

#### **Customer Portal User Guide**

### **Application for Value Withdrawal Related** Quick and Convenient!



Please scan the QR code to login Individual Customer Portal

cs.chinalife.com.hk

# Self Service

## Pre-Application / Application for Policy Maturity Benefit

#### Attention :

- 1. "Pre-Application / Application for Policy Maturity Benefit" of the Customer Portal is not applicable to policies held by an assigness or bankrupt, the Policyholder must submit the application via physical form.
- 2. Before paying the Policy Maturity Benefit, the Company requires to ensure that the identity document on our records remain current and relevant. If the Policyholder has any updated identity document, it is required to proivde a copy of the latest and valid identify document to the Company.

#### **Select Policy** Step 1



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

#### Step 2

## Select Payment Methods



Select one of the following options:

1a. Full Amount

- 1b. Specified Amount (Specified Amount and Remaining Balance)
- 2. If select "Full Amount", please select one of the payment methods below:

2a. "Premium Payment"

- 2b. "Crossed cheque issued by local bank"
- 3. Click "Next Step".



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- If you select "Specified Amount (Specified Amount and Remaining Balance)", at "Specified amount to offset premium":
  - **4a.**Scroll down the list to select the "Payment Currency" ; and
  - 4b.Enter "Specified Amount" ; and
  - **4c.** Select one of the policies from the list to offset premium.
- 5. For the application procedures of the "Remaining Balance", please refer to 2a to 2b.
- 6. Click "Next Step".

#### Step 3



- 1. After reading the Declaration and Authorization, and the Personal Information Collection Statement, 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" or "Past Records".



Review all policy information at one go

Submit E-Claim instantly



Check application status anytime

Change policy information instantly



View various types of E-Notice

3/3

Receive instant important messages