



HEALTHIER, LONGER,
BETTER LIVES

如何使用遙距簽署服務

How to use Remote Signature

財務策劃顧問在電子核保修正中的簽署步驟選擇以「遙距簽署服務」進行認證

Financial Planners choose Remote Signature in step - Signature while filling iAmendment

財務策劃顧問的流程 Financial Planner's Perspective

01



認證及批准

AMENDMENT TO APPLICATION FOR POLICY

注意事項：

1. 營業員/經紀請於指定的簽名範圍內簽署。

本人(YYYY TAN)已閱讀及同意此申請表內之聲明及授權，並同意使用電子簽署提交此用電子方法之申請。

準受保人 / 受保人簽署

清除

*請按以下簽名框簽名。

上一個簽名

下一個簽名



遙距簽名

02

X

確認需要使用遙距簽署服務？一旦按下 " 確認 " ，客戶必須於 4 8 小時內完成遙距簽署過程。

返回

確認

選擇「確認」繼續進行有關申請，系統將自動發送電子郵件給保單持有人以簽署電子核保修正書
Select "Confirm" to proceed following procedure. An email will be sent to policyowner to sign iAmendment Form automatically

選擇「遠程簽名」繼續進行有關申請
Select "Remote Signature" to proceed following procedure

備注:

遙距簽署服務只適用於申請人曾於投保申請中提供流動電話號碼及電郵地址

Remark:

Remote Signature function only applicable for policyowner provided both mobile phone number and email address on application form

遙距簽署服務 - 客戶的流程

Remote Signature – Customer Perspective

發送電子郵件內附網頁超連結及個人資料收集聲明給客戶 An email with hyperlink along with Personal Information Collection Statement sent

客戶的流程 Customer's Perspective

1. OTP

2. 審閱
2. Review

3. 簽署及確認
3. Sign&Confirm

FW: 透過遙距簽署非面談形式簽署投保申請修正書 Sign iAmendment Form through Remote Signature Non Face-2-Face platform...



Reply Reply All Forward ...

Tue 11/02/2021 4:49 PM

Subject: 透過遙距簽署非面談形式簽署投保申請修正書 Sign iAmendment Form through Remote Signature Non Face-2-Face platform.

親愛的客戶

感謝你對友邦保險產品感到興趣。

我們的財務策劃顧問已經為你提交投保申請修正書。

請按 [此處](#) 到達友邦平台，讓您可參閱相關已填寫之文件。如你細閱後同意並確認有關資料內容正確，請於簽名格內簽署確認並提交本公司。

一次性密碼將傳送到您的手機以供閣下登入友邦平台之用。

請注意：當閣下按下超連結，友邦將會檢查你的IP 地址以確定閣下身處香港及將你的IP 地址儲存在友邦的系統內。該資料為必須資料，如沒有該資料，我們則未能為閣下處理申請。有關友邦之個人資料處理，請參閱AIA 個人資料收集聲明 (https://www.aia.com.hk/content/dam/hk/pdf/privacy-statement/AIAHK_PIC_Statement_Ch_v2i_20130501.pdf)

友邦保險 (國際) 有限公司

Dear customer:

Thank you for your interest in our insurance products. Our financial planner has completed the iAmendment form with you. Please click [here](#) to access our platform; this will allow you to review the completed documents and, if you agreed and confirmed the content is accurate, please sign at the designated section as confirmation and submit it back to us. A One-Time-Password will be sent to your mobile for log-in to the platform.

Please note that your IP address of your device used for accessing the hyperlink will be detected and retained by AIA to ensure you are located in Hong Kong while accessing the AIA system via the hyperlink. Please also note that this is a required

客戶按電子郵件內附網頁超連結「[此處](#)」到達友邦平台
Customer click "Here" to access AIA Platform

備注：

- 超連結有效期為48小時。如已逾時，財務策劃顧問需重新提交申請
- 與現行新保單申請做法相同，需通過網際協議(IP)進行位置檢查

Remark:

- The hyperlink is valid for 48 hours and will be expired afterward, agent need to submit the request again
- Location checking by IP is required, same checking as new application handling

友邦平台 — 申請一次性密碼 (OTP) 以進行遙距簽署

AIA Platform (Remote Signature Portal) – request One-Time Password (OTP) via SMS

客戶的流程 Customer's Perspective

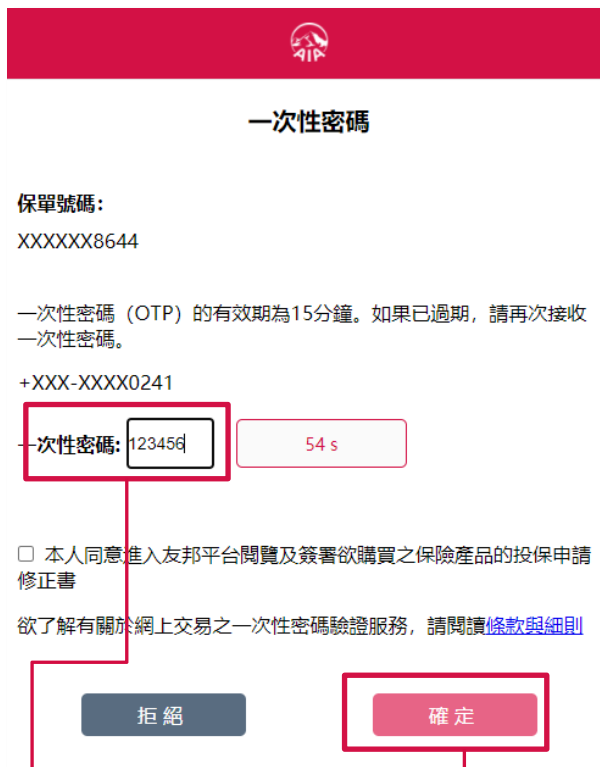
1. OTP

2. 審閱
2. Review

3. 簽署及確認
3. Sign&Confirm

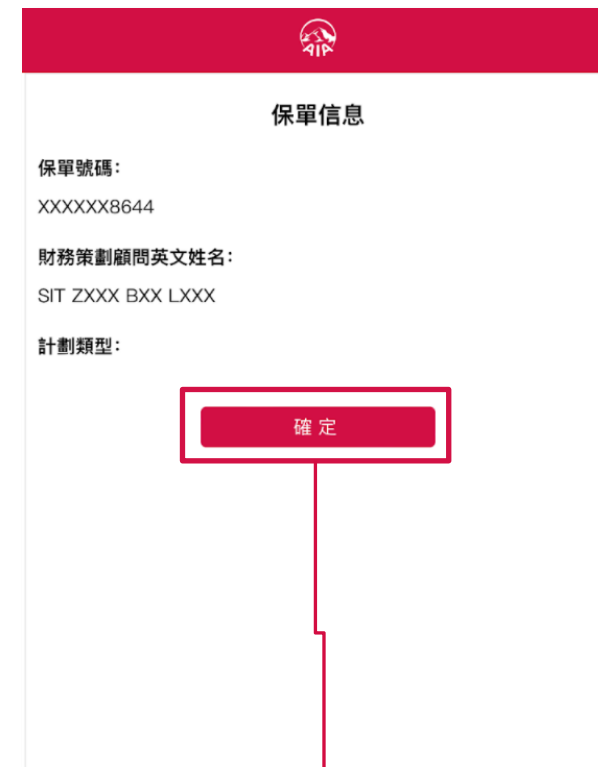


客戶按「接受一次性密碼」
Customer click "Request OTP"



客戶需輸入手機短訊中一次
性密碼
Customer need to input OTP
mentioned in SMS

客戶按「確定」以進行下
一步
Customer click "Confirm" to
proceed next step



客戶核對財務策劃顧問姓名及計劃類型
後，按「確定」以進行下一步
Customer review financial planner
name and plan name, then click
"Confirm" to proceed next step

查看整份電子核保修正書內容 To view whole iAmendment to Application for Policy Form

客戶的流程 Customer's Perspective

1. OTP

2. 審閱
2. Review

3. 簽署及確認
3. Sign&Confirm



投保申請修正書

Amendment to Application for Policy

為了保障您的權益，請在簽名之前詳細查閱以下的投保申請修正書。如有任何疑問，請聯絡您的財務策劃顧問。

- 本人已閱讀及同意此投保申請修正書內之聲明及授權，並同意使用電子簽署提交此用電子方法之申請。

確定

客戶點擊放大鏡圖標以查看整份電子核保修正書內容

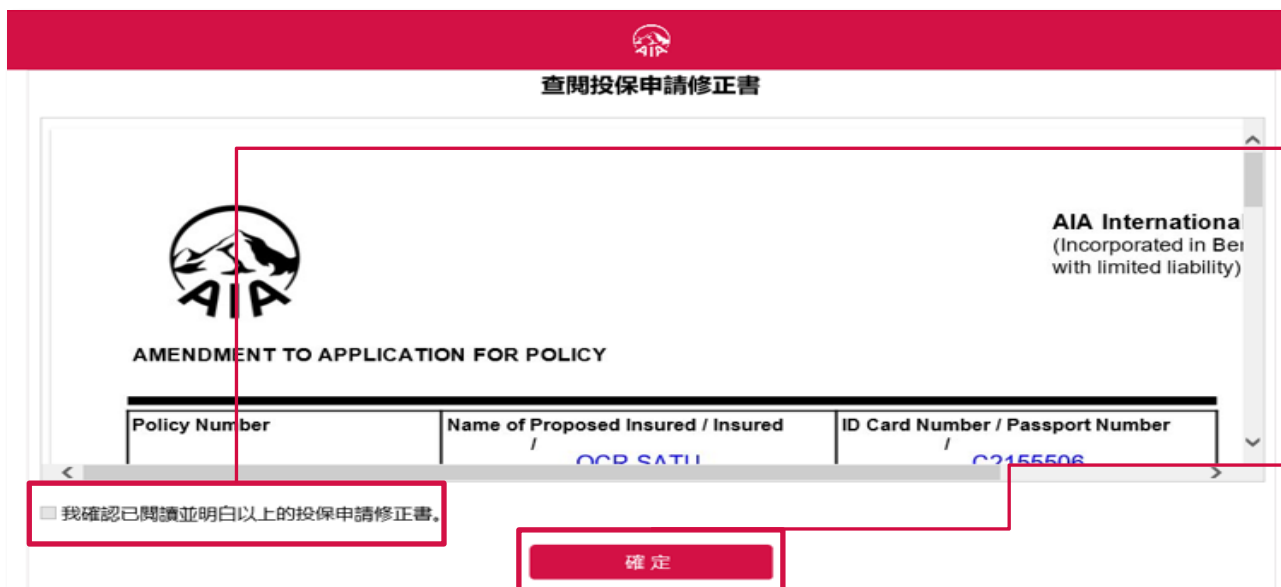
Customer clicking the magnifying glass icon to view whole Form before signing

客戶查閱文件後，剔選方格以確認已閱讀及明白修正書內容

備注：
為確保客戶已完整查閱文件，確認選框僅當客戶查閱至文件底部時才會啓用

To confirm read and understand the Form content by ticking the box

Remarks:
In order to ensure customer has viewed the document fully, the acknowledgement checkbox will only be enabled when customer navigated to the bottom of the Form



查閱投保申請修正書

AIA International
(Incorporated in Bei
with limited liability)

AMENDMENT TO APPLICATION FOR POLICY

Policy Number	Name of Proposed Insured / Insured / OCR SATU	ID Card Number / Passport Number / C2155506
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我確認已閱讀並明白以上的投保申請修正書。

確定

選擇「確定」繼續進行有關申請

Select "Confirm" to proceed following procedure

客戶確定並進行簽署 Customer confirmation and proceed to sign

客戶的流程 Customer's Perspective

1. OTP

2. 審閱
2. Review

3. 簽署及確認
3. Sign&Confirm



投保申請修正書

為了保障您的權益，請在簽名之前詳細查閱以下的投保申請修正書。如有任何疑問，請聯絡您的財務策劃顧問。

Amendment to Application for Policy

• 本人已閱讀及同意此投保申請修正書內之聲明及授權，並同意使用電子簽署提交此用電子方法之申請。

確定

如客戶已完整查閱文件，系統自動於文件旁顯示勾號圖標
If the document completely viewed, tick icon will be displayed besides the document name

選擇「確定」繼續進行有關申請
Select "Confirm" to proceed following procedure



由 OEMNF ISB SOFNE 簽名

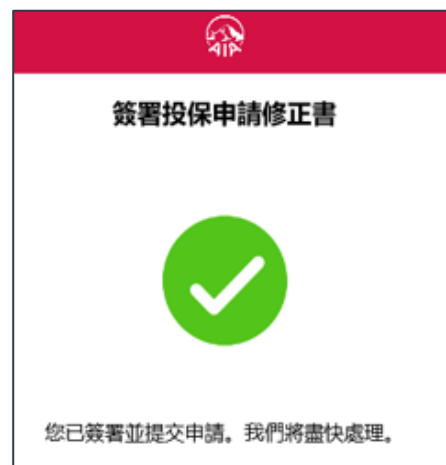
Sample

清空

確定

客戶完成電子簽署，可選擇「確定」提交有關申請
Customer need sign the Form, then select "Confirm" to submit the request

客戶於此方格內簽署
Customer sign in this box



簽署投保申請修正書

您已簽署並提交申請。我們將盡快處理。