

# 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 excluding 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 'Online service video demos' and links to 'More videos'.

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

The screenshot shows the top navigation menu of the myPrudential website. The 'Policy Services' menu is expanded, showing 'Enquires' with a sub-menu. The 'eStatement, eAdvice & Letter' option is highlighted with a blue box. Other menu items include 'Home', 'Investments', 'Payment', 'Claims', and 'General Insurance'. The 'Enquires' sub-menu includes 'Policy Details', 'eStatement, eAdvice & Letter', 'Policy Future Value Illustration Report', and 'Maintenance'.

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

The screenshot shows the 'View eStatement, eAdvice & Letter' page. It features a 'Please select function' dropdown menu with the following options: 'View eStatement, eAdvice & Letter', 'eStatement, eAdvice & Letter - Change my setting' (highlighted with a blue box), and 'eStatement, eAdvice & Letter - View my setting'. Below the dropdown, there are two filter fields: 'Policy no.' with a dropdown set to 'View all policies' and 'Period' with a dropdown set to 'Latest 1 year'. The main content area is divided into three columns: 'Anniversary Statement', 'Premium Notice', and 'Letter'. A pagination bar at the bottom shows '1' in the center, with navigation arrows on either side.

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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

Please select function

Step 1 Input information Step 2 Preview details Step 3 Complete submission

Set Up eAlert

prudential@gmail.com

prudential@gmail.com

Alerts: This email address will be updated with important notices for all investment communications including alert for withdrawal and redemptions and all communication system alerts for your product.

eStatement & eAdvice - Change my setting

How to receive statement

Receive statement

Receive statement

Receive statement

Receive statement

By clicking "Confirm", I confirm my understanding 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.

Cancel Edit 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 marked as completed. 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 myPrudential website interface. The main page is titled 'View eStatement, eAdvice & Letter' and includes a dropdown menu for 'Please select function'. The modal window 'eStatement, eAdvice & Letter - View My Setting' is open, showing settings for 'eAlert Setting' and 'My Setting'.

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.

	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

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