

Reviewing and acknowledging the documents for your video-enabled meeting

Thank you for having a video-enabled meeting with your relationship manager or insurance specialist recently. To follow up on the meeting, we will be sending you digital copies of the documents that require your acknowledgement.

This leaflet illustrates step by step on how you can access these documents and acknowledge them online. Please note that these documents will expire after 30 calendar days from the documents' generation date. You will need to log on to HSBC Personal Internet Banking using your Mobile Security Key or Security Device and password before they expire.

Step 1

Please visit the HSBC homepage at www.hsbc.com.hk and click the "**log on**" button at the upper right corner to log onto your Personal Internet Banking.



Step 2

Once you have log onto Personal Internet Banking, please hover over "My Insurance" in the page header as shown below.

K Use the old internet banking			🗸 📴 Hong Kong SAR 🗸	🖂 🖌 Chan Da	a Ming 🗸 🛛 Log off			
HSBC Advance	My banking Account dashboard	Offers & rewards My Get more from HSBC Inve Wea	r investments My H stment & Cards alth mortg	borrowing , loans & lages	y insurance utection & MPF/ORSO			
My accounts	Welcome back Chan Da Ming , you last logged in at 21:33 HKT on 11 May 2020							
<i>i</i> Convert your credit card limit of HKD333,200 into cash at a monthly handling fee as low as 0.37% (APR as low as 8.40%) and get up to HKD1,000 spending credit. T&Cs apply.								
Mong Kong SA	AR ^	HSBC Advance 123-456789-001 Currency (1970)		Ledger ba	lance 🚺 12,345.00			

Select "My sales documents" under the "My Insurance" menu.

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HSBC Advance	My banking Account dashboard	Offers & rewards Get more from HSBC	My investments Investment & Wealth	My borrowing Cards, loans & mortgages	My insurance Protection & MPF/ORSO
Insurance		Health		MPF / ORSO	
My policies		FirstCare Plus Med	ical Insurance	MPF & ORSO ove	erview
My sales documents		Hospital Cash Insu	rance	MPF eStatement	and eAdvice
Explore Insurance		Accident Insurance	2		
Life		Household			
HSBC Term Protector		Home Insurance			
HSBC FirstSave		Fire Insurance			
		Helper Insurance			
Travel		Car Insurance			
Travel insurance					

Step 4

You will see a list of documents that have been sent to you. Each line will represent one document and show the document name, the date and time it was sent to you, the document status and any action by you that may be required.

You will also see any other documents that have been sent to you for insurance sales purposes, digital copies of which you have consented to receiving by signing an agreement during previous in-branch face-to-face sales meetings. These will be shown as "**Signed**". No further action by you will be required for these.

HSBC Internet Banking My	Insurance		■ Hong Kong English ∨	Log off
My Insurance > My sales documents				
My sales documents				
Document name	Time & Date	Document Status	Action	
Financial Planning Report 140520 - 0218924	17:32 on 14 May 2020	Acknowledged 17:43 on 14 May 2020		
	17:32 on 14 May 2020		Read and acknowledge	
⊥ Illustration Proposal for Chan Tai Man	17:32 on 14 May 2020	✓ Signed		
⊥ Illustration Proposal for Chan Tai Man	17:07 on 14 May 2020	Acknowledged 17:26 on 14 May 2020		
	17:07 on 14 May 2020	Acknowledged 17:29 on 14 May 2020		
	17:07 on 14 May 2020		Read and acknowledge	

To acknowledge a document, click the "Read and acknowledge" button against the chosen document.

HSBC Internet Banking	My Insurance		🖸 Hong Kong 🛛 English 🗸	Log off
My Insurance > My sales documents				
My sales documents				
Document name	Time & Date	Document Status	Action	
Financial Planning Report 140520 - 0218924	17:32 on 14 May 2020	Acknowledged 17:43 on 14 May 2020		
	17:32 on 14 May 2020		Read and acknowledge]
🛃 Illustration Proposal for Chan Tai Man	17:32 on 14 May 2020	✓ Signed		
🛃 Illustration Proposal for Chan Tai Man	17:07 on 14 May 2020	Acknowledged 17:26 on 14 May 2020		
Financial Planning Report 140520 - 0218922	17:07 on 14 May 2020	Acknowledged 17:29 on 14 May 2020		
	17:07 on 14 May 2020		Read and acknowledge]

After opening a document, you can review it in detail to ensure you understand the key information before proceeding with the acknowledgment. We suggest you read those key sections that normally require your signature as each of these will be listed against a checkbox in the next step. To provide sufficient time for you to review the document and ensure the information it contains is accurate and clear, the "Acknowledge" button will not be active for 2 minutes after opening. You can check the progress by scrolling to the end of the document where the "Acknowledge" button is located along with the countdown timer. You can close the document at any time by clicking the "Close" button.



After 2 minutes, the button will become active as shown below, at which point you can click "**Acknowledge**" to proceed.

	Page 頁次11.	/11	ļ
	Close	Acknowle	edae

Step 5

Once you have clicked the "Acknowledge" button, you will be presented with a list of the key declarations that would normally require your signature. Each declaration is accompanied by the checkbox that you are required to check to confirm you have read and understood the declaration. You are required to **check all of these boxes** before you can confirm your acknowledgement. The "Confirm" button will not be active until all checkboxes are checked. You can click "Cancel" to return to the document.

Once you have checked all the checkboxes, the "Confirm" button will become active. To complete your acknowledgment of the document, just press the "**Confirm**" button. To exit without acknowledging, click the "Cancel" button.

Insurance Application for CHAN, TAI MAN,Mortgage Protection Plan,VS0038930 I confirm and declare I have read and understood all the information in this Life Insurance Application form, including all those sections checked below	
that require my signature, and hereby authorize you to submit this application. Please check all relevant boxes before clicking confirm.	



Step 6

Once you have clicked "Confirm", the screen will return to the list of documents. The document's status will now be displayed with the date and time you acknowledged it. You can now repeat the process for any other documents requiring your acknowledgment.

HSBC	Internet Banking	My Insurance			 Hong Kong 	English 🗸	Log off	^
My Insurance > My sa	les documents							
My sales do	ocuments							
Document name		Time & Date	1	Document Status	Action			
Financial Planr 0218924	ning Report 140520	17:32 on 14 May 2020		Acknowledged 17:43 on 14 May 2020				
Insurance App MAN,Mortgag Plan,VS003893	lication for CHAN, T e Protection 30	AI 17:32 on 14 May 2020		Acknowledged 17:59 on 15 May 2020)			
⊥ Illustration Pro	posal for Chan Tai M	Man 17:32 on 14 May 2020		✓ Signed				l
⊥ Illustration Pro	posal for Chan Tai M	Man 17:07 on 14 May 2020		Acknowledged 17:26 on 14 May 2020				
Financial Planr 0218922	ning Report 140520	17:07 on 14 May 2020		Acknowledged 17:29 on 14 May 2020				
Insurance App MAN,Mortgag Plan,VS003892	lication for CHAN, T e Protection 25	AI 17:07 on 14 May 2020			Read	and acknowledge		~

Step 7

You can also download a copy of the document by clicking the download icon 上 next to the document name.

HSBC Internet Banking My	/ Insurance		 Hong Kong 	English 🗸	Log off
My Insurance > My sales documents					
My sales documents					
Document name	Time & Date	Document Status	Action		
↓ Financial Planning Report 140520 - 0218924	17:32 on 14 May 2020	Acknowledged 17:43 on 14 May 2020			
Insurance Application for CHAN, TAI MAN,Mortgage Protection Plan,VS0038930	17:32 on 14 May 2020	Acknowledged 17:59 on 15 May 2020			
🛓 Illustration Proposal for Chan Tai Man	17:32 on 14 May 2020	✓ Signed			
🕁 Illustration Proposal for Chan Tai Man	17:07 on 14 May 2020	Acknowledged 17:26 on 14 May 2020			
Financial Planning Report 140520 - 0218922	17:07 on 14 May 2020	Acknowledged 17:29 on 14 May 2020			
↓ Insurance Application for CHAN, TAI MAN,Mortgage Protection Plan,VS0038925	17:07 on 14 May 2020		Read a	and acknowledge	

May 2020

Issue by HBSC Life (International) Limited (Incorporated in Bermuda with limited liability)