

Application for Value Withdrawal Related

Quick and Convenient!



Self Service **Change Payment Option**



Please scan the QR code to login Individual Customer Portal

cs.chinalife.com.hk

Step 1 **Select Policy**

The screenshot shows the 'Change Payment Option' page. On the left sidebar, the 'E-Change' menu is highlighted with a red circle 1. The main area displays a list of policies with red circle 2 pointing to the list. At the bottom, the 'Next Step' button is highlighted with a red circle 3. The progress bar at the top shows 'Select Policy' as the current step.

1. After logging into the Individual Customer Portal, select "E-Change" from the main manual. Then, select "Change Payment Option" from "Withdraw Policy Value".
2. Select one of the policies by clicking the round button.
3. Click "Next Step" to Step 2.

Step 2 **Input and Confirm Information**

The screenshot shows the 'Input Information' step. The 'Current Payment Option' is 'Premium Payment'. The 'Updated Payment Option' dropdown is highlighted with a red circle 1. The 'Next Step' button is highlighted with a red circle 2. The progress bar at the top shows 'Input Information' as the current step.

1. Scroll down the list in the "Updated Payment Option" section to select new payment option for dividend/cash coupons/guaranteed annuity payments, including accumulation with interest, cash payment or Premium Payment (where applicable).
2. Click "Submit".

Declaration

I/We hereby request the above change(s) be effected and declare that all statement, information and particulars given herein are accurate, true and complete and are given to the best of my/our knowledge and belief and no material information has been withheld in relation to this request. I/We agree that such change(s) or service(s) will not take effect unless all of the following conditions are met and approved by the Company.

- All required payment and complete supporting documents have been submitted to the Company.
- The request is accepted and approved by the Company during the lifetime and continued insurability of the Insured.
- The information and statement made in this request and in other documents as required by the Company shall form the basis for this policy alteration request and form a part of the policy(ies) unless otherwise specified.
- I/We provide valid documentation proofs (such as identity document and address proof) and authorized signatory(ies) (if applicable) pursuant to the Anti-due diligence on myself/ourselves, the ultimate beneficial owner of the policy (if any) and action of the Company for the Company to conduct due diligence on myself/ourselves, the ultimate beneficial owner of the policy (if any) and.

Are you sure you want to update the following information

Updated Payment Option

Payment Options for dividend	Cash Payment
Payment Options for Cash Coupon/ Guaranteed Annuity Payment	Premium Payment

- After reading the Terms and Conditions, click "Agree" to continue.
- Preview the page and verify whether the information entered is correct.
- If the updated payment option is correct, click "Confirm Submission".
- If you need to change the payment option, click "Return to Change".

Step 3 Completed

Change Payment Option

✔ Select Policy
 ✔ Input Information
 ✔ Completed

✔ Application completed

You may check the application status in "Past Records".

Reference No. << WEB2018123456789 >>

My Policy







- E-Change
- Policy Contract Acknowledgment
- Change Policy / Personal Information
- Withdraw Value
- Change Payment Option
- Pre-Application / Application for Policy Maturity Benefit
- Request for Policy Loan
- Pay Renewal Premiums
- E-Claim
- Application Status
- Past Records

1

2

3

- You have successfully completed the application procedures.
- Click "Return to My Policy" to return to homepage, or
- You may check application progress in "Application Status" or "Past Records".

-  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