

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".

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
1225677

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

Share (%)
100

9 + Add Beneficiary (Primary) 8

✓ Add Beneficiary (Secondary)

Beneficiary (Secondary)

Relationship to Insured
Individual (Inheritance) - Inheritance

Share (%)
100

+ Add Beneficiary (Secondary) 11

Note(s)

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.
3. You may check the application submitted via E-Change in the "Past Records" section.

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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

2. I/We hereby declare and agree that my/our above request shall only take effect provided that all the following conditions are met:
(i) The above request is approved by the Company during the Validity and continued insurability of the Insured of the Policy;
(ii) The Policyholder is legally entitled to the benefits under the Policy which have not been assigned or otherwise transferred to any party other than the Company; and change Beneficiary (if applicable).

3. I/We hereby confirm and undertake that all Beneficiary(ies) previously designated under the Policy is/are fully aware of and if consent is required, has/have consented to the contents of this form.

4. I/We hereby agree and undertake to indemnify the Company in full and hold the Company harmless from any claims, losses, liabilities, damages and all related costs and expenses including legal fees arising from or in connection with my/our above request.

5. I/We understand and agree that all previous designations of Charitable Institution(s) / Charitable Trust(s) / Beneficiary(ies) / Trustee(s) under the Policy shall be revoked once the application under this form is accepted and approved by the Company.

6. I/We understand and agree that if there is any discrepancy or inconsistency between the English version and the Chinese version of this form, the Chinese version shall prevail.

I/We hereby confirm that I/We have read and understood all the terms and conditions, and agree to be bound by those terms and conditions. I/We hereby agree to make the above instructions and declarations.

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Disagree Agree

2 Are you sure you want to update the following information

Updated Beneficiary Information

Beneficiary (Primary)

Beneficiary 1

Relationship to Insured Individual (Inheritance) - Inheritance

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 1225677

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 7233445

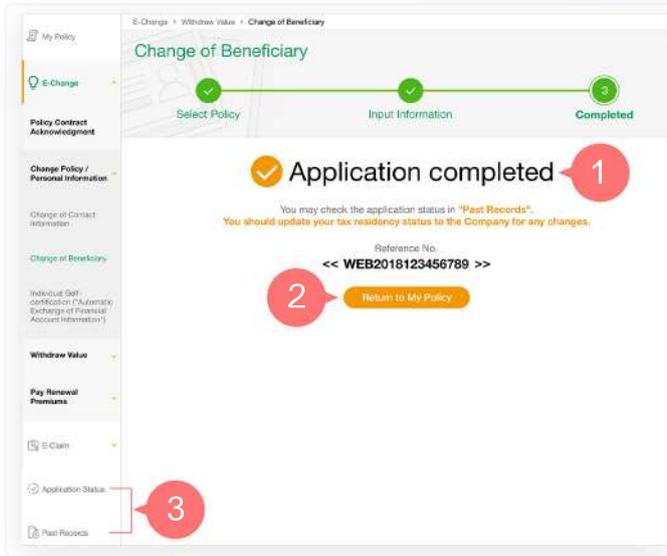
Identity document

Identity Card_1.tiff 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