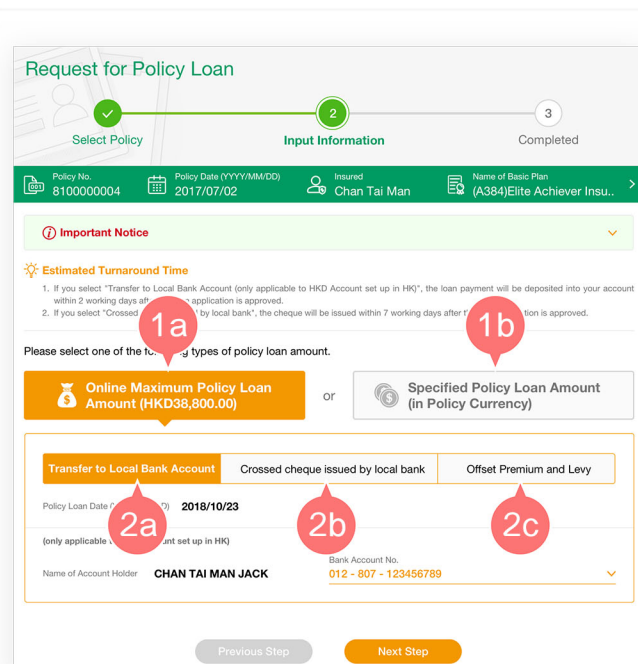
cs.chinalife.com.hk

Step 1 | **Select Policy**

1. After logging into the Individual Customer Portal, select "E-Change" from the main manual. Then, select "Request for Policy Loan" from "Withdraw Value".

2. Select one of the policies by clicking the round button.

3. Click "Next Step" to Step 2.

Step 2 | **Select the options of Policy Loan Amount**

1. Select one of the options of Policy Loan Amount

   1a. Online Maximum Policy Loan Amount

   1b. Specified Policy Loan Amount (in Policy Currency)

2. If select "Online Maximum Policy Loan Amount", please select one of the payment methods below:

   2a. "Transfer to Local Bank Account" (only applicable to HKD Account set up in HK)

   2b. "Crossed cheque issued by local bank"

   2c. "Offset Premium and Levy"

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Please select one of the following types of policy loan amount.

| 💰 Online Maximum Policy Loan Amount (HKD38,800.00) | or | 🪙 **Specified Policy Loan Amount (in Policy Currency)** ③ |

Specified Policy Loan Amount
(The amount must be less than HKD38,800.00)

Input policy loan amount (HKD) ④

| **Transfer to Local Bank Account** | Crossed cheque issued by local bank | Offset Premium and Levy |

④a ④b ④c

Policy Loan Date (YYYY/MM/DD) **2018/10/23**

(only applicable to account set up in HK)

Name of Account Holder **CHAN TAI MAN JACK**

Bank Account No.
012 - 807 - 123456789

Previous Step   Next Step

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⑤

Policy Replacement Declaration

Are you using or do you intend to use some or all of the funds arising from the above-mentioned policy, or any savings made by reducing the premium payable under the above-mentioned policy, in order to fund the new life insurance policy (if any) which is purchased within 12 months prior to the date of this application? For example, such funds or savings may arise from taking out a policy loan from the above-mentioned policy. If yes, such conditions will be considered as Policy Replacement.

Please select one of the following options :

⑤a ☐ Yes
☐ Not yet decided ⑤b
⑤c ☐ No
⑤d ☐ Not applicable (Applicable to those who have not purchased a new life insurance policy in the past 12 months)

Previous Step   Next Step

⑥

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3. If select "Specified Policy Loan Amount (in Policy Currency)".

4. Enter policy loan amount, select one of the payment methods below:

   4a. "Transfer to Local Bank Account" (only applicable to HKD Account set up in HK)

   4b. "Crossed cheque issued by local bank"

   4c. "Offset Premium and Levy"

5. Policy Replacement Declaration，please select one of the following options after reading the declaration:

   5a. Yes

   5b. Not yet decided

   5c. No

   5d. Not applicable (Applicable to those who have not purchased a new life insurance policy in the past 12 months)

6. Click "Next Step".

Step 3

Declaration

currency.
5. I/We provide valid documentation proofs (such as identity document and address proof) to the satisfaction of the Company for the Company to conduct due diligence
on myself/ourselves, the ultimate beneficial owner(s) of the policy (if any) and my/our authorized signatory(ies) (if applicable) pursuant to the Anti-money Laundering and Counter-Terrorist Financing Ordinance, Cap. 615.

Part II Personal Information Collection Statement
I/We confirm that I/we have read and understood the Personal Information Collection Statement (PICS) of China Life Insurance (Overseas) Company Limited. For the latest version of the PICS, it can be downloaded from www.chinalife.com.hk or is made available upon request.

Part III Declaration for Collection of Premium Levy on Individual Life Insurance Policies

I/We hereby acknowledge that: The Company is statutorily required to collect Premium Levy from Policyholder on behalf of the Insurance Authority ("IA") and the collected levy will be fully remitted to IA. IA may take legal proceedings a [...] er in respect of any outstanding Levy as civil debt and may impose pecuniary penalty. For details of the collection of Levy, please refer to th [...]
www.chinalife.com.hk/levy.

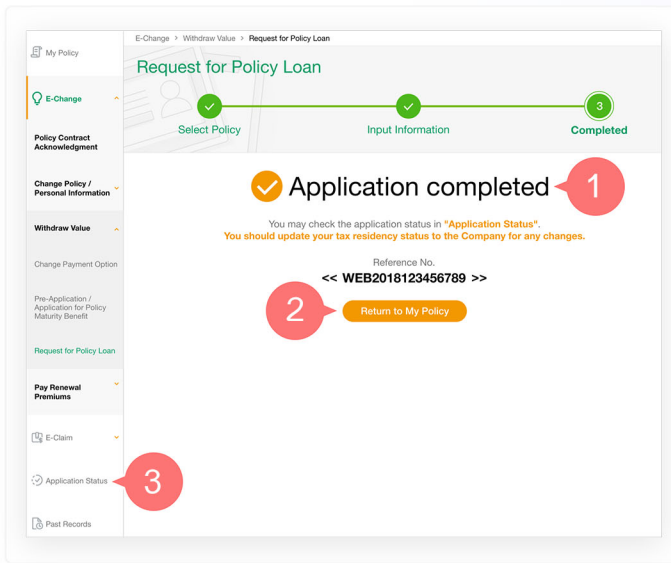Disagree   Agree ①

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② **Do you want to confirm the following information**

Details of the Request for Policy Loan

Policy Loan Amount Option	**Online Maximum Policy Loan Amount**
Policy Loan Amount	**HKD38,800.00**
Policy Loan Date (YYYY/MM/DD)	**2018/10/23**
Payment Method Option	**Transfer to Local Bank Account**
Bank Account No.	**012 - 807 - 123456789**

④ Return to apply   ③ Confirm Submission

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1. After reading the Declaration and Authorization, the Personal Information Collection Statement, and Collection of Premium Levy on Individual Life Insurance Policy, click "Agree" to continue.

2. Preview the page and verify whether the information entered is correct.

3. If the content is correct, click "Confirm Submission".

4. If you need to change the content, click "Return to Change".

Step 4 | Complete the Application

1. You have successfully completed the application procedures / submitted the application.

2. Click "Return to My Policy" to return to homepage, or

3. You may check application progress in "Application Status".

Review all policy information at one go

Check application status anytime

View various types of E-Notice

Submit E-Claim instantly

Change policy information instantly

Receive instant important messages