

User Guide – Opt-out Physical Copy of Statement, Advice and Receipt

- To be environmentally friendly and avoid mail delay, client can now log into myPrudential to opt out physical copy of statement/advice/receipt/letter and download or view free e-Document online faster and more securely.

Setup Opt-out Physical Copy of Statement/Advice/Receipt

1 Login myPrudential (<http://pruhk.co/login>)

The screenshot shows the 'Customer Login' page. It features two input fields: 'ID / Passport No.' and 'Password'. Below the 'ID / Passport No.' field, there is a note: 'Please enter all characters including symbols e.g. ID number A1234567 is entered as A1234567'. A 'Login' button is located below the password field. To the right, there is a 'Need Assistance?' section with links to 'Online service video demos' and 'More videos'. At the bottom, there is a link for 'New User? Activate Your Account' and a disclaimer: 'Upon logging in, you agree to accept our Disclaimer and Intellectual Property Rights Statements and Privacy Policy.'

2 Select "Policy Services" > "Enquiries" > "eStatement, eAdvice & Letter" on the top menu

The screenshot shows the top navigation menu of the myPrudential website. The menu items are: Home, Policy Services, Investments, Payment, Claims, and General Insurance. Below the menu, there are three columns of links. The 'Enquires' column has a blue box around the link 'eStatement, eAdvice & Letter'. Other links in the 'Enquires' column include 'Policy Details', 'Policy Future Value', and 'Illustration Report'. The 'View Policy Contract' column has links for 'View Policy Contract' and 'Acknowledge eContract'. The 'Maintenance' column has links for 'Beneficiary Appointment', 'Change Dividend Payment Option', 'Change Benefit Protection Option', and 'Change Dividend Allocation'.

3 Select "eStatement, eAdvice & Letter Change my setting" in "Please select function" drop down menu

The screenshot shows the 'View eStatement, eAdvice & Letter' page. At the top, there is a navigation bar with 'Home', 'Policy Services', 'Investments', 'Payment', 'Claims', 'General Insurance', and 'Enterprise Solutions'. Below the navigation bar, there is a 'Welcome' message and 'Last login (HKT) Success'. On the right, there is a 'Logout' button. The main content area has a title 'View eStatement, eAdvice & Letter'. Below the title, there are two dropdown menus: 'Policy no.' with 'View all policies' selected, and 'Period' with 'Latest 1 year' selected. To the right of these dropdowns is a 'Please select function' dropdown menu with a blue box around the option 'eStatement, eAdvice & Letter - Change my setting'. Below the dropdowns, there is a table with three columns: 'Anniversary Statement', 'Premium Notice', and 'Letter'. At the bottom right of the page, there is a pagination control showing '1' and navigation arrows.

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4 Enter email address in Set Up eAlert section and re-enter email address for confirmation.

Note: the email address will be updated into our Company’s record for all electronic communications and will automatically supersede any previous records.

eStatement, eAdvice & Letter - Change My Setting

Please select function

FAQ



Notes:

1. Your myPrudential account will be set to receive eStatement, eAdvice and letter by default. Please complete the "Set up eAlert" section to ensure you can receive eAlert for eStatement. A notification email will be sent to your designated email address provided below when a new eStatement is available for viewing at your "myPrudential - Life Insurance".
2. The email address will be updated into our Company's record for all electronic communications and will automatically supersede any previous records. It will be applied to all life insurance policies in respect of the policyowner and / or life assured.
3. For each applicable document type, please select whether you want to "Receive eStatement" or to "Receive paper-copy through postage".
4. For submission completed after 9:00pm, the instruction will be completed on the next calendar day.

Mobile Phone No.

85291239123

Note: When you submit your instruction, this service will issue "One-Time Passcode" through SMS message to your mobile phone number displayed above. Please make sure the country code, area code, and phone number are all correct.
 For successful delivery of each SMS, registered user of mobile phone number may be subject to applicable SMS service charge imposed by respective mobile phone service providers. For details, please contact the respective mobile phone service providers. Prudential takes no responsibility for such SMS service charge incurred.
 If this is not your current mobile phone number to receive SMS message, before using this service, please contact your financial consultant or call for inquiring the procedure of "Application Form for Change of Contact Details" submission, so that you can receive "One-Time Passcode" through SMS message in the future.

Set Up eAlert

Email address

Notes: This email address will be updated into Prudential's record for all electronic communications (including eAlert for eStatement and eAdvice) and will automatically supersede any previous record.

5 Choose "Receive eStatement" for different types of document.

Note: Policyowner will receive the electronic version of the documents on myPrudential if select "Receive paper-copy through postage". Payment receipt will be issued to client upon our confirmation of payment received (except autopay).

eStatement & eAdvice - Change my setting

| Type of document | Receive eStatement | Receive paper-copy through postage |
|-----------------------|----------------------------------|------------------------------------|
| Anniversary Statement | <input checked="" type="radio"/> | <input type="radio"/> |
| Payment Receipt | <input checked="" type="radio"/> | <input type="radio"/> |
| Premium Notice | <input checked="" type="radio"/> | <input type="radio"/> |
| Fund Trading Advice | <input checked="" type="radio"/> | <input type="radio"/> |

Remarks:

1. Regardless of your selection option, eStatement, eAdvice and letter are available at "myPrudential - Life Insurance" for easy access.

Cancel Reset

Next

6 Please check your mobile and enter the 6-digit One-Time Passcode provided in SMS message in order to verify your identity.

Identity Verification

SMS message has been sent to your mobile phone number:

85291239123

Please check your mobile phone and enter the One-Time Passcode provided in SMS message in order to verify your identity.

Enter 6-digit One-Time Passcode (SMS serial no.: 0028)

[Get new code](#)

Notes:

1. Please click "Submit" when you have entered the One-Time Passcode.
2. If you have problem receiving the SMS message, you may click "Get new code" to retry.
3. If system cannot verify your identity within 3 consecutive One-Time Passcodes, authentication service will be suspended for 30 minutes. You will not be able to continue with your instruction submission during the period.

Cancel
Submit

7 Please read the content of "Personal Information Collection Statement" and check the box to confirm you have read the content of "Personal Information Collection Statement". Click "Confirm" to represent the understanding of and agreement to the contents of Personal Information Collection Statement and the Privacy Policy of Prudential to complete the application.

eStatement, eAdvice & Letter - Change My Setting

Step 1
Input Information
Step 2
Preview details
Step 3
Complete Submission

Personal Information Collection Statement

[Please click here to view the content of "Personal Information Collection Statement".](#)

I confirm I have read the contents of "Personal Information Collection Statement".

Prudential intends to send you marketing communications but can only do so with your consent. If you consent, Prudential may use your contact details and information about the products you have purchased (including the sales channel from which such products were purchased). If agree, please tick the box provided on the left.

By clicking "Confirm", I confirm my understanding of and agreement to (i) the contents of the above Declaration; (ii) the contents of the above "Personal Information Collection Statement" section; (iii) the Disclaimer and Intellectual Property Rights Statement; and (iv) the Privacy Policy.

Set Up eAlert

Prudential@gmail.com

Enter email:

Note: This email address will be updated only if required for all statement communications including alert for statement and eStatement and not eStatement/Receipt/Policy/Receipt.

eStatement & eAdvice - Change my setting

| How to receive statement |
|--------------------------|
| Receive statement |
| Receive statement |
| Receive statement |
| Receive statement |

Cancel Confirm

8 Completed submission.

The screenshot shows the completion page for 'eStatement, eAdvice & Letter - Change My Setting'. It features a progress bar with three steps: Step 1 (Input information), Step 2 (Preview details), and Step 3 (Complete submission), with Step 3 being the active and completed step. Below the progress bar, a message states 'Your instruction(s) has(have) been completed.' and provides a table of submission details.

| | |
|---------------------------------------|--|
| Date of submission (DD/MM/YYYY HH:MM) | 20/07/2021 11:10 (H.K. Time) |
| Type of instruction | eStatement & eAdvice - Change my setting |
| Reference no. | ES2675065255 |

View eStatement Setting

- 1 Select "Policy Services" > "Enquiries" > "eStatement, eAdvice & Letter" on myPrudential menu
- 2 Select "eStatement, eAdvice & Letter - View my setting" in "Please select function"

The screenshot displays the 'View eStatement, eAdvice & Letter' page on the myPrudential website. It shows a navigation menu with 'Policy Services' selected. A dropdown menu is open under 'Please select function', with 'eStatement, eAdvice & Letter - View my setting' highlighted. Below this, the 'View My Setting' page is shown, featuring an 'eAlert Setting' section with an email address and a 'My Setting' table for document preferences.

| Type of document | How to receive statement |
|-----------------------|--------------------------|
| Anniversary Statement | Receive eStatement |
| Premium Notice | Receive eStatement |
| Payment Receipt | Receive eStatement |
| Fund Trading Advice | Receive eStatement |

View Documents on myPrudential

- 1 Select "Policy Services" > "Enquiries" > "eStatement, eAdvice & Letter" on myPrudential menu
- 2 Click the document tab to view the documents for the latest 3 years.

View eStatement, eAdvice & Letter

Policy no. View all policies

Period Latest 1 year Refresh

| Anniversary Statement | | Premium Notice | | Letter | |
|-----------------------|--------------|----------------------|--------------|---------------------------|----------|
| Important | Policy no. | Basic plan | Life assured | Printed date (DD/MM/YYYY) | Doc Name |
| ✉ | 000012345678 | PRULife Protector II | CHAN TAI MAN | 23/03/2023 | Notice |
| ✉ | 000012345679 | PRULife Protector II | CHAN TAI MAN | 31/10/2022 | Notice |

Note :

1. Payment receipt will be issued to client upon our confirmation of payment received.
2. Your eStatement will be retained for up to last 3 years from the printed date. Please save a copy for your future reference.
3. You will need Adobe Acrobat Reader (version 5 or above) installed in your computer to view the PDF (Portable Document File) file of eStatement. You are recommended to upgrade the Adobe Acrobat Reader to the latest version to view your eStatement.
4. If you cannot view Chinese fonts in the PDF file, please download and install the free Chinese Traditional Font Pack files from Adobe website.
5. No payment receipt will be issued for DDA payment. Policy Anniversary date will be updated to next payment date upon successful DDA payment.
6. Letters are available on myPrudential for enquiry. More letters would be available to view on myPrudential later.
7. For letters related to more than one policy, "-" is displayed under Policy no., Basic plan and Life assured columns.

View Receipts on myPrudential

- 1 Select "Payment" > "View Payment Record" on myPrudential menu
- 2 Select related payment record, and click the "Receipt" icon on the right-hand side to easily view and download the payment receipt

View Payment Record

View all policies Latest 7 years

Showing 3 results

| Transaction Date (DD/MM/YYYY) | Policy No. | Payment Type | Payment Method | Payment Amount | Receipt |
|-------------------------------|--|------------------------------|--|----------------|--------------|
| 07/11/2022 | 000012345678 PRULink assurance plus | Premium and Levy | Cheque / Cashier's Order / Bank Draft Reference No.: 233233 | USD 100.00 | Receipt icon |
| 02/02/2021 | 000012345678 PRULink assurance plus | Change / Revival / Admin Fee | Cash | USD 500.00 | Receipt icon |
| 10/07/2019 | 000012345678 PRULink assurance plus | Premium and Levy | Bank Account Autopay | HKD 1,125.46 | Receipt icon |

1-3 of 3 results