

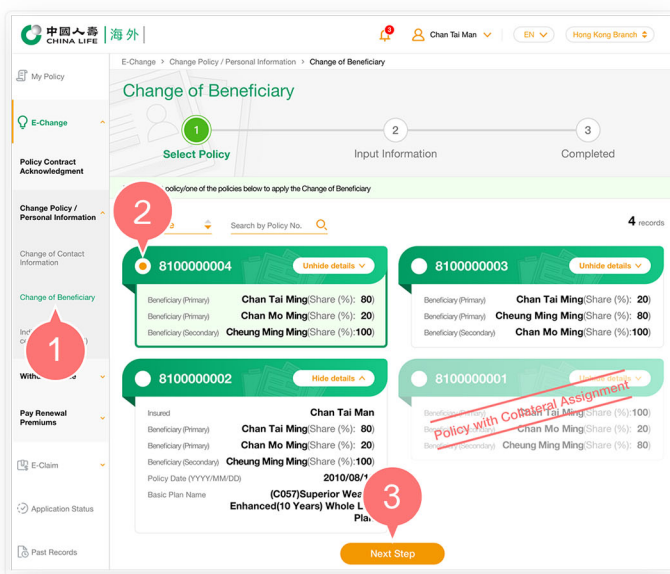
## Application for Change of Policy or Personal Information

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".

**New Information**

**Beneficiary (Primary)**

Relationship to Insured  
Individual (immediate family member) - Friend

Full Name of Beneficiary (Chinese or English)  
Chan Lai Lai

Identity Document  
Identity Card

Identity No. of Document  
Y1765432

Date of Birth (YY/MM/DD)  
1960/08/12

Share (%)  
100

Gender:  Male  Female

Please upload copy of identity document of Trustee

Identity Card\_1.tiff 125KB

Identity Card\_2.jpg 125KB

**Add Beneficiary (Primary)**

**New Information**

**Beneficiary (Primary)**

Relationship to Insured  
Individual (Inheritance) - Inheritance

Share (%)  
100

**Add Beneficiary (Primary)**

**New Information**

**Beneficiary (Primary) - Beneficiary 1**

Relationship to Insured  
Charitable Institution(s) - Policy Donation

Full Name of Beneficiary (Chinese or English)  
Caritas Hong Kong

Certificate of Incorporation  
S0000060

Share (%)  
80

Check the name of Charitable institutions approved by HK government: [https://www.ird.gov.hk/eng/tax/ach\\_index.htm](https://www.ird.gov.hk/eng/tax/ach_index.htm)  
Check the Companies Registry's number of Charitable institutions: <https://www.icris.gov.hk/cscl>

**Beneficiary (Primary) - Beneficiary 2**

Relationship to Insured  
Individual (immediate family member) - Son

Full Name of Beneficiary (Chinese or English)  
Chan Tai Ming

Identity Document  
Identity Card

Identity No. of Document  
Y1234567

Date of Birth (YY/MM/DD)  
03/28

Share (%)  
20

Designation of Trustee of Minor Beneficiary

**Information of Trustee**

Relationship with Beneficiary  
Relative

Please specify Relationship to relative  
Aunt

Full Name of Trustee (Chinese or English)  
Chan Lai Ming

Identity Document  
Identity Card

Identity No. of Document  
Y1234765

Please upload copy of identity document of Trustee

Identity Card\_1.tiff 125KB

Identity Card\_2.jpg 125KB

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".



New Information

**Beneficiary (Primary)**

Relationship to Insured  
Individual (immediate family member) - Son

Full Name of Beneficiary (Chinese or English)  
Chan Tai Ming

Identity Document  
Identity Card

Identity No. of Document  
Y1234567

Date of Birth (YY/MM/DD)  
2010/03/28

Share (%)  
100

+ Add Beneficiary (Primary)

**Beneficiary (Secondary)**

Relationship to Insured  
Individual (Inheritance) - Inheritance

Share (%)  
100

+ Add Beneficiary (Secondary)

**Notes**

1. Once submitted and confirmed, the application shall not be cancelled or reversed.  
2. Please do not submit the same instruction by post or in person in order to avoid duplicate applications. If you have already completed your application via E-Change.  
3. You may check the application submitted via E-Change in the "Past Records" section.

Previous Step    **Next Step**

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

**Declaration**

Notwithstanding anything contained in this form or any other agreements between us, you agree to provide the Company with such assistance as may be necessary to enable the Company to comply with the Company's obligations under all Applicable Requirements concerning you or your policies with the Company.

You agree to update the Company in a timely manner (within 30 calendar days) of any change of any of the details previously provided to the Company whether at time of application or at any other times. In particular, it is very important that you notify the Company immediately if, where you are an individual, your personal identification numbers, addresses, telephone numbers, nationality, tax status or tax residency changes or if you become tax resident in more than one country, or, where you are a corporation or any other type of entity, your registered address, address of your place of business, substantial shareholders, legal and beneficial owners or controllers (who own or control more than 10% of your shares or ownership interest or control), tax status, tax residency changes or if you become tax resident in more than one country. If any of these changes occurs or if any other information comes to light concerning such changes, the Company may need to request additional documents or information from you. Such information and documents include but are not limited to duly completed and/or executed (and, if necessary, notarized) tax declarations or forms.

If you do not provide the Company with the information or documents requested in a timely manner, or if the information or documents provided are not up-to-date, accurate or complete you agree that the Company may take any relevant action which may be determined by the Company in its sole and absolute discretion to be required to ensure compliance with the applicable Laws and Regulations of the part of Company.

Disagree    **Agree**

**2** Are you sure you want to update the following information

Updated Beneficiary Information

**Beneficiary (Primary)**

**Beneficiary 1**

Relationship to Insured    Charitable Institution(s) - Policy Donation

Full Name of Beneficiary    Caritas Hong Kong

Certificate of Incorporation    SO000060

Share (%)    80

**Beneficiary 2**

Relationship to Insured    Individual (immediate family member) - Son

Full Name of Beneficiary    Chan Tai Ming

Identity Document    Identity Card

Identity No. of Document    Y1234567

Date of Birth (YYYY/MM/DD)    2010/03/28

Share (%)    20

**Information of Trustee**

Relationship with Beneficiary    Relative

Relationship to relative    Aunt

Full Name of Trustee    Chan Lai Ming

Identity Document    Identity Card

Identity No. of Document    Y1234765

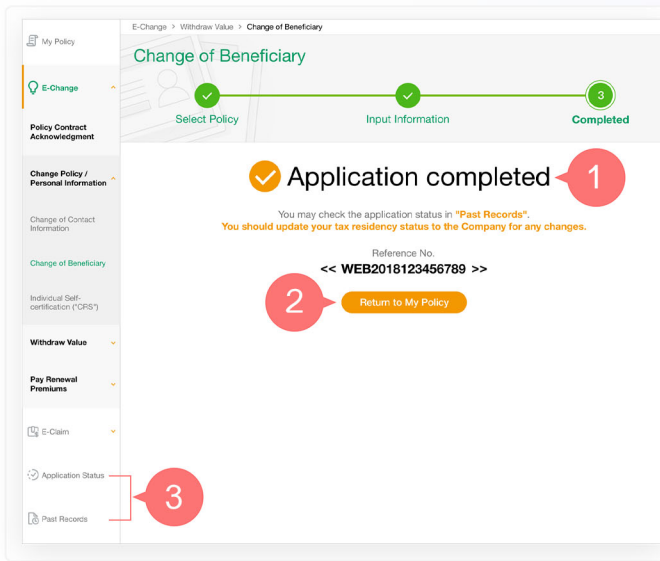
Identity document

TIFF    Identity Card\_1.tiff    JPEG    Identity Card\_2.jpg

**4** Return to Change    **Confirm Submission**    **3**

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.

- Review all policy information at one go
- Check application status anytime
- View various types of E-Notice
- Submit E-Claim instantly
- Change policy information instantly
- Receive instant important messages