

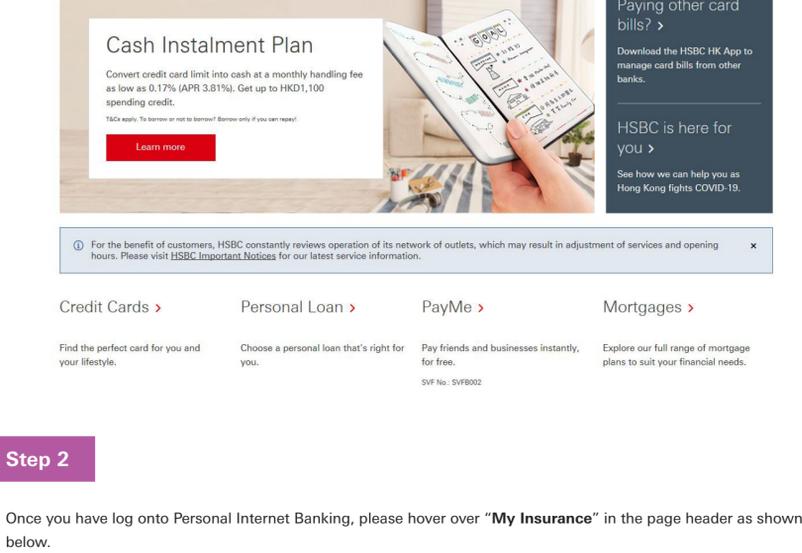
Reviewing and acknowledging the documents for your video-enabled meeting

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.

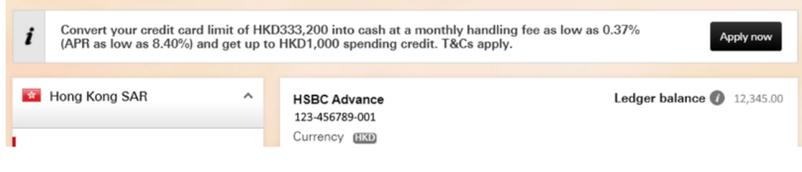
Step 1

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.



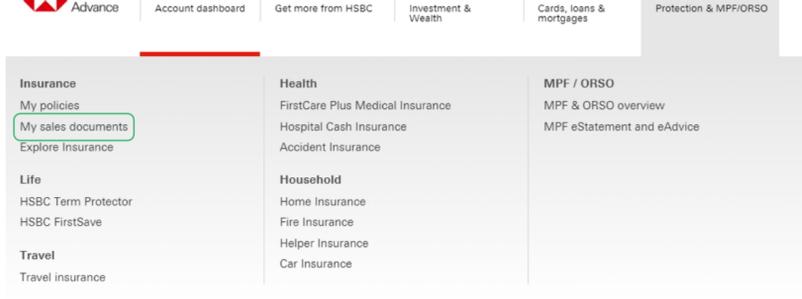
Step 2

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



Step 3

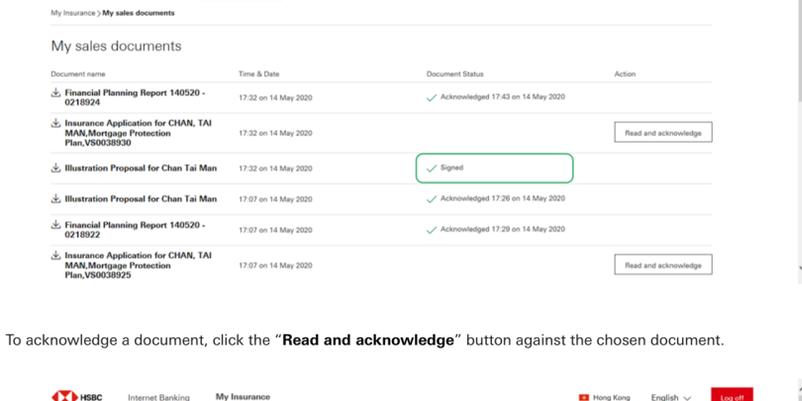
Select "My sales documents" under the "My Insurance" menu.



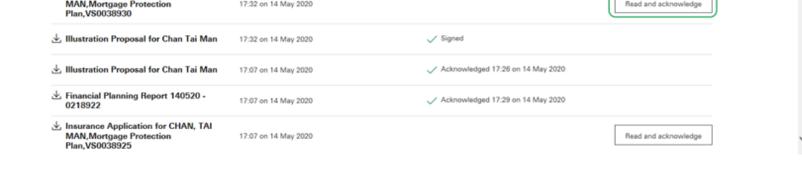
Step 4

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.

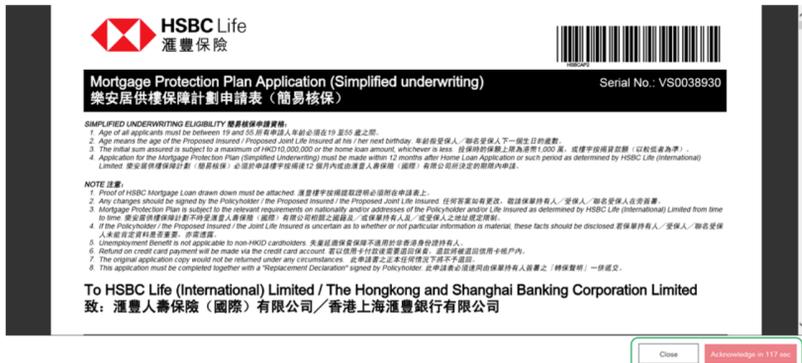
You will also see any other documents that have been sent to you for insurance sales purposes, digital copies of which you have consented to receiving by signing an agreement during previous in-branch face-to-face sales meetings. These will be shown as "Signed". No further action by you will be required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



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



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.



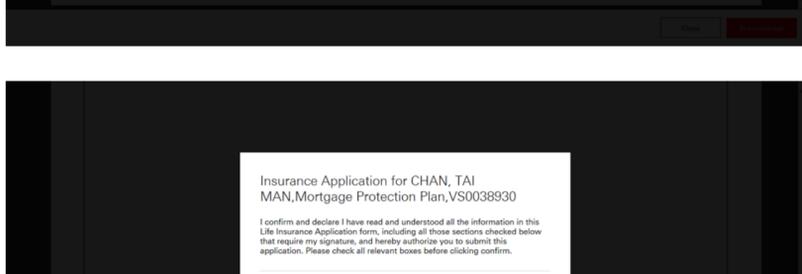
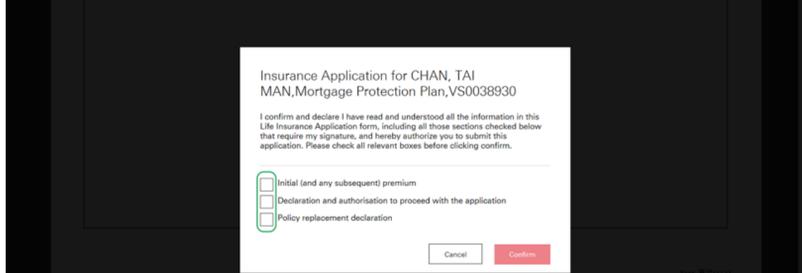
After 2 minutes, the button will become active as shown below, at which point you can click "Acknowledge" to proceed.



Step 5

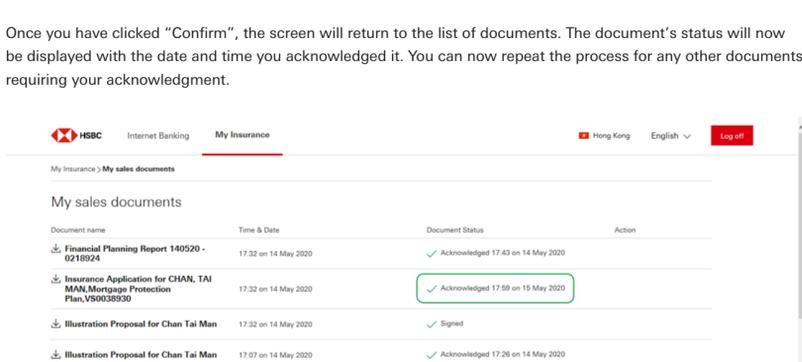
Once you have clicked the "Acknowledge" button, you will be presented with a list of the key declarations that would normally require your signature. Each declaration is accompanied by the checkbox that you are required to check to confirm you have read and understood the declaration. You are required 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 acknowledgement of the document, just press the "Confirm" button. To exit without acknowledging, click the "Cancel" button.



Step 6

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



Step 7

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

