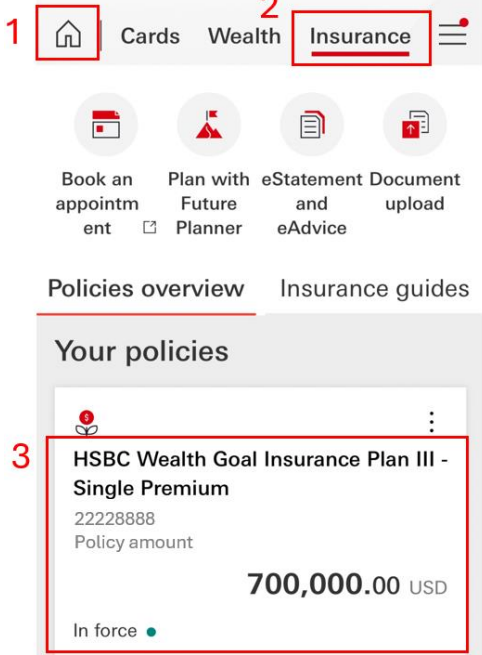
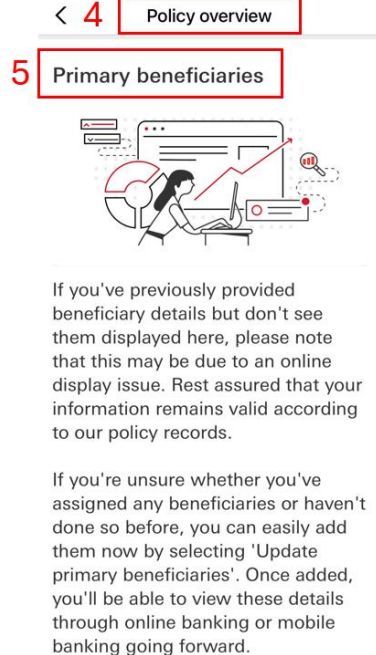
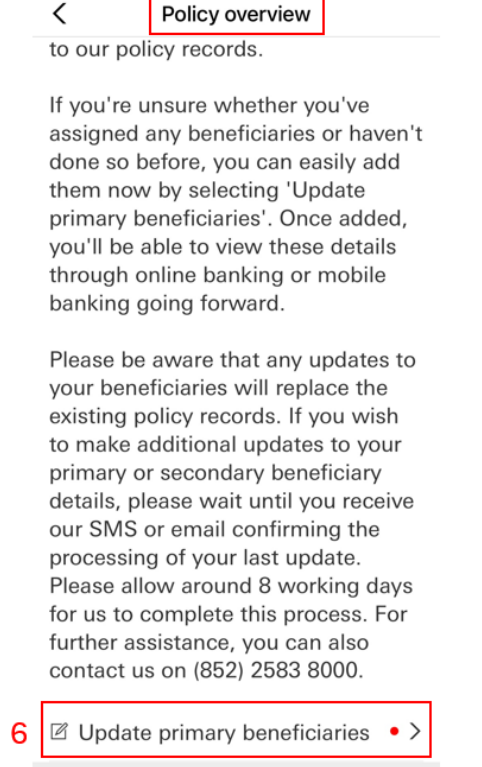
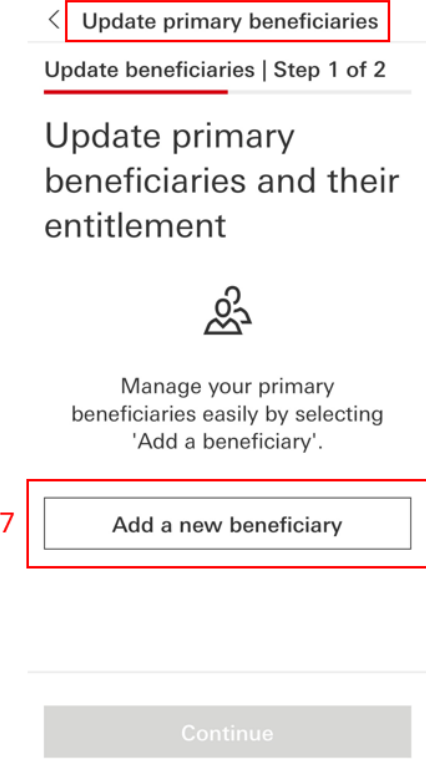


## How To Add Beneficiary Details – HSBC App

<p>1. Home Page 2. Insurance Page 3. Select the insurance plan</p>	<p>4. Policy overview 5. Primary beneficiaries</p>
	 <p>If you've previously provided beneficiary details but don't see them displayed here, please note that this may be due to an online display issue. Rest assured that your information remains valid according to our policy records.</p> <p>If you're unsure whether you've assigned any beneficiaries or haven't done so before, you can easily add them now by selecting 'Update primary beneficiaries'. Once added, you'll be able to view these details through online banking or mobile banking going forward.</p>
<p>6. Update Primary beneficiaries</p>	<p>7. Add a new beneficiary</p>
 <p>to our policy records.</p> <p>If you're unsure whether you've assigned any beneficiaries or haven't done so before, you can easily add them now by selecting 'Update primary beneficiaries'. Once added, you'll be able to view these details through online banking or mobile banking going forward.</p> <p>Please be aware that any updates to your beneficiaries will replace the existing policy records. If you wish to make additional updates to your primary or secondary beneficiary details, please wait until you receive our SMS or email confirming the processing of your last update. Please allow around 8 working days for us to complete this process. For further assistance, you can also contact us on (852) 2583 8000.</p>	 <p>Update primary beneficiaries and their entitlement</p> <p>Manage your primary beneficiaries easily by selecting 'Add a beneficiary'.</p>

<p>9. Update beneficiary details  <i>Note: Please provide the full English name(s) of the beneficiary(ies) as shown on their identification documents.</i></p> <p>10. Add beneficiary</p>	<p><b>**Sample**</b></p>
<div> <div>×</div> <div>Add a new beneficiary</div> </div> <div>9</div> <div>Beneficiary details</div> <div>Relationship to life insured</div> <div>Please select</div> <div>First name</div> <div>Enter the beneficiary's first name</div> <div>Last name</div> <div>Enter the beneficiary's last name</div> <div>Identity details</div> <div>Please select</div> <div>10</div> <div>Add beneficiary</div>	

×

Add a new beneficiary

Relationship to life insured

Daughter

First name

Siu Man

Last name

Chan

Identity details

Passport

Passport number

ABC12345

Add beneficiary

<div>14. Review details</div> <div> <div> <div>&lt; Update primary beneficiaries</div> <div>Review   Step 2 of 2</div> </div> <div> <div>14</div> <div>Now review the details before submitting your instruction</div> </div> <div> <div>Instruction summary</div> <div> <div>Your policies</div> <div>           HSBC Wealth Goal Insurance Plan III - Single Premium            (Policy number: 22228888)         </div> </div> <div> <div>Your instruction</div> <div>Change of primary beneficiary</div> </div> <div> <div>Primary beneficiaries</div> <div></div> </div> <div>Submit</div> </div> </div>	<div>15. Read through Declarations</div> <div> <div> <div>&lt; Update primary beneficiaries</div> <div>Your instruction      Change of primary beneficiary</div> </div> <div>Primary beneficiaries</div> <div> <div> <div>Siu Man Chan (Daughter)</div> <div>100%</div> </div> <div>Passport number: ABC12345</div> </div> <div> <div>15</div> <div>Declarations</div> </div> <div> <ul style="list-style-type: none"> <li>I confirm to update my beneficiaries for my selected life insurance policies underwritten by HSBC Life (International) Limited, and understand that these updates will supersede any beneficiaries details which I have previously submitted.</li> <li>I confirm that where I have provided data about any another person: (a) I</li> </ul> </div> <div>Submit</div> </div>
<div>16. Click "Declare"</div> <div>17. Submit</div> <div> <div> <div>&lt; Update primary beneficiaries</div> <div> <div>Collection Statement ("PICS"), (b) I have provided a copy of the PICS (issued by HSBC Life (International) Limited) to all such persons and (c) I have obtained the prior consent of all such persons regarding the collection, use and sharing of personal data (in accordance with PICS) before I transfer the personal data of any other persons to HSBC Life (International) Limited.</div> </div> <div> <ul style="list-style-type: none"> <li>I acknowledge and agree only a restricted scope of services for my life insurance policy can and shall be provided to me during any time when I am located in the US or some other jurisdictions outside Hong Kong, either temporarily or permanently, when giving out any instruction for such services to HSBC Life (International) Limited.</li> </ul> </div> <div> <div>16</div> <div> <input checked="" type="checkbox"/> I declare and agree to the statements under the Declarations section.         </div> </div> <div> <div>17</div> <div>Submit</div> </div> </div> </div>	<div>18. Confirmation Page</div> <div> <div> <div>✕ Update primary beneficiaries</div> <div> <div>✓</div> <div>Thank you</div> <div>We've received your instruction.</div> </div> </div> <div> <div>Reference number</div> <div>LF21436484P0004</div> </div> <div> <div>Instruction summary</div> <div> <div>Your policies</div> <div>           HSBC Wealth Goal Insurance Plan III - Single Premium            (Policy number: 22228888)         </div> </div> <div> <div>Your instruction</div> <div>Change of primary beneficiary</div> </div> <div>Done</div> </div> </div>

## How To Add Beneficiary Details – Online Banking

1. My insurance
2. Policy details
3. Select the insurance plan and 4. Loop down

1. My insurance

2. Policy details

3. Select the insurance plan and 4. Loop down

HSBC Account summary My insurance Hong Kong English Log off

1 My insurance 2 Policy details

3

Policy effective from 09 Sep 2022

**HSBC Wealth Select Protection Linked Plan**

USD · Savings or investment-linked · Unit-linked life

Policy number <b>22228888</b>	Sum insured ⓘ <b>720,000.00 USD</b>	Life insured ⓘ <b>TAI MEN TAI MEN TAI MEN TAI MEN</b>	Policy currency <b>USD</b>	Total fund balance <b>57,695.92 USD</b>
----------------------------------	--	--	-------------------------------	--

Update your personal contact details Make a claim ⓘ Update payment instruction ⓘ Switch investment choices ⓘ

Change upcoming premium and bonus allocation ⓘ Make a withdrawal ⓘ View instruction history ⓘ Document upload ⓘ

View eStatements and eAdvices ⓘ Update insurance statement and advice preference ⓘ Contact us ⓘ Update beneficiaries ⓘ

Payment information

Monthly premium ⓘ  
**4,000.00 USD**

The levy and discount (if any) haven't been included in the stated amount.

Payment mode ⓘ  
**Monthly**

4

5. Beneficiaries
6. Update primary beneficiaries

5 Beneficiaries

6 Update primary beneficiaries >


If you've previously provided beneficiary details but don't see them displayed here, please note that this may be due to an online display issue. Rest assured that your information remains valid according to our policy records.

If you're unsure whether you've assigned any beneficiaries or haven't done so before, you can easily add them now by selecting 'Update primary beneficiaries'. Once added, you'll be able to view these details through online banking or mobile banking going forward.

Please be aware that any updates to your beneficiaries will replace the existing policy records. If you wish to make additional updates to your primary or secondary beneficiary details, please wait until you receive our SMS or email confirming the processing of your last update. Please allow around 8 working days for us to complete this process. For further assistance, you can also contact us on (852) 2583 8000.


## 7. Update primary beneficiaries and their entitlement

### 8. Add a beneficiary

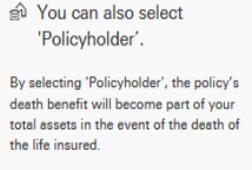
 Account summary My insurance Hong Kong English [Log off](#)

Update beneficiaries | Step 1 of 2

## 7 Update primary beneficiaries and their entitlement

 **Primary beneficiaries**  
Manage your primary beneficiaries easily by selecting 'Add a beneficiary'.

### 8 + Add a beneficiary




You can also select 'Policyholder'.

By selecting 'Policyholder', the policy's death benefit will become part of your total assets in the event of the death of the life insured.

[< Back](#) [Continue](#)

## 9. Fill in all information

*Note: Please provide the full English name(s) of the beneficiary(ies) as shown on their identification documents.*


 Account summary My insurance Hong Kong English [Log off](#)

Update beneficiaries | Step 1 of 2

## Update primary beneficiaries and their entitlement

Beneficiaries (1)

### 9

 **Beneficiary 1**

Percentage of entitlement

%

Relationship to life insured

First name

Last name

Please select

Enter the beneficiary's first name

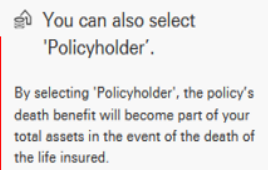
Enter the beneficiary's last name

Identity details

Please select

Enter identity number

[+ Add a beneficiary](#)



You can also select 'Policyholder'.

By selecting 'Policyholder', the policy's death benefit will become part of your total assets in the event of the death of the life insured.


**\*\*Sample\*\***

## 10. Continue

Update beneficiaries | Step 1 of 2

### Update primary beneficiaries and their entitlement

#### Beneficiaries (1)

 Beneficiary 1

Percentage of entitlement

100 %

Relationship to life insured

Daughter

First name

Siu Man

Last name

Chan

Identity details

Passport

Passport

ABC12345

You can also select 'Policyholder'.  
By selecting 'Policyholder', the policy's death benefit will become part of your total assets in the event of the death of the life insured.

+ Add a beneficiary

< Back

10

Continue

## 11. Review for the details

## 12. Read through "Declarations"

## 13. Click "declare"

## 14. Submit



Account summary My insurance

Hong Kong English

Log off

Review | Step 2 of 2

## 11 Now review the details before submitting your instruction

### Instruction summary

Your policies HSBC Bright Income Insurance Plan (3P11to99) (Policy number: 21523769)

Your instruction Change of primary beneficiary

### Primary beneficiaries

Name	Relationship to life insured	Identity details	Percentage of entitlement
Siu Man Chan	Daughter	ABC12345	100%

## 12 Declarations

- I confirm to update my beneficiaries for my selected life insurance policies underwritten by HSBC Life (International) Limited, and understand that these updates will supersede any beneficiaries details which I have previously submitted.
- I confirm that where I have provided data about any another person: (a) I have informed all such persons how HSBC Life (International) Limited will collect, use and share their data as explained in [Personal Information Collection Statement \("PICS"\)](#), (b) I have provided a copy of the PICS (issued by HSBC Life (International) Limited) to all such persons and (c) I have obtained the prior consent of all such persons regarding the collection, use and sharing of personal data (in accordance with PICS) before I transfer the personal data of any other persons to HSBC Life (International) Limited.
- I acknowledge and agree only a restricted scope of services for my life insurance policy can and shall be provided to me during any time when I am located in the US or some other jurisdictions outside Hong Kong, either temporarily or permanently, when giving out any instruction for such services to HSBC Life (International) Limited.

13 ☒ I declare and agree to the statements under the Declarations section.

< Back

14

Submit

## 15. Confirmation Page

✓ We've received your instruction.

# Change of beneficiary

### Instruction summary

Reference number: LF22225301P0001

 Print

#### Instruction details

Your policies

HSBC Wealth Select Protection Linked Plan (Policy number: 22228888)

Your instruction

Change of primary beneficiary

Name of primary beneficiaries

Percentage of entitlement

Siu Men Chan (Daughter)

100%

**i** Please make sure your contact details are up to date. We'll contact you with your contact details in our records.

Mobile phone number

861501019\*\*\*\*

Correspondence address

Hong Kong Island, HK

Email address

Please update your email address

[Update your personal contact details >](#)

## What to expect now

1

#### Acknowledgement communication

We'll send an SMS to your mobile phone number in our record.

2

#### Confirmation communication

If we successfully process your instruction, we'll send you an SMS or email to your mobile phone number or email address in our record.

[Return to Policy details](#)