

Make a Policy Value Transfer / Withdrawal request in 4 simple steps



Just log in to your Manulife customer account and make a submission online anytime and anywhere—no more hassles of mailing a physical form.

Scan to login



1 From the menu bar, select Portfolio > Transfer / withdraw policy value

Manulife 宏利

Review

Policy & account

Policy / account activity summary

e-Statement / e-Notice

Manage

Transfer / withdraw policy value

Hi PU QA, here's your portfolio

6 Life / Save 1 Health

Your policy & account

Life

La Vie, Paid Up in 15 Years

Policy no.: PU QA

Life Insured: PU QA

Transfer / withdraw policy value

Select instruction

This function is applicable to traditional policies only. It is not applicable to Investment-linked Assurance Schemes or Universal Life insurance plans.

☐ Transfer

Transfer your policy value to the same / another policy.

☐ Withdraw

Withdraw your policy value by bank transfer / cheque.

Let's start

Note: Not applicable for Investment-linked Assurance Scheme (ILAS) or Universal Life policies.

2 Select a policy

Withdraw policy value

Select policy

La Vie, Paid Up in 15 Years

Policy number Insured name

PU QA

La Vie, Paid Up in 15 Years

Policy number Insured name

PU QA

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La Vie, Paid Up in 15 Years

Policy number Insured name

PU QA

Only eligible policies will be shown.

3 Withdrawal:

Choose the policy value amount to be withdrawn and payment method

Withdraw policy value from
La Vie, Paid Up in 15 Years
Policy number:

1 Policy Value 2 Payment method 3 ID document 4 Review & Submit

Choose the policy value amount to be withdrawn
Enter one or more policy value amounts you wish to withdraw

Policy value	Balance	Withdrawal amount	
Dividend	HKD 2,454.02	HKD 1,230.00	<input type="checkbox"/> Withdraw all
Coupon balance	HKD 22,353.13	HKD 4,560.00	<input type="checkbox"/> Withdraw all
Total withdrawal amount		HKD 5,790.00	

Notes:
1. Bank transfer can only be used for payments not exceeding the daily transaction limit of HKD300,000 (or equivalent) per policy. If a payment exceeds HKD300,000 (or equivalent), it will be settled by cheque.
2. The above policy value(s) are based on the assumption that the Policy is in force and all premium due has been paid.
3. Only policy value(s) available to transfer / withdraw are displayed above.

Choose the policy value amount to be withdrawn.

A by FPS

1 Policy Value 2 Payment method 3 Review & Submit

Choose payment method
Select how you want to receive your policy value. Please make sure all details are correct.

☒ Faster Payment System (FPS) ☐ Bank transfer ☐ Cheque

FPS Information
The withdrawal amount will be deposited in HKD (only applicable to the policyowner's bank account).

Registered FPS mobile phone number

Location	Country / region code	Mobile phone number
Select a location	-	-

Reminder: This mobile phone number is for FPS payment only, and will not be updated to your contact information in our record.

Receiving bank account
Total withdrawal amount will be deposited to your FPS default receiving account.

Notes(s)
1. If the bank instruction cannot be proceeded, the withdrawal amount will be issued by cheque.
2. The above instruction will replace the existing default e-Payout method (if any).

You can receive the policy value by Faster Payment System (FPS) for withdrawal amount up to HK\$1,000,000 per policy to your default receiving account by providing your registered FPS mobile phone number.

B by bank transfer

1 Policy Value 2 Payment method 3 Review & Submit

Choose payment method
Select how you want to receive your policy value. Please make sure all details are correct.

☐ Faster Payment System (FPS) ☒ Bank transfer ☐ Cheque

Bank information
The withdrawal amount will be credited to the following bank account in HKD (only applicable to policyowner's bank account).

AUSTRALIA AND NEW ZEALAND BANKING GROUP LTD (152)

123 12345678

i You can receive policy value via bank transfer for withdrawal amount up to HK\$300,000 per policy.

Bank information
The withdrawal amount will be credited to the following bank account in HKD (only applicable to policyowner's bank account).

Bank account info

Bank name (bank code)	Branch code	Account number
AGRICULTURAL BANK OF C...	123	123123

Upload proof of bank account
1. Please provide a copy of valid bank card / statement / passbook
2. Please upload .jpg or .png files not exceeding 4MB each

ii You can setup a new bank account (only applicable to policyowner's own bank accounts) by submitting the below info:

- Enter bank name, branch code & account number
- Upload bank proof (e.g. bank statement or bank book copy showing the name of account holder and account number)

C by cheque

1 Policy Value 2 Payment method 3 Review & Submit

Choose payment method
Select how you want to receive your policy value. Please make sure all details are correct.

☐ Faster Payment System (FPS) ☐ Bank transfer ☒ Cheque

Select cheque currency

☐ HKD ☐ USD (Drawn in Hong Kong) ☐ USD (Drawn in United States)

Select collection method

☐ By mail to my correspondence address ☐ Through my insurance advisor

You can receive a cheque for the policy value

- by mail to your latest correspondence address as shown; or
- distribute through your advisor

3

Transfer:

Choose the policy value amount to be transferred and the purpose of transfer

Transfer policy value from
La Vie, Paid Up in 15 Years
Policy number:

1 Policy Value 2 Policy to transfer to 3 Review & Submit

Choose the policy value amount to be transferred
Enter one or more policy value amounts you wish to transfer

Policy value	Balance	Transfer amount	
Dividend	HKD 1,837.90	HKD 123.00	<input type="checkbox"/> Transfer all
Coupon balance	HKD 19,065.30	HKD 456.00	<input type="checkbox"/> Transfer all
Total transfer amount		HKD 579.00	

Notes(s):
1. The above policy value(s) are based on the assumption that the Policy is in force and all premium due has been paid.
2. Only policy value(s) available to transfer / withdraw are displayed above.

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- i** Choose the policy value amount to be transferred.

1 Policy Value 2 Policy to transfer to 3 Review & Submit

Select a policy to transfer to
Select the policy to transfer your policy value to and the purpose of the transfer.

Same policy

La Vie, Paid Up in 15 Years
Policy number Insured name
PU QA

Another policy

La Vie, Paid Up in 15 Years
Policy number Insured name
PU QA

☐ Pay premium due and levy ☐ Repay policy loan ☐ Make other payments
Please select a purpose

[Change payment mode](#)
[Add Supplementary Benefit](#)

La Vie, Paid Up in 15 Years
Policy number Insured name

- ii** Select which policy to be transferred (same policy or another policy), and one purpose of transfer which covers “Pay premium & levy”, “Repay policy loan”, “Change payment mode” and “Add Supplementary Benefit”.

If you have no identity document (ID) in our records

Submit a copy of valid ID document

Withdraw policy value from
La Vie, Paid Up in 15 Years
Policy number:

1 Policy Value 2 Payment method 3 ID document 4 Review & Submit

Upload copy of ID document
Please attach a copy of the policyowner's ID card / passport / other identification documents to complete the instruction.

[Choose file](#)

Uploading tips
1. For your ID card, please provide a copy of both sides
2. Please upload .jpg or .png files not exceeding 4MB each

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You can submit a copy of your ID here.

4 Review details, confirm declaration & authorization, and submit instructions

Withdraw policy value from
La Vie, Paid Up in 15 Years
Policy number:

1 Policy Value

2 Payment method

3 ID document

4 Review & Submit

Review & Submit
Please review the following details before submitting your instruction.

Instruction details

Withdrawal amount	Dividend	HKD 1,230.00
	Coupon balance	HKD 4,560.00
	Total amount	HKD 5,790.00

Payment method	Bank
Bank name (bank code)	AGRICULTURAL BANK OF CHINA LIMITED (222)
Branch code / account number	123 123123

Supporting documents

Bank document	bank_proof.png
Uploaded document(s)	ID.png

Notes:
1. Manulife reserves the right to accept or reject the instruction if it fails to meet the Company's requirements.
2. In general, Manulife will start to process instructions received at or before 9:00 a.m. Hong Kong time on the same business day. If it is received after 9:00 a.m. Hong Kong time on a business day or on a non-business day, Manulife will start to process it on the next business day. Manulife reserves the right to process any instructions over a longer time period.

Declaration and Authorization:
- I, the policyowner, declare that I have read and understood the **Notice to Customers relating to the Personal Data (Privacy) Ordinance** ("Notice") and agree to the Notice.
- I, the policyowner, hereby acknowledge, agree and confirm that any contributions (i.e., "Loan") payable to the policyowner under the policy pursuant to section 134 of the Insurance Ordinance (Cap. 41), the Insurance (Long Insurance) (Cap. 41) and the Insurance (Long Order) (Cap. 41) shall be treated as an indebtedness to Manulife, and Manulife may first deduct the amount of the outstanding Loan as indebtedness from the benefits and / or entitlements (including, without limitation, the cash value, dividend and / or death proceeds) of the policy which are otherwise available to the policyowner, assignee or beneficiary, if any, pursuant to the policy, in the case may be.
- I, the policyowner, hereby agree to the entire transfer / withdrawal of policy value application with all the notes stated above and understand that the above application is bound by the provisions stated in the Contract. I declare that there is no present or anticipated person made against me. I understand that all payments and benefits from the policy will not be payable by Manulife if the identification of the relevant parties does not completely follow the Company's guidelines and instructions provided in the application.
☐ I hereby acknowledge that I have read, understood and agree to the Declaration and Authorization.

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Submit

Your instruction has been *successfully submitted*.
Reference number: 100883

Save pagePrint

Instruction details

Date / time of submission	22 Dec, 2021 09:26:28
Plan name	La Vie, Paid Up in 15 Years
Policy number	

Withdrawal details

Withdrawal amount	Dividend	HKD 1,230.00
	Coupon balance	HKD 4,560.00
	Total amount	HKD 5,790.00

Payment method	Bank
Bank name (bank code)	AGRICULTURAL BANK OF CHINA LIMITED (222)
Branch code / account number	123 123123

Supporting documents

Bank document	bank_proof.png
Uploaded document(s)	ID.png

Notification message
We will send a notification to you using the contact information below to confirm your instruction.

Mobile	Email
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To view your instruction record, please go to **Portfolio > Policy / account activity summary**.
To submit another instruction, please click **Transfer / withdraw again**.

Transfer / withdraw again

You will receive SMS and email acknowledgment upon online submission. You can also go to Portfolio > Policy / account activity summary on customer website to view your instruction record.

Remarks:

- This function is not applicable to joint-owners / company-owned policies and individual-owned Investment-linked Assurance Schemes (ILAS) or Universal Life policies issued in Hong Kong or Macau.
- Transfer / Withdraw Policy Value covers Dividend, Coupon, Paid-up Additions Cash Value, Premium Refund Benefit, etc. under eligible policies.
- SMS only covers customers with mobile number in Hong Kong, Macau and China.