Application for Change of Policy or Personal Information

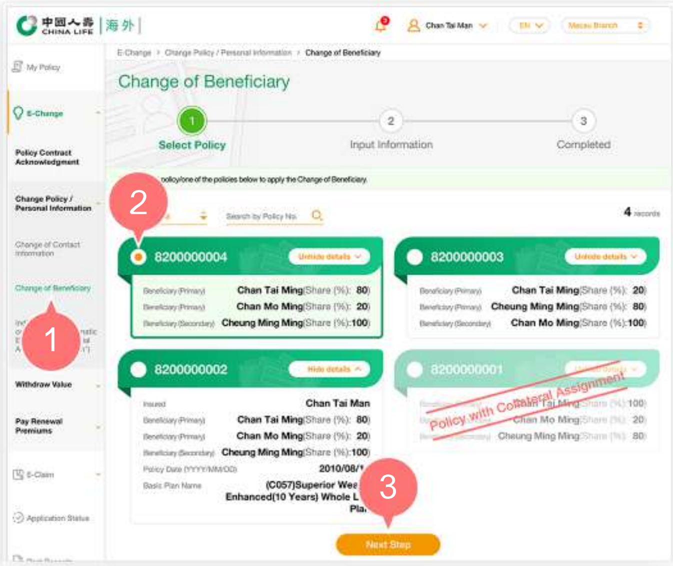
Ensure information is timely updated !

Self Service **Change of Beneficiary**

Please scan the QR code to login Individual Customer Portal

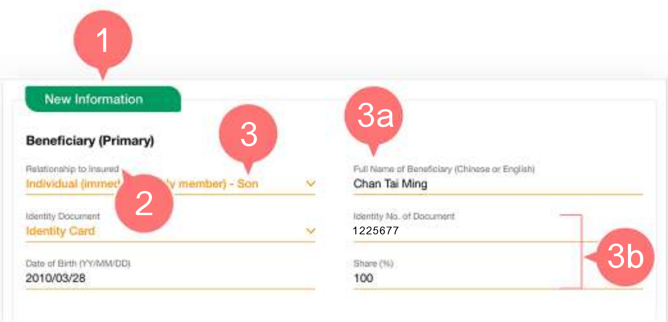
cs.chinalife.com.hk

Step 1 Select Policy



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

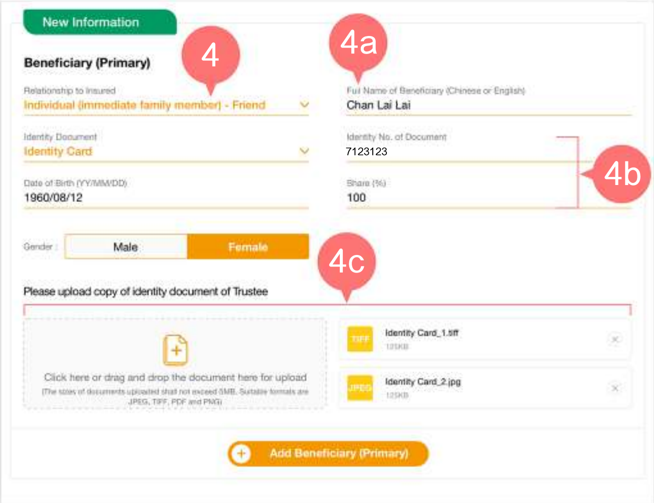
Step 2 Input Information

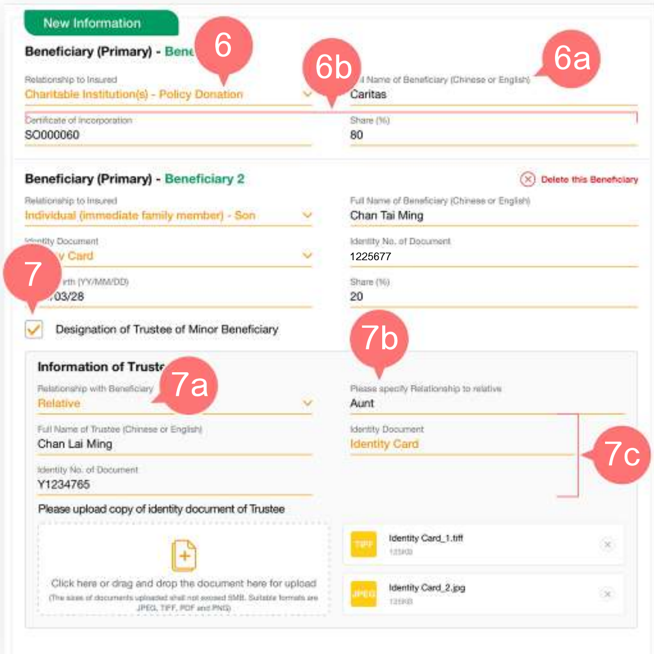


1. Select the beneficiary information which you need to change in the "New Information" section.
2. Scroll down the "Relationship to Insured" list to select relationship between the Insured and the Beneficiary.
3. If the selected "Relationship to Insured" is "Individual (immediate family member)":

   3a. Enter the Full Name of Beneficiary in Chinese or English.

   3b. Select the type of "Identity Document" and then enter "Identity No. of Document" , "Date of Birth (YY/MM/DD)" and "Share".





4. If the selected "Relationship to Insured" is "Individual (non-immediate family member)":

   4a. Enter the Full Name of Beneficiary (Chinese or English).

   4b. Select the type of "Identity Document" and then enter "Identity No. of Document","Date of Birth" ,"Gender" and "Share".

   4c. Upload the proof of identity document of the "New Beneficiary".

5. If the selected "Relationship to Insured" is "Individual (Inheritance)":

   5a. Enter "Share" only.

6. If the selected "Relationship to Insured" is "Charitable Institution(s)":

   6a. Enter the Full Name of Beneficiary (i.e. name of charitable institution/ organization) in Chinese or English.

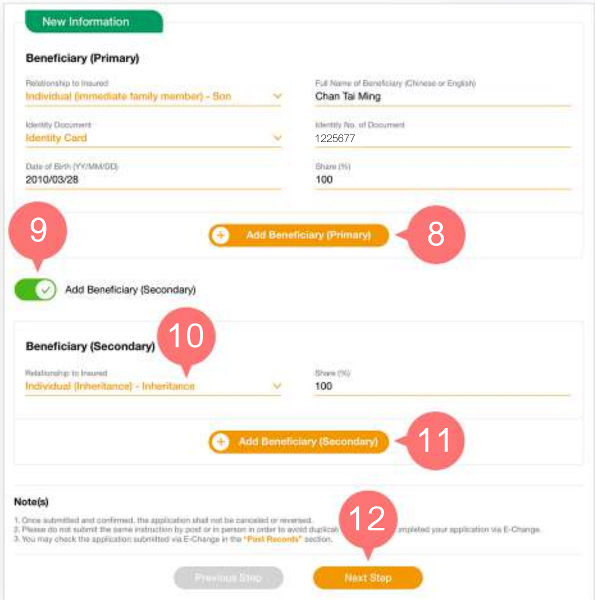
   6b. Enter the number of "Certificate of Incorporation" and "Share".

7. If the new Beneficiary is under aged 18, you may select "Designation of Trustee of Minor Beneficiary".

   7a. Enter "Relationship with Beneficiary" first.

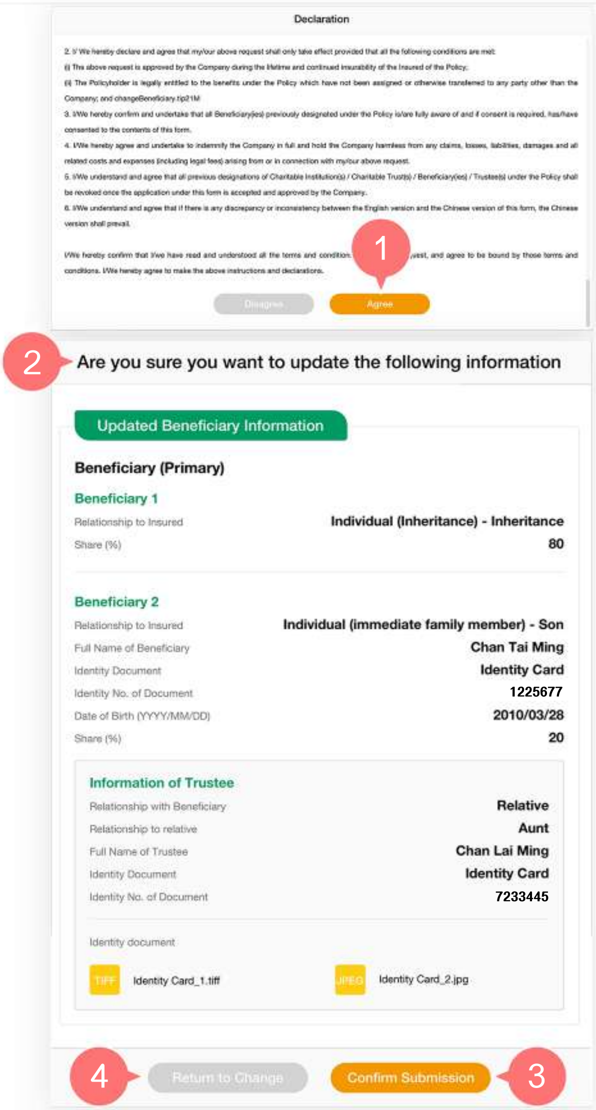
   7b. If the selected "Relationship with Beneficiary" is "non-immediate family member", you must specify the relationship to relative.

   7c. Enter "Relationship with Beneficiary" ,"Full name of Trustee (Chinese or English)", type of "Identity Document","Identity No. of Document" and then upload the proof of Identity Document of the "New Beneficiary".



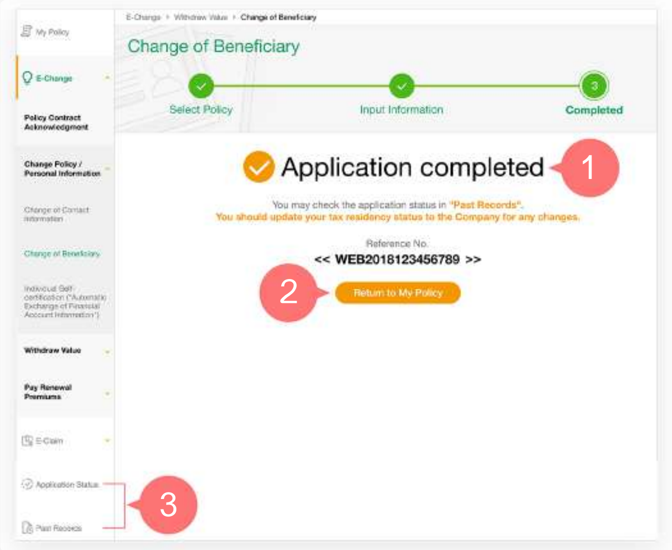
8. Select "Add Beneficiary (Primary)" to add other primary beneficiary (if applicable).
9. Drag the button to the right to add "Beneficiary (Secondary)" (if applicable).
10. For the application procedures of "Beneficiary (Secondary)", please refer to points 3 to 7 under Step 2.
11. Select "Add Beneficiary (Secondary)" to add other secondary beneficiary (if applicable).
12. Click "Next Step" to Step 3.

Step 3 Confirm Information



1. Click "Agree" to confirm that you have read and agreed to the Declaration.
2. Preview the page and verify whether the information entered is correct.
3. If the updated Beneficiary is correct, click "Confirm Submission".
4. If you need to revise information, click "Return to Apply".

Step 4 Completed



1. You have successfully completed the application procedures/submitted the application.
2. Click "Return to My Policy" to return to homepage, or
3. Select "Application Status" / "Past Records" from the main manual to check relevant application records.