

Book an appointment with an insurance specialist online

Step 1 Step 2 Step 3 Step 4 Step 5

Start Select a venue Select date & time Fill in personal details Review & confirm Booking successful

Step 1: Start

On the HSBC homepage, click the "Insurance" tab, and select the insurance product you'd like to learn more about/apply for.

Eg HSBC Wealth Goal Insurance Plan II. On that product's dedicated webpage, click "Book online".

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Step 2: Select a venue

1. Click "By video".
2. Select the branch area. It's recommended that you choose the area where you normally perform your branch banking.
3. Click "Next".

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Step 3: Select date & time

Under "Virtual Insurance Appointment", click "Select"

- Other ways to meet are available for selection

Step 3: Select date & time

1. Choose the "date" you prefer for the virtual meeting.
* Dates marked in grey are not available.
2. Then choose the preferred "time".
3. Click "Next".

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Step 4: Fill in personal details

- First name
- Last name
- Email
- Mobile number
- Identity document number

Step 4: Fill in personal details

To select the insurance needs you'd like to discuss, check the box next to it.

Step 4: Fill in personal details

Check the boxes next to "Virtual sales declarations" and "Terms & Conditions", then click "Next".

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Step 5: Review & confirm

Review your appointment details, then click "Confirm".

Booking successful!

- Please quote the reference number if you need to get in touch with us about the meeting.

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You will receive a confirmation email for the Virtual Insurance Appointment. If you need to change or cancel the appointment, please click the link inside the email.

You will also receive a confirmation SMS for the Virtual Insurance Appointment. If you need to change or cancel the appointment, please call the number provided in the SMS.

How to have a video-enabled meeting with us?

After you have received the confirmation email and SMS, our insurance specialist will follow up by personally sending you another email.

Open the email sent by our insurance specialist, and click the ZOOM link inside.

It's recommended that you use a device with a larger screen, such as a desktop computer or tablet, for a better experience.

Booking an appointment with your insurance specialist online is that simple!

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.

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Should you have any enquiry, please call HSBC Life Service Hotline at (852) 2583 8000.

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