

## **How to have a video-enabled meeting with us?**

Open the email sent by our insurance specialist, and click “Join Now” in the invitation email

Click “Allow” when the browser asks for permission to open Zoom.

If your device does not have Zoom, you can ignore the “Download” prompt and click “Join from your browser”

After entering the meeting, click “Join with Computer Audio”. This will instantly connect your computer’s speaker or headset to the meeting’s audio.

After joining the meeting, you can adjust the audio settings by clicking the ^ next to the microphone icon in the bottom left corner.

From the menu, you can select your preferred microphone and speaker if your device provides multiple options.

You can also mute/unmute your voice by clicking the microphone icon.

Similarly, you can adjust your video settings by clicking the ^next to the video icon in the bottom left corner.

This allows you to choose your preferred camera when there is more than one option available on your device.

You can also stop/start the video signal by clicking the video icon.

Once you have entered the meeting room, you can start discussing your needs with your relationship manager or insurance specialist.

## **Reviewing and acknowledging the documents**

To follow up on the meeting, we will be sending you digital copies of the documents that require your acknowledgement.

Please note that these documents will expire after 30 calendar days from the documents’ generation date. You will need to log on to HSBC Personal Internet Banking using your Mobile Security Key or Security Device and password before they expire.

Please visit the HSBC homepage at [www.hsbc.com.hk](http://www.hsbc.com.hk) and click the “log on” button at the upper right corner

Once you have log onto Personal Internet Banking, please hover over “My Insurance” in the page header

Select “My sales documents” under the “My Insurance” menu.

You will see a list of documents that have been sent to you. Each line will represent one document and show the document name, the date and time it was sent to you, the document status and any action by you that may be required.

You will also see any other documents that have been sent to you for insurance sales purposes, digital copies of which you have consented to receiving by signing an agreement during previous in-branch face-to-face sales meetings.

These will be shown as "Signed". No further action by you will be required for these.

To acknowledge a document, click the "Read and acknowledge" button against the chosen document.

You can review it in detail to ensure you understand the key information before proceeding with the acknowledgment.

We suggest you read those key sections that normally require your signature as each of these will be listed against a checkbox in the next step.

The "Acknowledge" button located along with the countdown timer and will not be active for 2 minutes after opening.

You can close the document at any time by clicking the "Close" button.

After 2 minutes, the button will become active as shown below, at which point you can click "Acknowledge" to proceed.

Once you have clicked the "Acknowledge" button, you will be presented with a list of the key declarations that would normally require your signature.

Each declaration is accompanied by the checkbox that you are required to check to confirm you have read and understood the declaration.

Once you have checked all the checkboxes, the "Confirm" button will become active. To complete your acknowledgment of the document, just press the "Confirm" button.

To exit without acknowledging, click the "Cancel" button.

Once you have clicked "Confirm", the screen will return to the list of documents. The document's status will now be displayed with the date and time you acknowledged it.

You can now repeat the process for any other documents requiring your acknowledgment.

You can also download a copy of the document by clicking the download icon next to the document name.

Book an appointment now via below link

[www.hsbc.com.hk/bookonline](http://www.hsbc.com.hk/bookonline)

Disclaimer:

When you accept and join the video-enabled meeting, you understand that we will show and discuss your life protection needs using “ZOOM” technology provided by Zoom Video Communications, Inc. (the “Zoom Company”) through the Internet or mobile app. Zoom Company will process your personal data in the manner specified in its Privacy Policy (<https://zoom.us/privacy>). You will also consume your data plan with the transmission of mobile data if you are using your mobile network.

The screenshots above are for reference and illustrative purposes only.

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