

OCBC Bank (HK) Personal Mobile Banking

New Features:*

- ➊ Transfer & Pay
- ➋ eIPO and Financing
- ➌ Biometric Logon
- ➍ My portfolio
- ➎ e-Banking Registration
- ➏ View e-Statement & e-Advice
- ➐ Remittance Services
- ➑ All-in-one Investment Account Opening
- ➒ ePIN Reset
- ➓ Push Notification
- ➔ Dormant Account Activation
- ➕ ATM Card Activation
- ➖ Discontinue Paper Statement & Advice
- ➗ Brand New Pre-login Page Design
- ➘ Soft Token
- ➙ Email Address Update
- ➚ Address Update

* Each of the features listed herein is provided for illustration purpose only and is subject to the relevant terms and conditions. For details, please contact the staff of our bank.

OCBC Bank (HK) Personal Mobile Banking

New Features:*

- ⑮ Contact Number Update
- ⑯ Employment Information Update
- ⑰ Daily Limit Maintenance
- ⑱ “More” function menu

1 Transfer & Pay

New user interface for better transfer & payment experience

- Access fund transfer & bill payment in one single screen

New services	Existing mobile banking services
Transfer & Pay	Self / Registered or Non-registered Account Transfer / Nominated Account Transfer
	FPS Small Value Transfer / Scan & Pay
	Card Payment
	Bill Payment
FPS Registration	FPS Account binding
Fund In	NACT in / QR Code Collect

Fund transfer & Bill payment

The 'Select Payee' screen has two tabs: 'My Account' and 'Other Payee'. Under 'My Account', it shows 'OUG Passbook' (OUG 035-802-090585160) and 'HKD SMART Current' (HKD 035-802-372004001). Under 'Other Payee', it shows 'My Bill List' with entries for 'Hongkong Electric' and 'FDBWA Chow Chin Yau School'.

The 'Transfer & Pay' screen is divided into two main sections. The top section, 'From Account', has a 'Select Account' button. The bottom section, 'To Account', has a 'Select Payee' button. Below these are two lists: 'My Payees' (with entries like AC 88, TESTI, TEST, MR RA, CHAN, HAHAL) and 'My Bill List' (with entries like Hong Kong & China Gas, SmarTone, Citibank Credit Cards, etc.). A red dashed box highlights the 'My Payees' and 'My Bill List' sections.

Registered accounts & Nominated accounts

The 'Please enter instruction details' screen shows 'From Account' with a 'Select Account' button and 'To Account' with a 'Select Account' button. The 'To Account' section shows 'TEST USER' (The Bank of East Asia, Limited) with account number HKD 015-101-234567888.

Registered bill template

The 'Please enter instruction details' screen shows 'From Account' with a 'Select Account' button and 'To Merchant' with 'Hongkong Electric'. Below, it shows 'Bill Type' (11) and 'Bill Number' (3320150002).

Remarks:

- ★ icon represents the payee or bill template has registered by two-factor authentication ("2FA")

1 Transfer & Pay



Clear and easy selected payee list

Self-account transfer

Select Payee

My Account Other Payee Merchant X

OUG Passbook OUG 1.9
OUG 035-802-090585160

HKD SMART Current HKD 3,815,885.14
HKD 035-802-372004001

FPS small value transfer

Select Payee

My Account Other Payee Merchant X

To New Payee

FPS Payee's Information

+852 91234567

Please enter a plus sign (+) in front of the country/region code for overseas phone numbers, for example: +44 9991234567

Non-registered account transfer

My Account Other Payee Merchant X

To New Payee

FPS Payee's Information

Mobile Number, Email Address or FPS Identifier

Please enter a plus sign (+) in front of the country/region code for overseas phone numbers, for example: +44 9991234567

Bank Account Number

Registered account transfer & Nominated account transfer

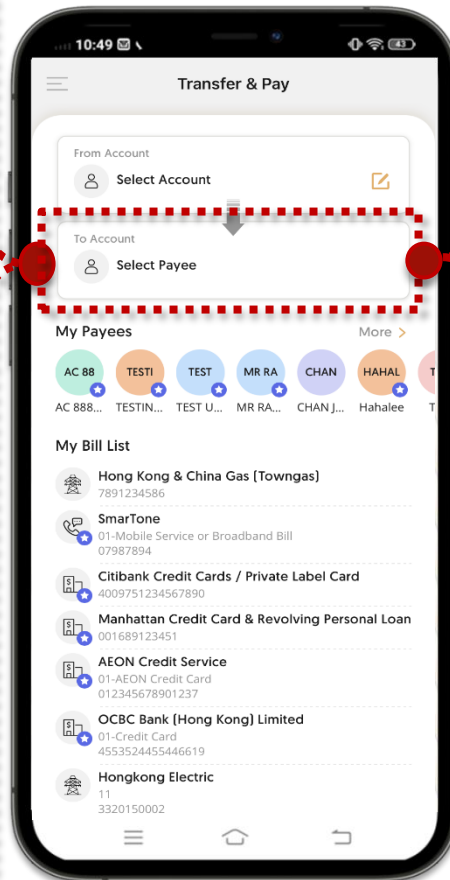
My Payees More >

NICE OCBC Wing Hang Bank Limited
HKD 035-802-405982001

TEST The Bank of East Asia, Limited
HKD 015-101-234567888

LARGE Bank of China (Hong Kong) Limited
HKD 012-987-654321123

ECG UAT CHINA CITIC BANK INTERNATIONAL



Credit card payment

Select Payee

My Account Other Payee Merchant X

Mastercard World HKD 1.00 DR
HKD 3562-2204-0000-0202
Payment due date is around

Mastercard World HKD 0.35 DR
HKD 3562-2104-0000-0203
Payment due date is around

HKD PG myWallet Account HKD 324,257.17
HKD 035-804-000099201

HKD Current HKD 199,985,067.75
HKD 035-802-784352001

HKD Current - HKD 20,200,805,473.88
HKD 035-802-531215001

Bill payment (Registered bills & non-registered bills)

My Account Other Payee Merchant X

Merchant Name

AEON Credit Service

Bill Type

01-AEON Credit Card

Bill Number

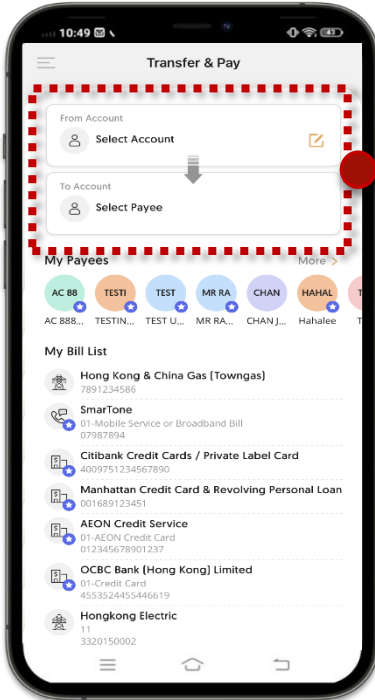
012345678901237

1 Transfer & Pay

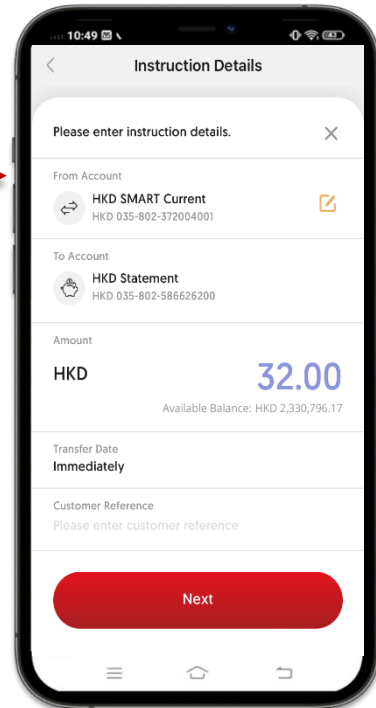


1) Fund Transfer to Self-Account (includes currency exchange)

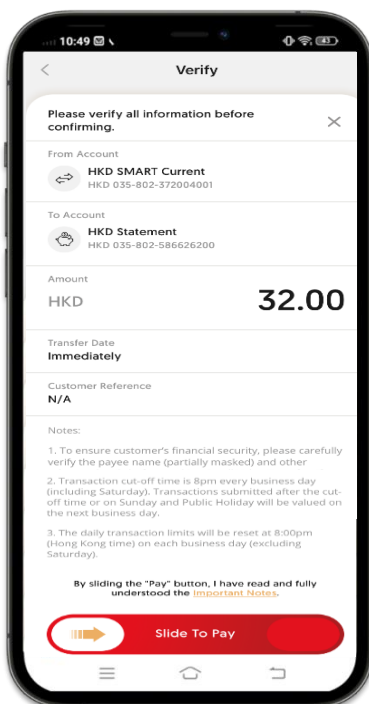
1 Select "from account" or "to account"



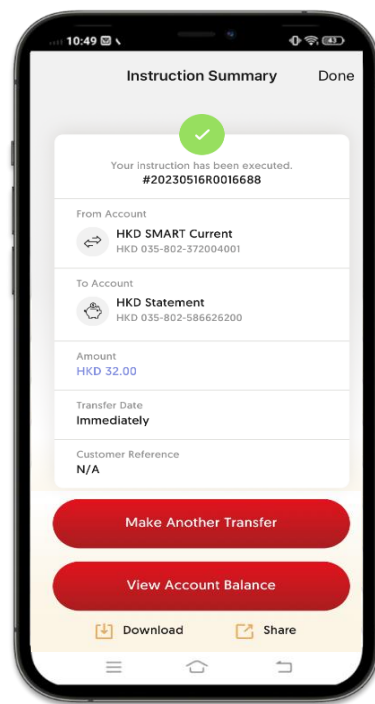
2 Enter transaction details



3 Review the details and submit the instruction



4 Your instruction is submitted

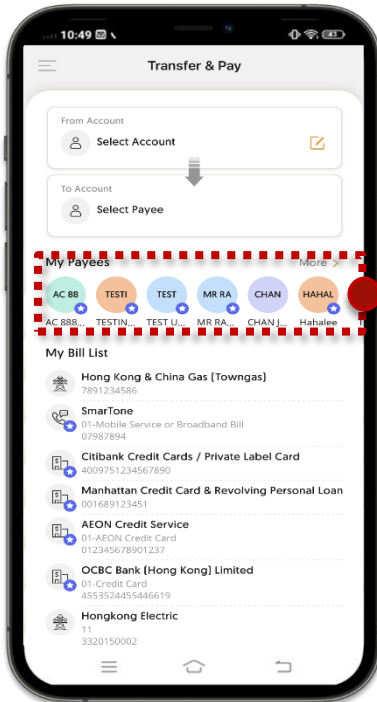


1 Transfer & Pay

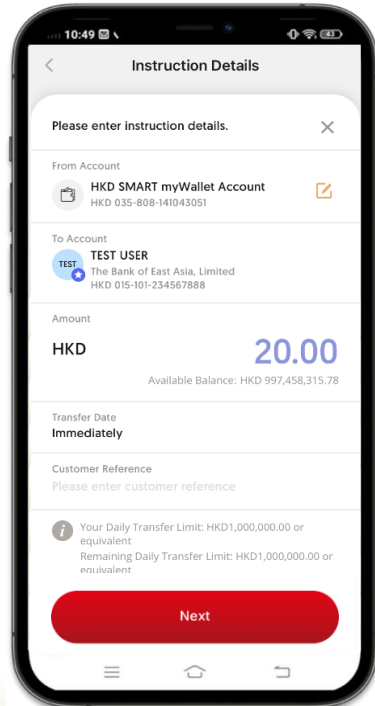


2) Fund Transfer to Registered Account (OCBC Bank / Other Local Banks)

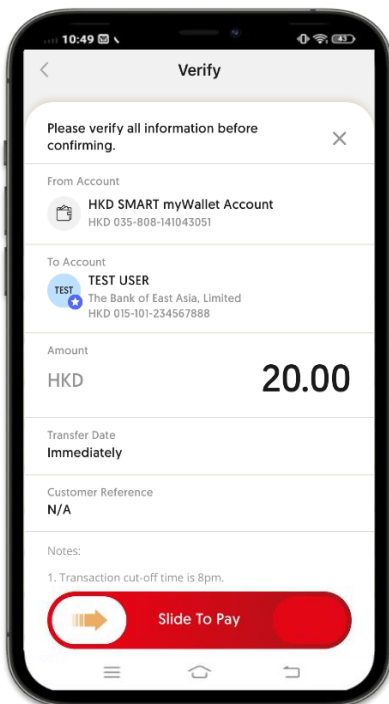
1 Select "from account" or "to account"



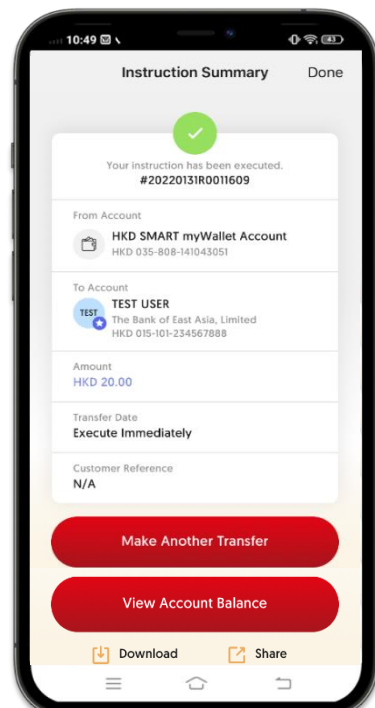
2 Enter transaction details



3 Review the details and submit the instruction



4 Your instruction is submitted



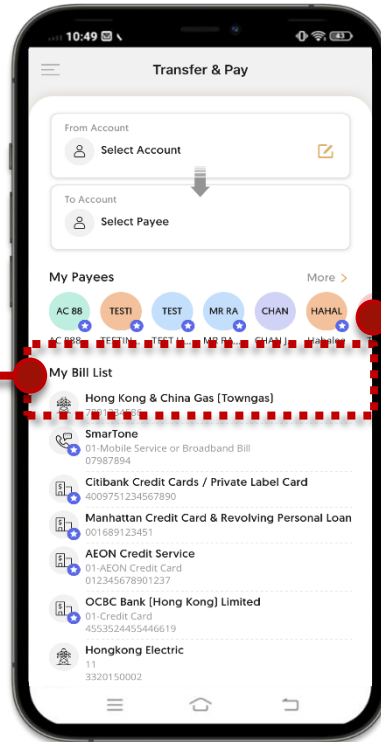
1 Transfer & Pay



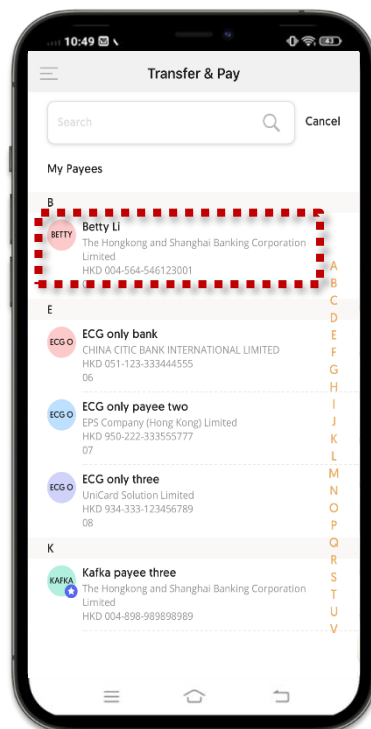
3) Fund Transfer to Registered Account (Nominated Account Transfer – Outward)

1 Select a NACT account in “My Payee” section

Nominated account
transfer payee:
Without  icon



Enquire account number &
transfer code



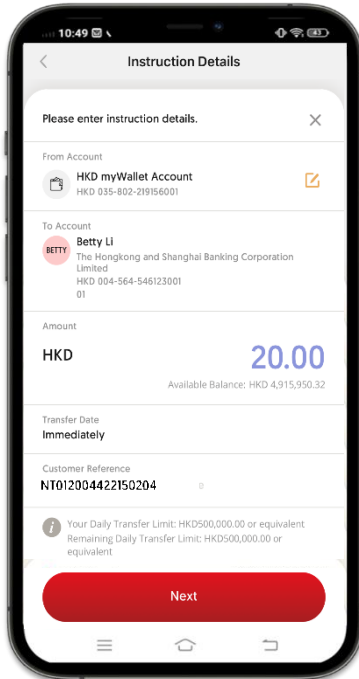
 **Betty Li**
The Hongkong and Shanghai Banking Corporation
Limited
HKD 004-564-546123001
01

1 Transfer & Pay



3) Fund Transfer to Registered Account (Nominated Account Transfer – Outward) (CONT'D)

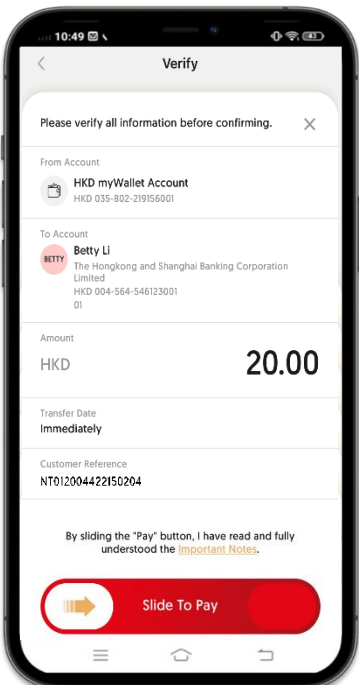
2 Enter transaction details



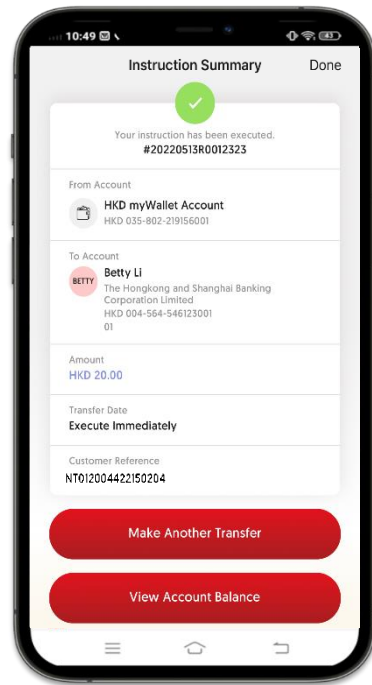
Once selected the Nominated Account, the below information will be filled automatically and not editable:

- From Account
- To Account
- Currency
- Customer Reference

3 Review the details and submit the instruction



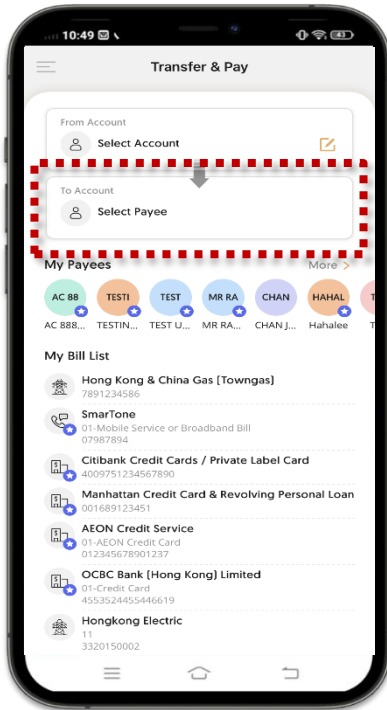
4 Your instruction is submitted



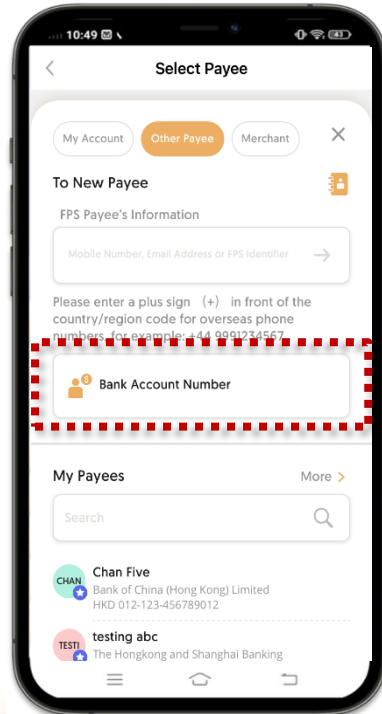
1 Transfer & Pay

4) Fund Transfer to non-registered Account (OCBC Bank / Other Local Banks)

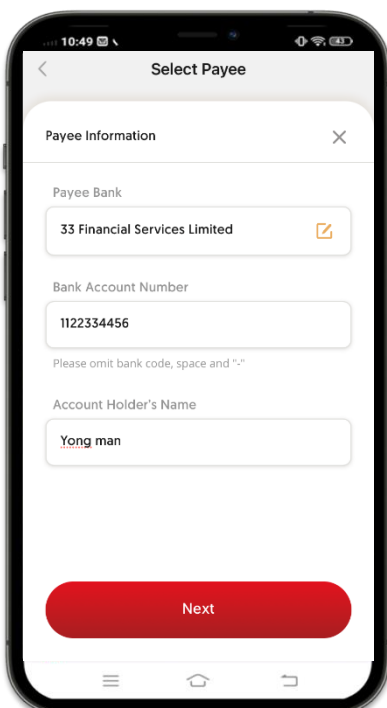
1 Select "from account" or "to account"



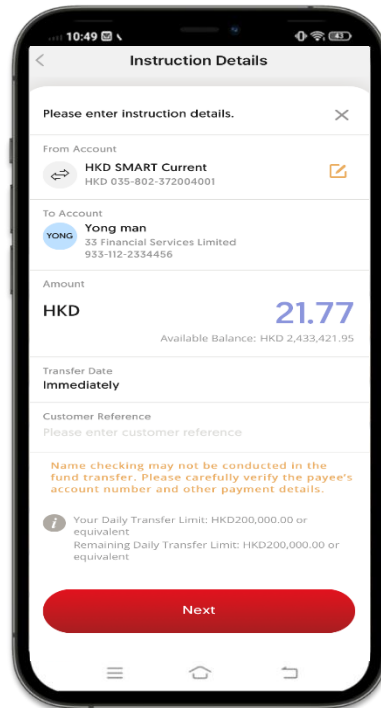
2 Select "Bank Account Number" button



3 Enter payee details



4 Enter transaction details

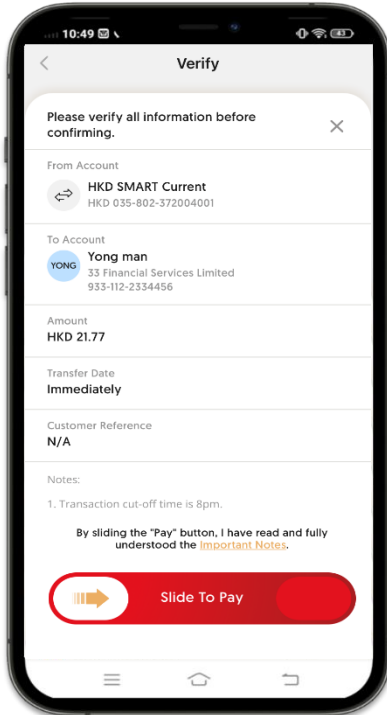


1 Transfer & Pay

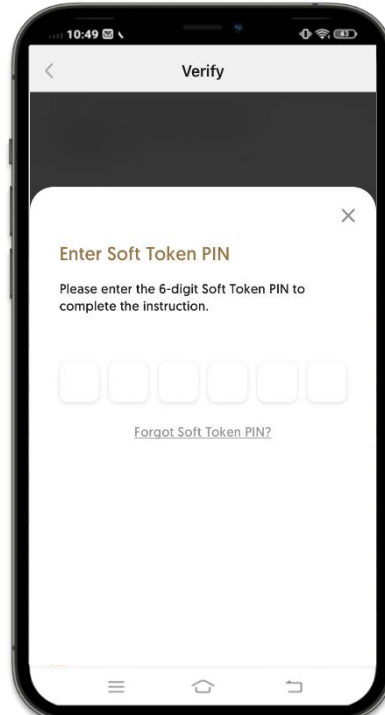


4) Fund Transfer to non-registered Account (OCBC Bank / Other Local Banks) (CONT'D)

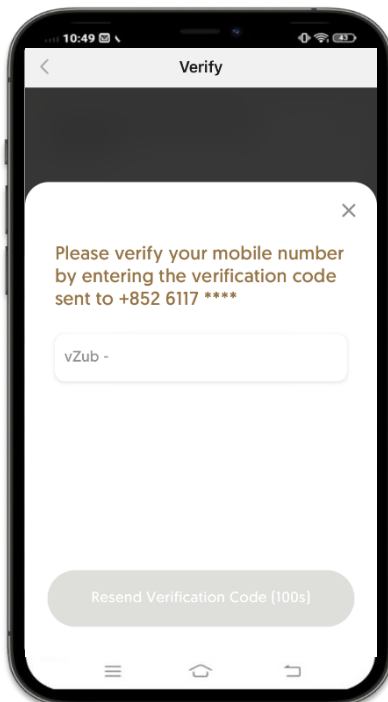
5 Review the details and submit the instruction



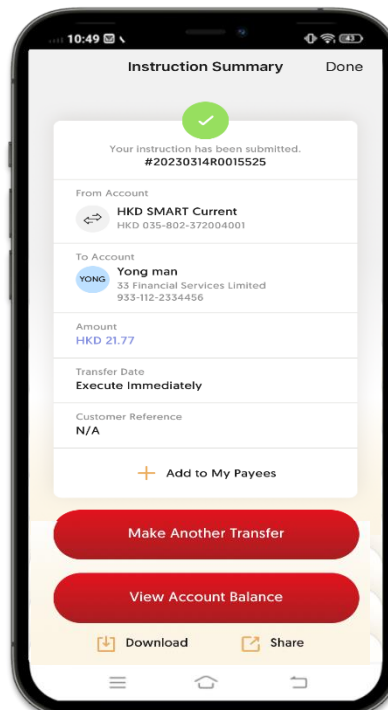
6 Enter Soft token PIN for authentication



7 Enter SMS OTP (1st time high-risk transaction after soft token effective)



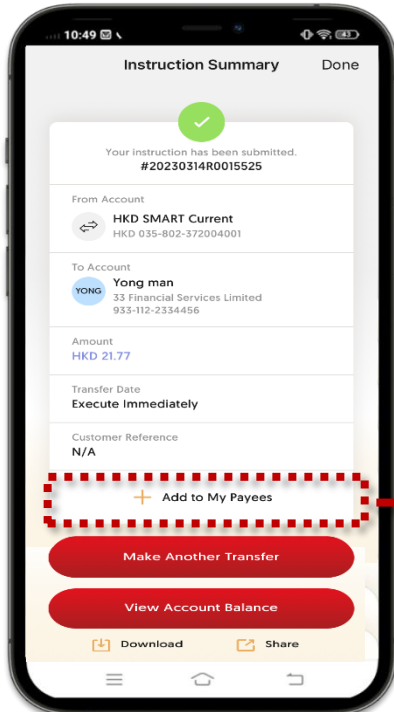
8 Your instruction is submitted



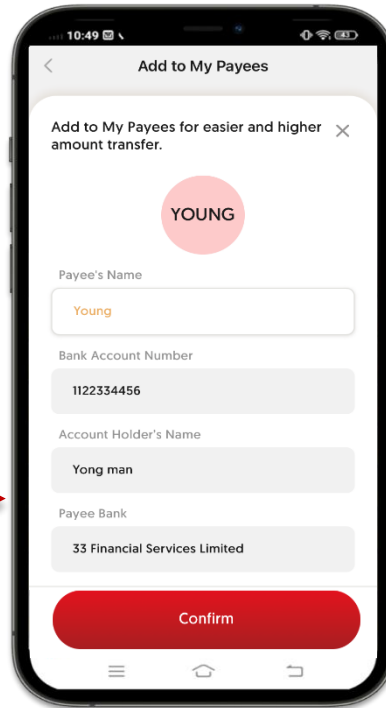
1 Transfer & Pay

5) Register payee after fund Transfer to non-registered Account

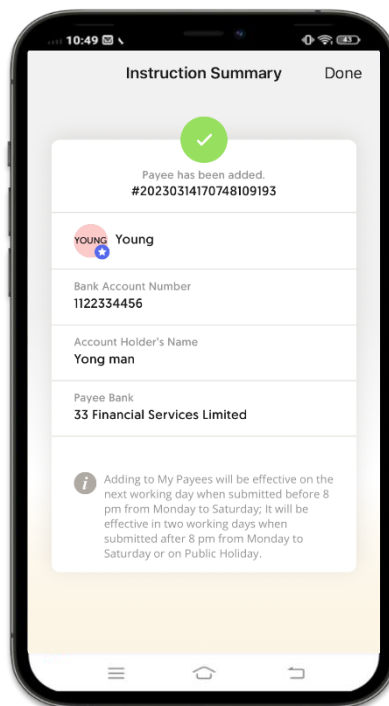
1 Your instruction is submitted



2 Enter "Payee's Name"



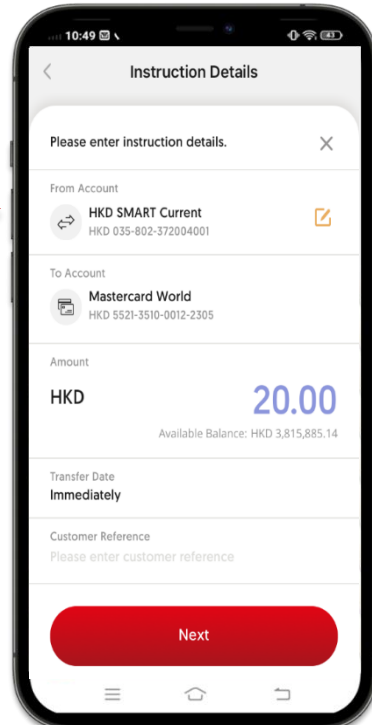
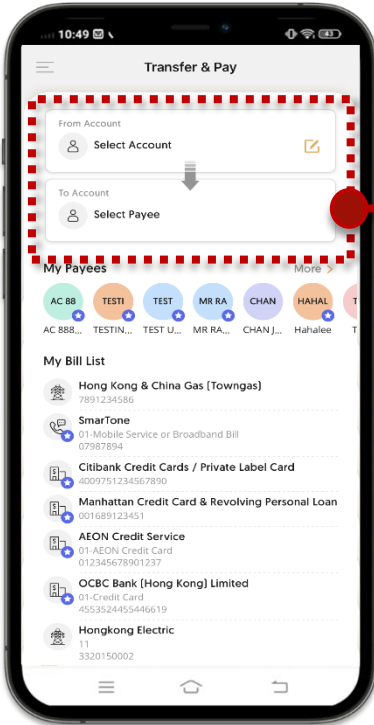
3 Your instruction is submitted (Payee will be effective one working day after registration)



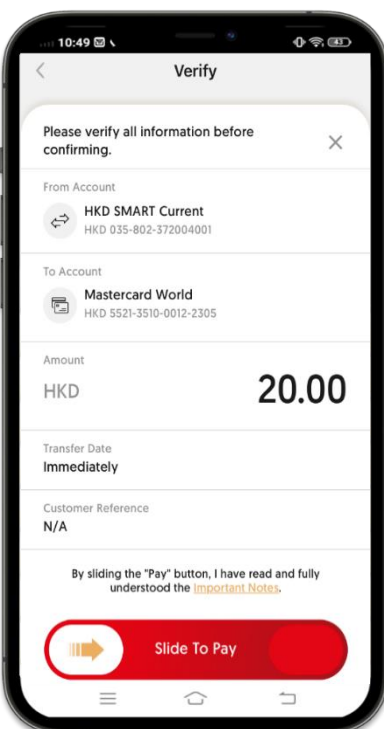
1 Transfer & Pay

6) Credit Card Payment

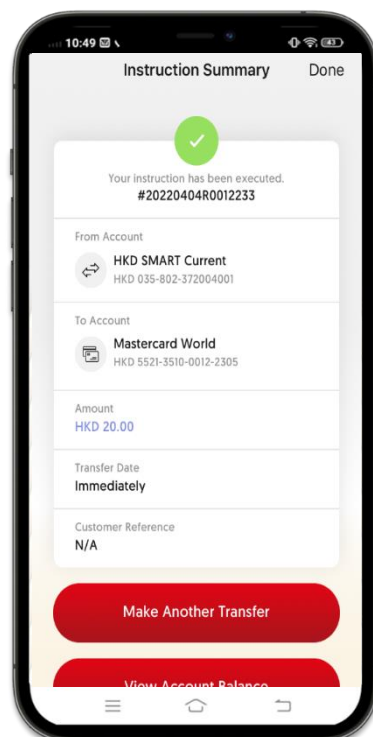
- 1 Select "from account" or "to account"



- 3 Review the details and submit the instruction



- 4 Your instruction is submitted

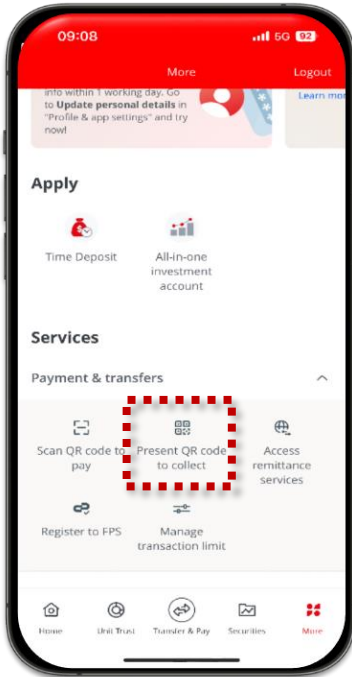


1 Transfer & Pay

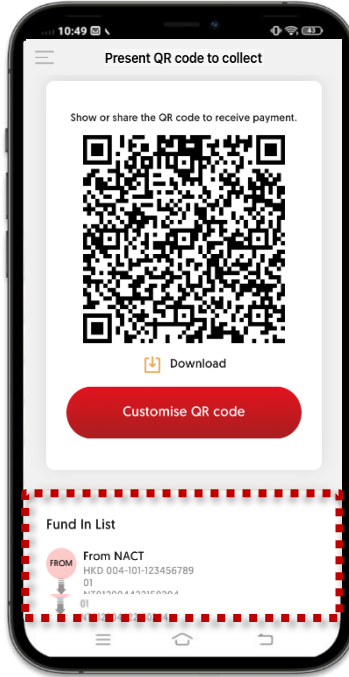


7) Present QR Code Collect (Nominated Account Transfer – Inward)

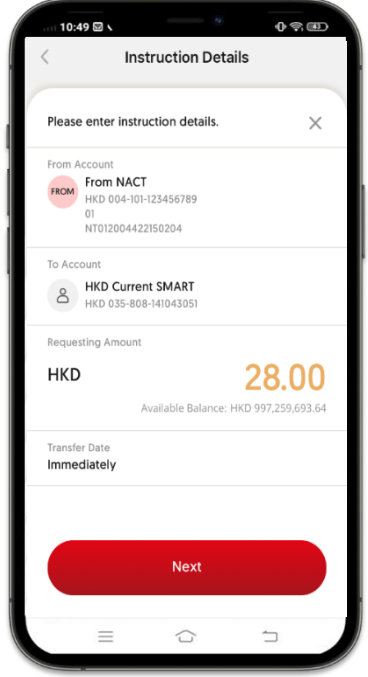
1 Select “Present QR Code Collect” from More menu



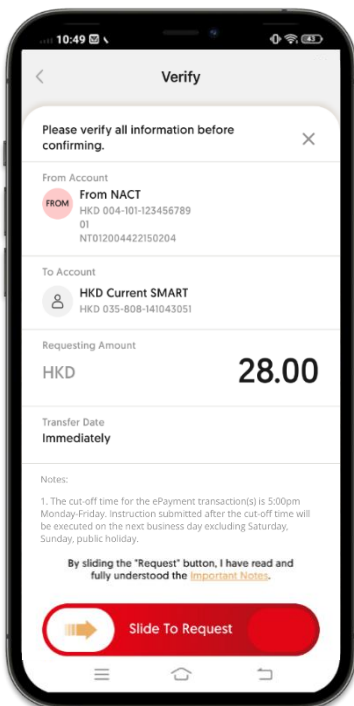
2 Select fund in instruction



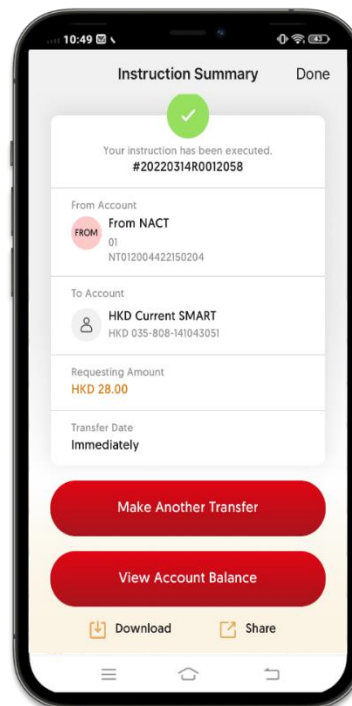
3 Enter transaction details



4 Review the details and submit the instruction



5 Your instruction is submitted

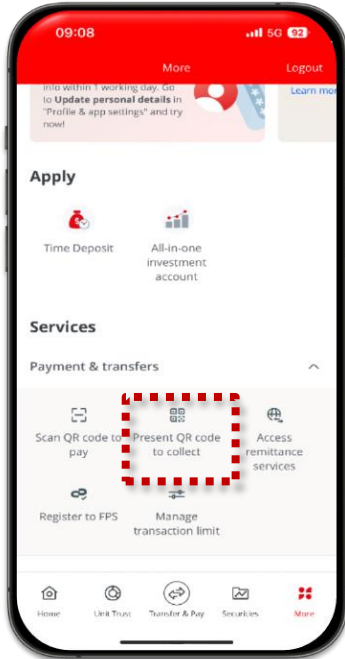


1 Transfer & Pay

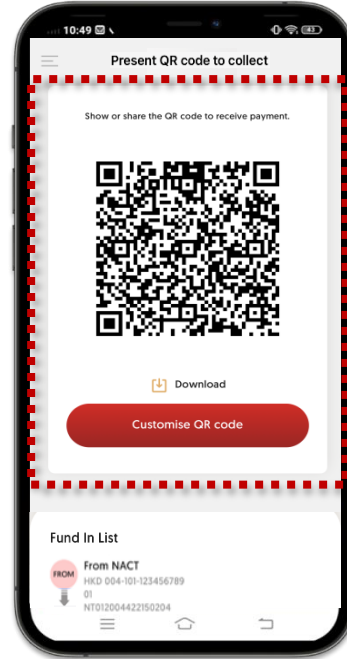


8) QR Code Collect

1 Select "Present QR Code Collect" from More menu



2 Static QR Code will show

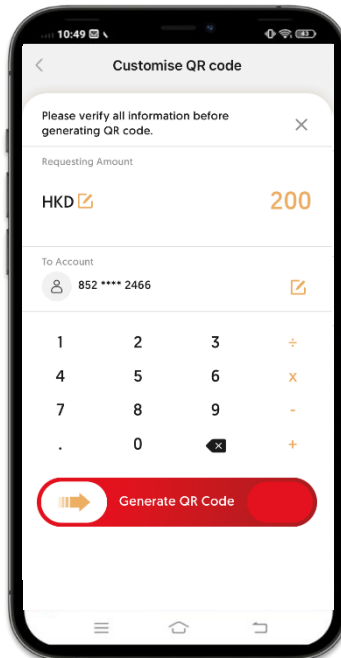


If customer want to customize the QR Code

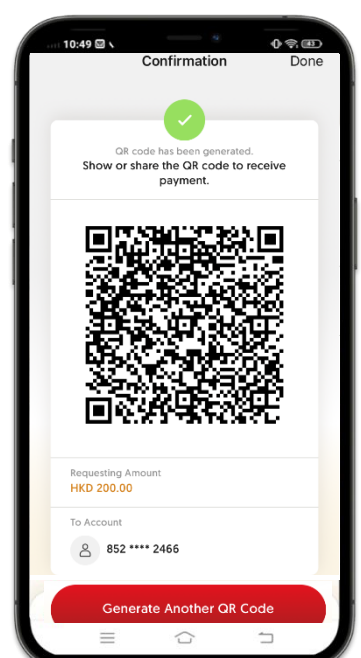
3 Select "Customise QR Code" button



4 Enter QR Code details



5 Your instruction is submitted

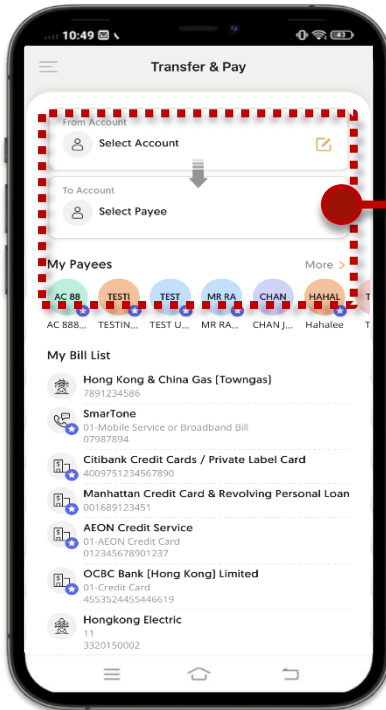


1 Transfer & Pay

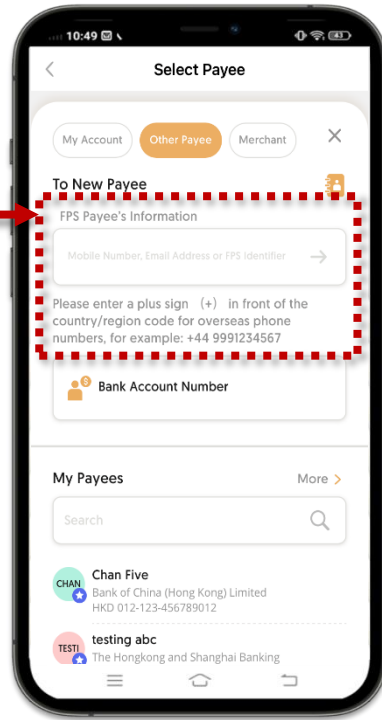


9) FPS Small Value Transfer

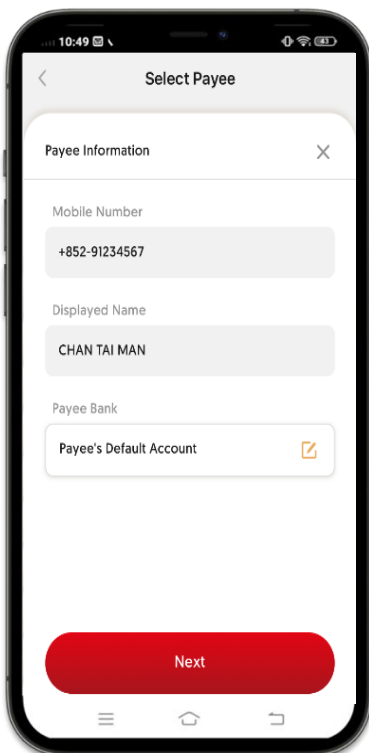
1 Select "from account" or "to account"



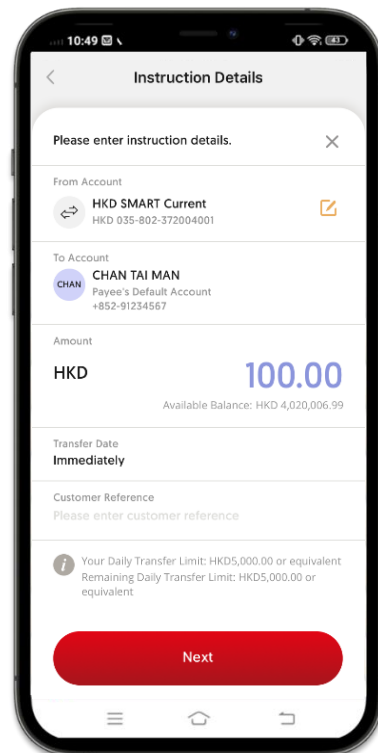
2 Enter FPS payee details



3 Confirm FPS payee details



4 Enter transaction details

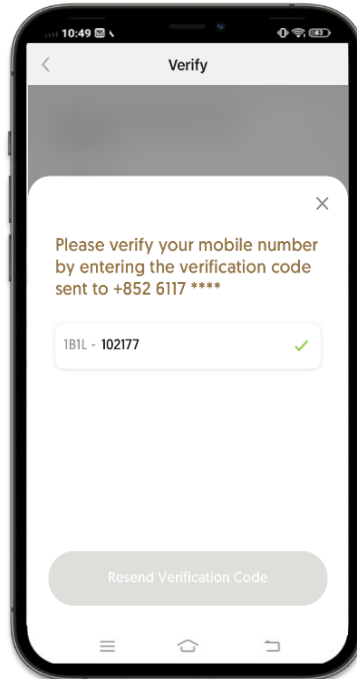
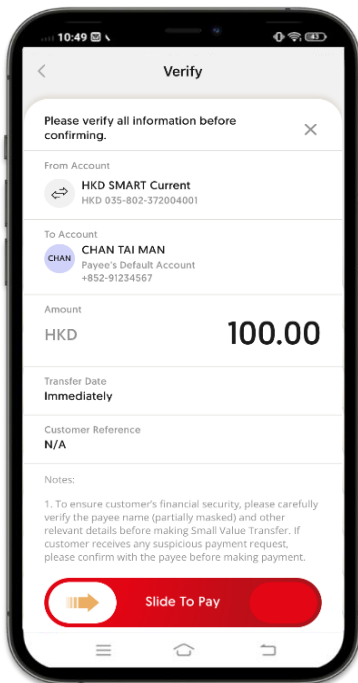


1 Transfer & Pay

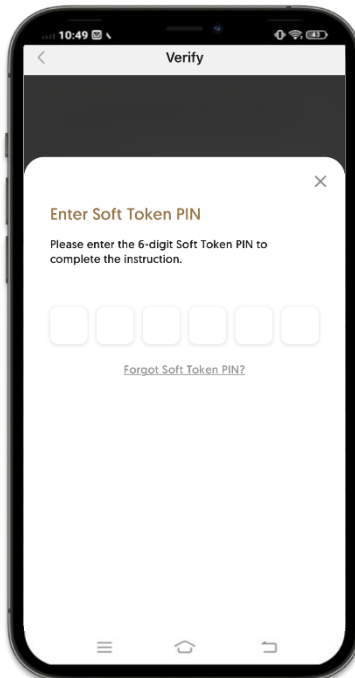
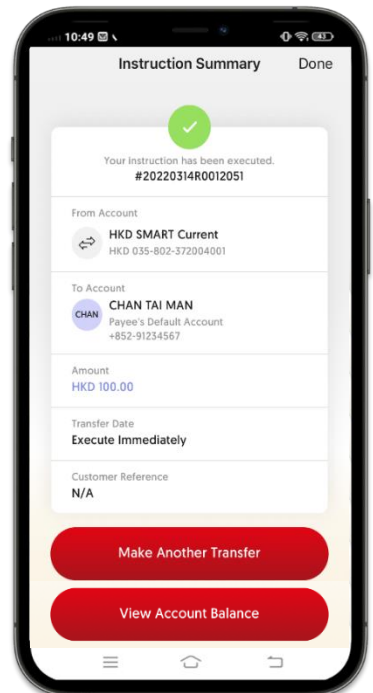
9) FPS Small Value Transfer (CONT'D)

6 Input SMS OTP or Soft token PIN

5 Review the details and submit the instruction



7 Your instruction is submitted

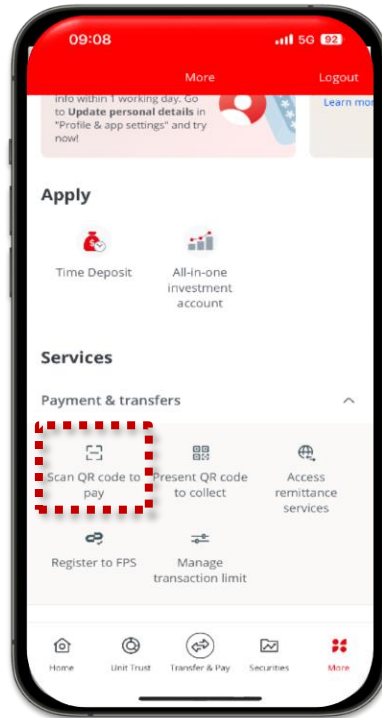


* If user registered soft token before, user must use the soft token PIN as authentication.

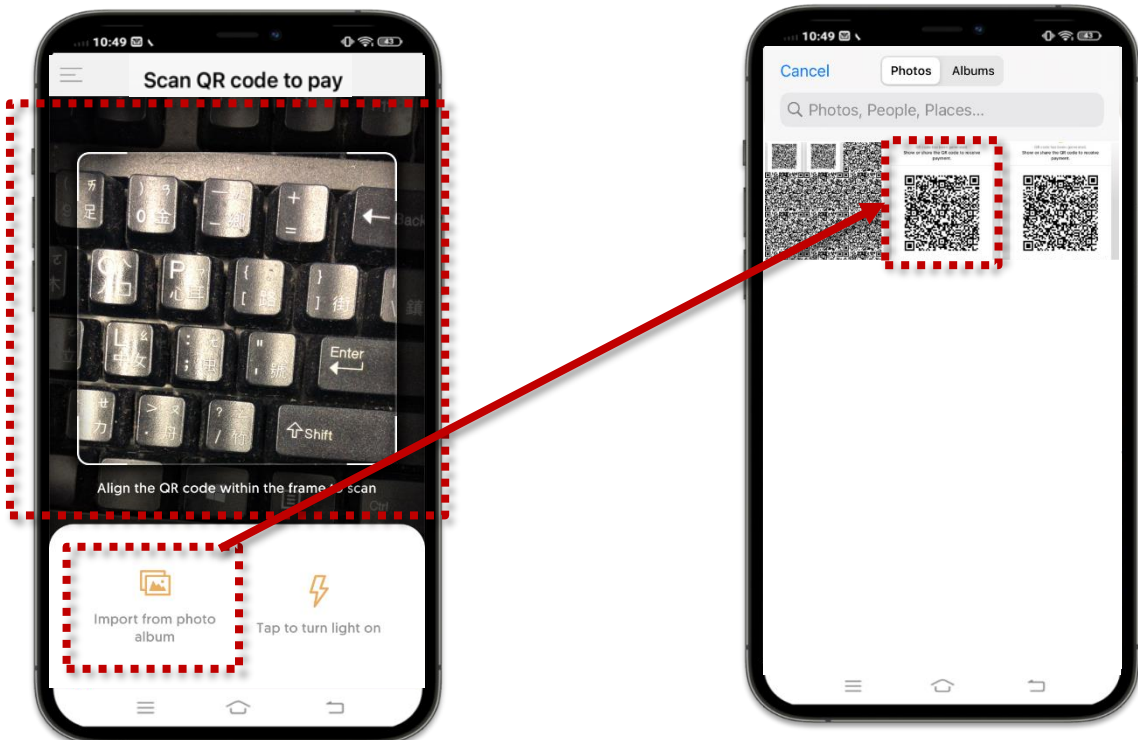
1 Transfer & Pay

10) Scan QR code to pay

- 1 Select "Scan QR code to pay" from more menu



- 2 Scan the QR code or import from photo album

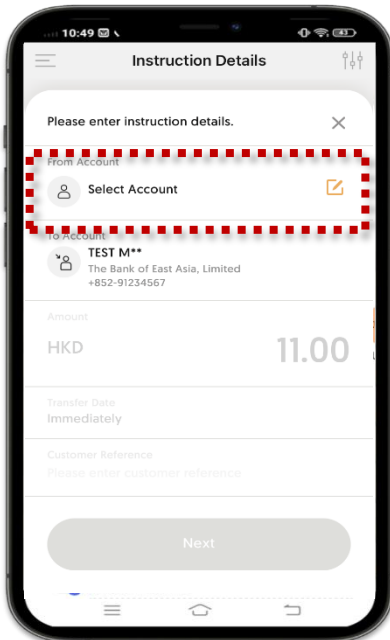


1 Transfer & Pay

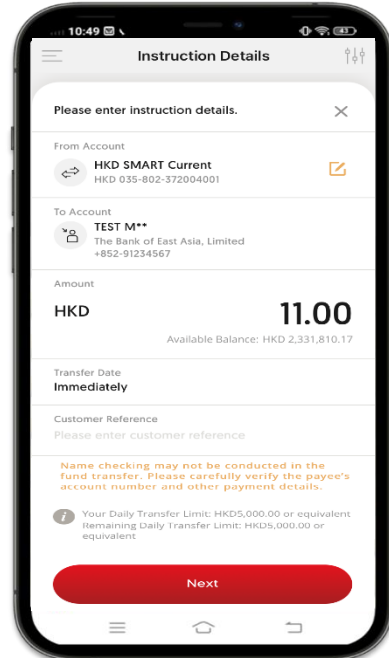


10) Scan QR code to pay (CONT'D)

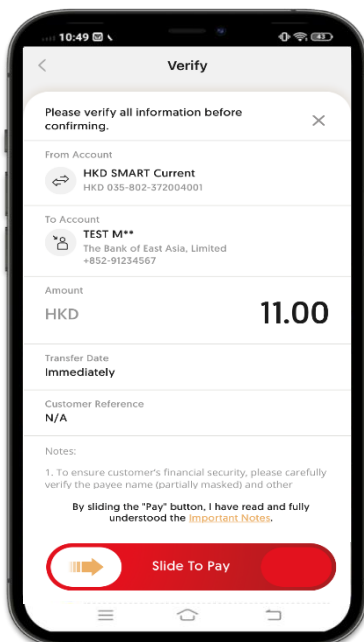
3 Select "from account"



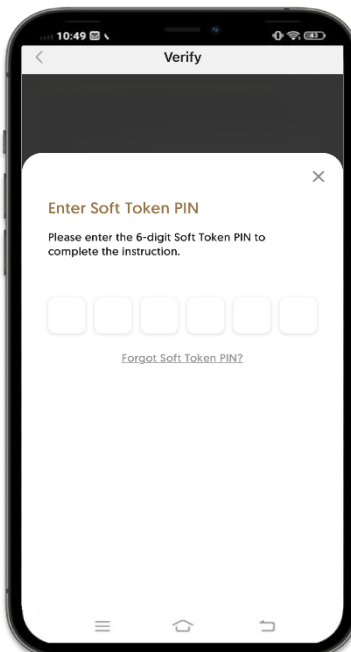
4 Enter transaction details



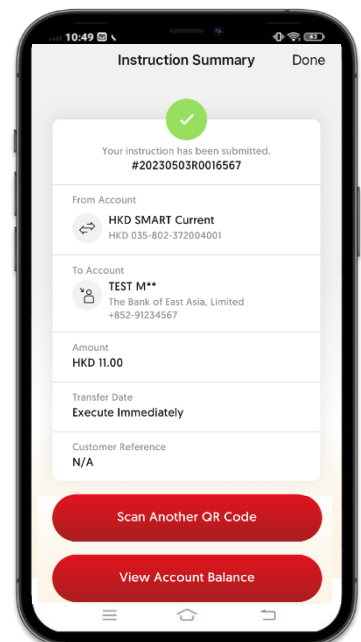
5 Review the details and submit the instruction



6 Input SMS OTP or Soft token PIN



7 Your instruction is submitted



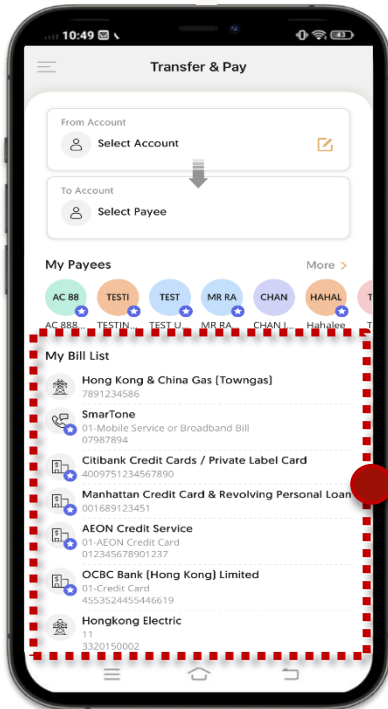
* If user do not register soft token before, user can use SMS OTP as authentication.

1 Transfer & Pay

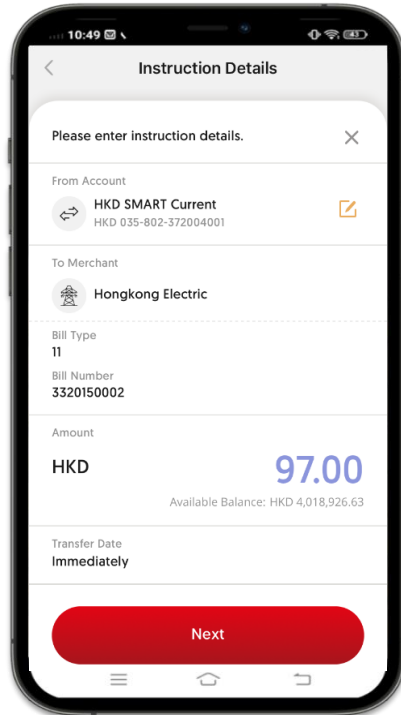


11) Bill Payment (Registered bill template)

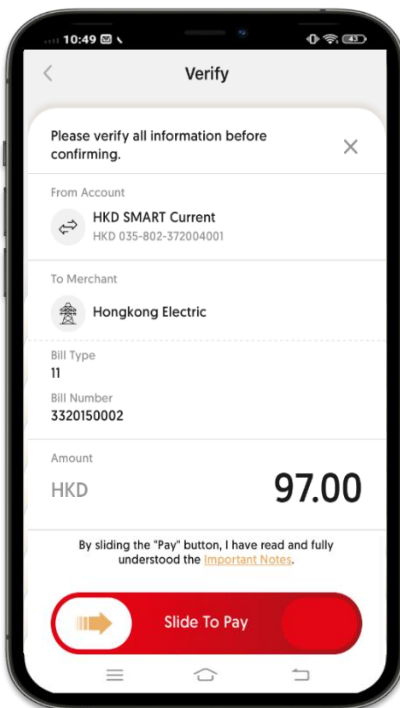
1 Select bill template



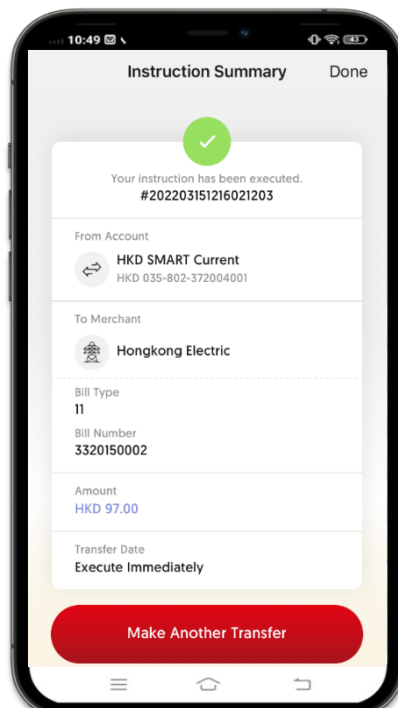
2 Enter transaction details



3 Review the details and submit the instruction



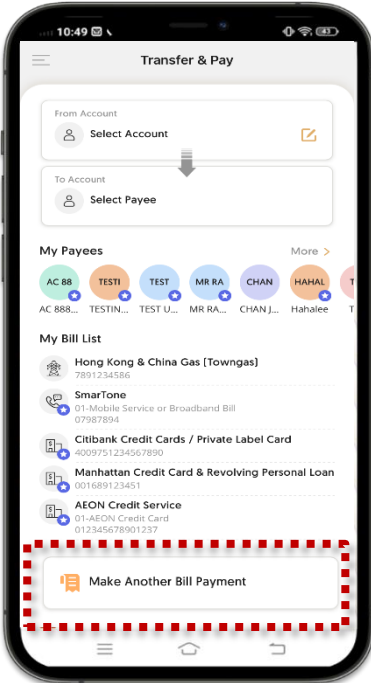
4 Your instruction is submitted



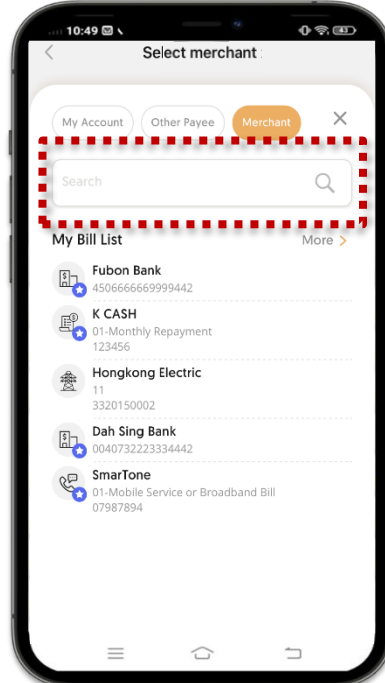
1 Transfer & Pay

12) Bill Payment (Non-Registered bill template)

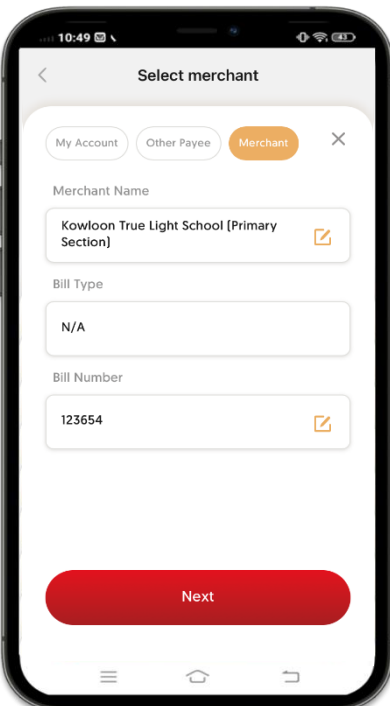
1 Select "Make Another Bill Payment" button



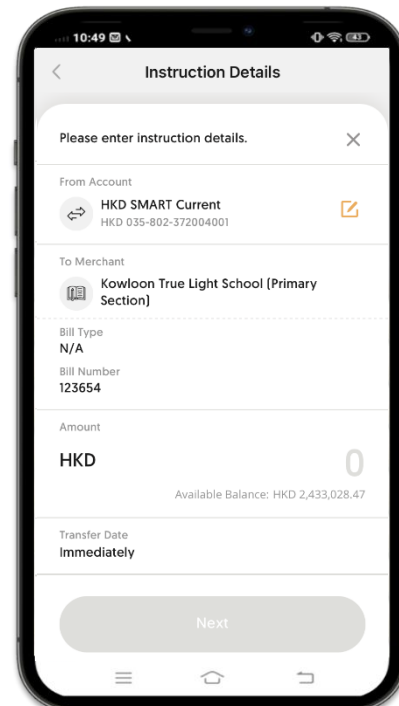
2 Search the merchant



3 Enter Merchant details



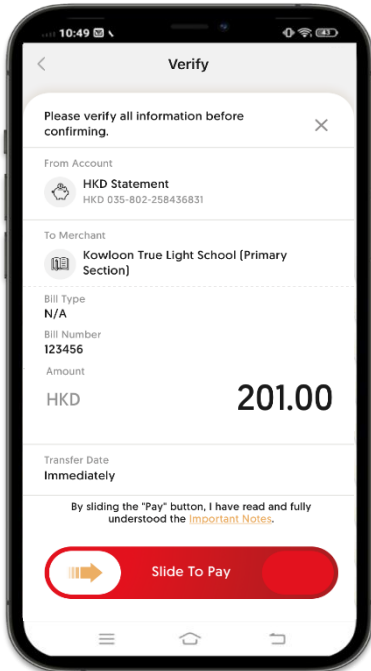
4 Enter transaction details



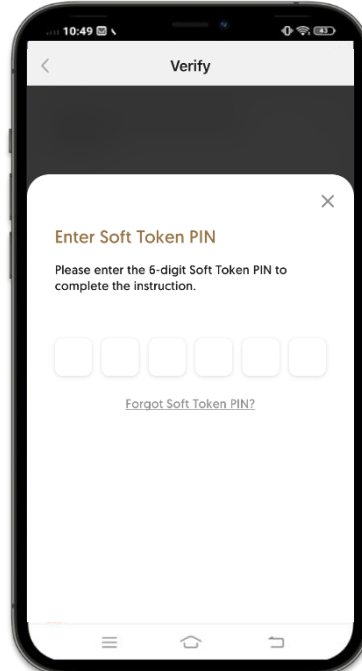
1 Transfer & Pay

12) Bill Payment (Non-Registered bill template) (CONT'D)

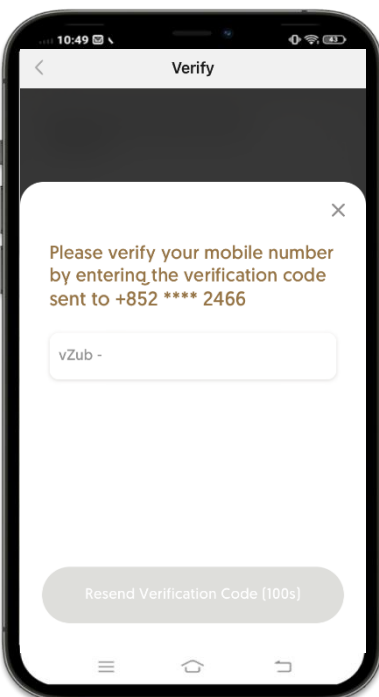
5 Review the details and submit the instruction



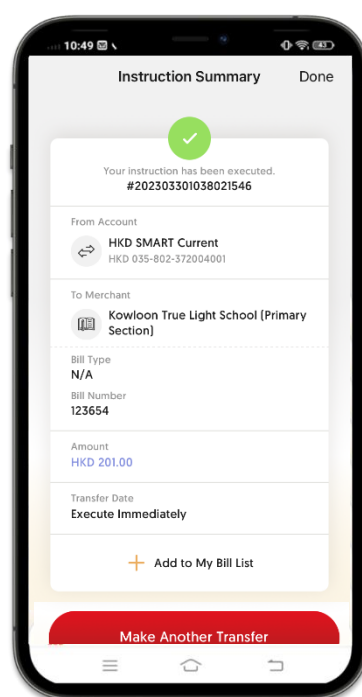
6 Enter Soft token PIN for authentication



7 Enter SMS OTP (1st time high-risk transaction after soft token effective)



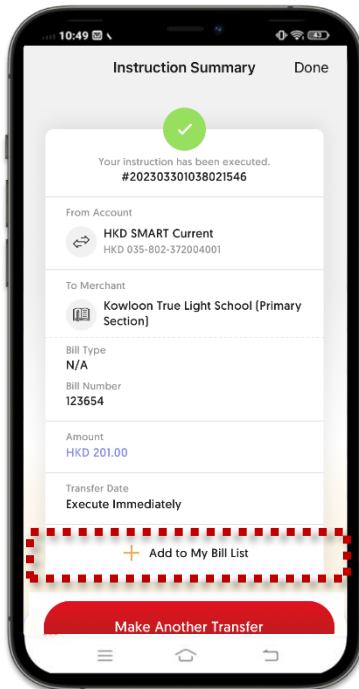
8 Your instruction is submitted



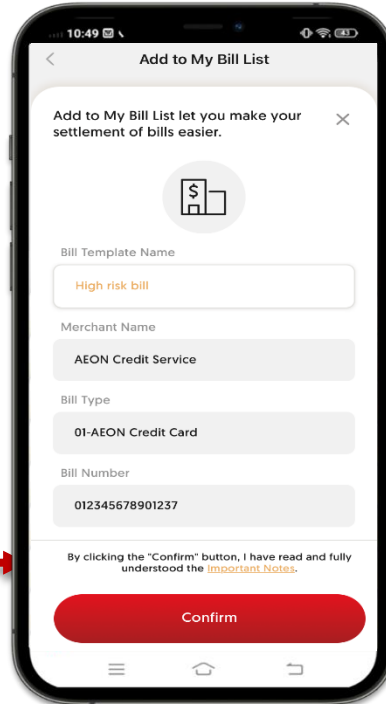
1 Transfer & Pay

13) Register bill template after bill payment to non-registered bill merchant

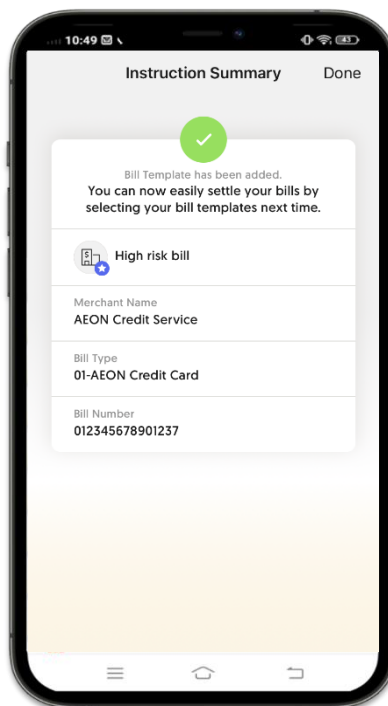
1 Your instruction is submitted



2 Enter "Bill template Name"



3 Your instruction is submitted (Bill template will be effective instantly)

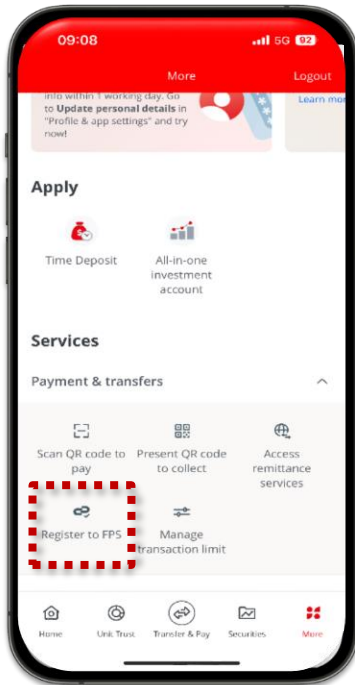


1 Transfer & Pay

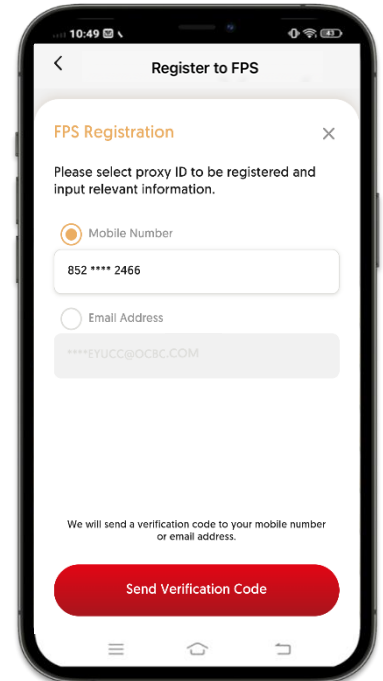


14) FPS Registration

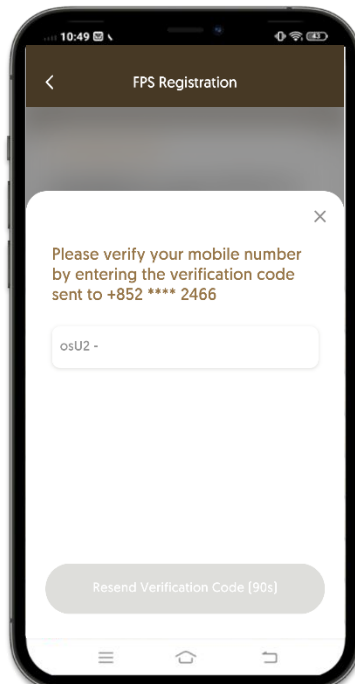
1 Select “Register to FPS” from More menu



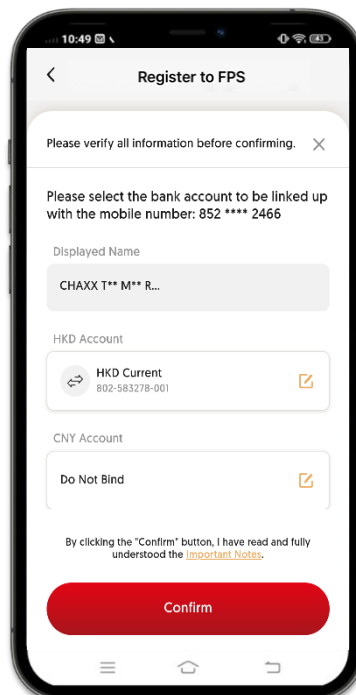
2 Select proxy and click “Send Verification Code”



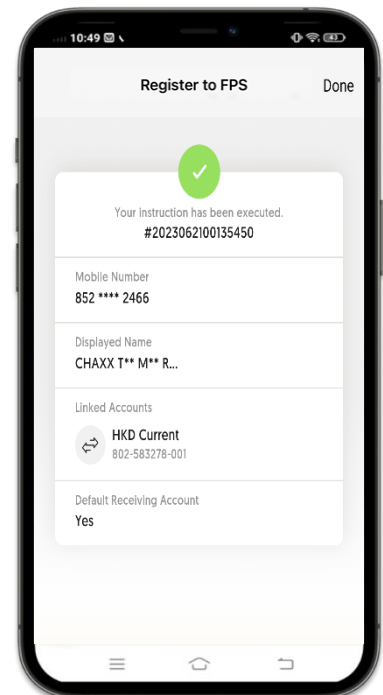
3 Input OTP



4 Confirm receiving account



5 FPS registration is successful



Remarks:

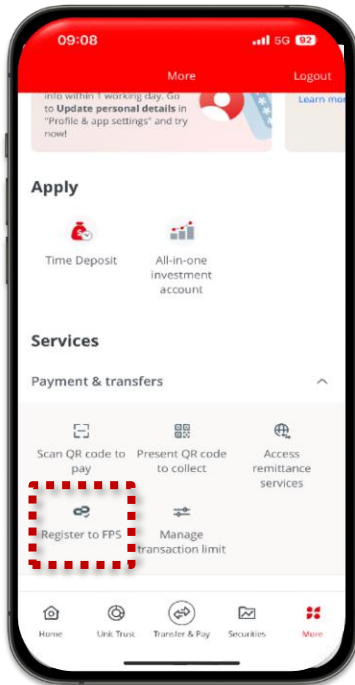
- Register your **mobile number** & **HKID number** as an FPS proxy requires SMS OTP authentication
- Register your **email address** as an FPS proxy requires Email OTP authentication

1 Transfer & Pay

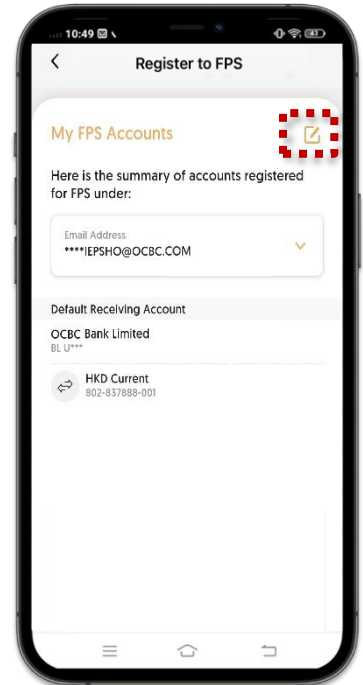
15) FPS De-registration



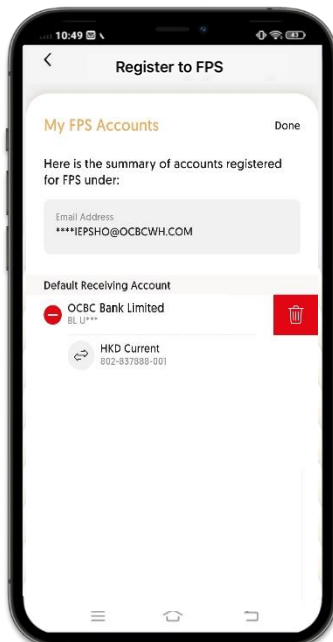
- 1 Select "Register to FPS" from More menu



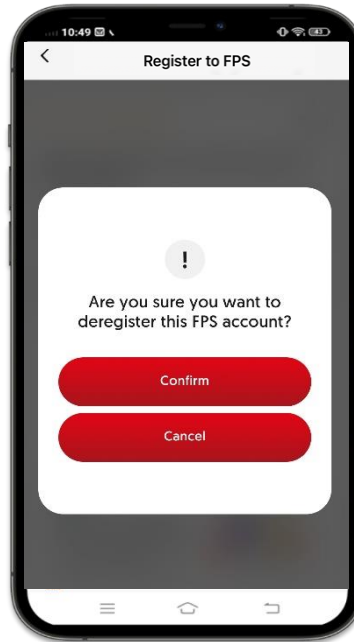
- 2 Select proxy and click "Edit" button



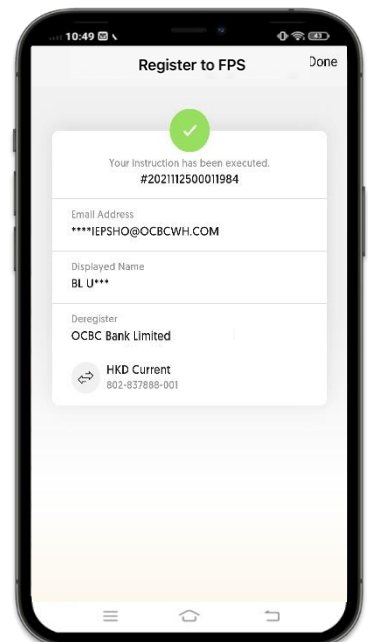
- 3 Click on "-" button and "bin" button



- 4 Click on "Confirm" button



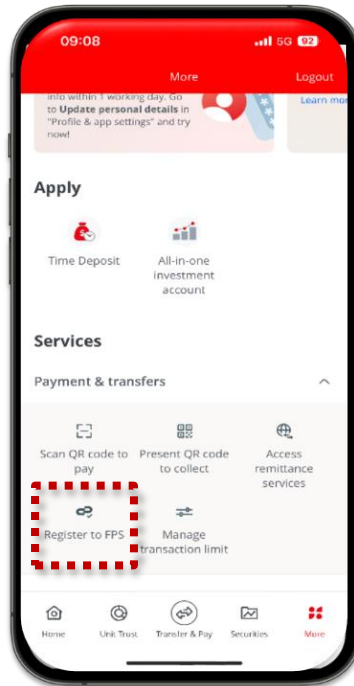
- 5 FPS de-registration is successful



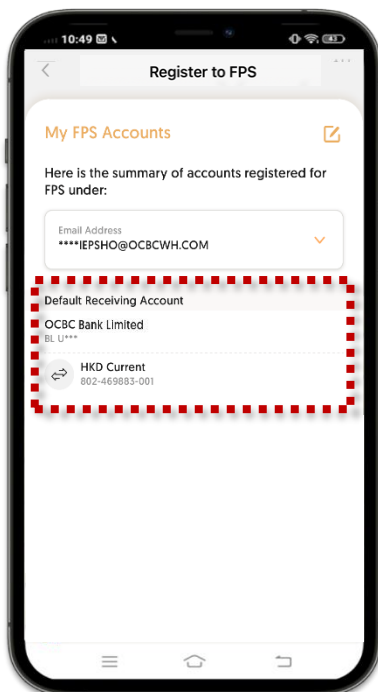
1 Transfer & Pay

16) Amend FPS Receiving Account

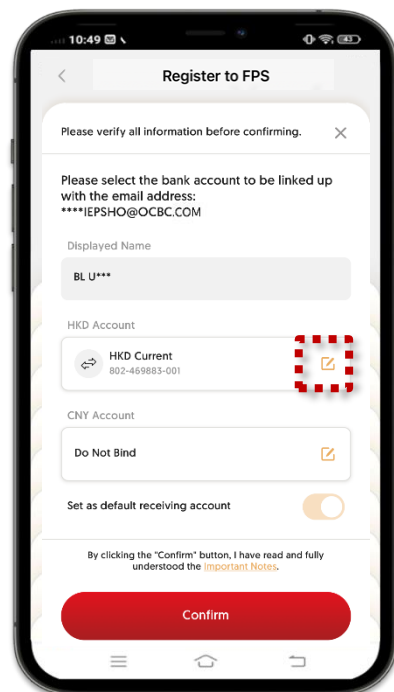
- 1 Select "Register to FPS" from More menu



- 2 Select FPS proxy and click on receiving account



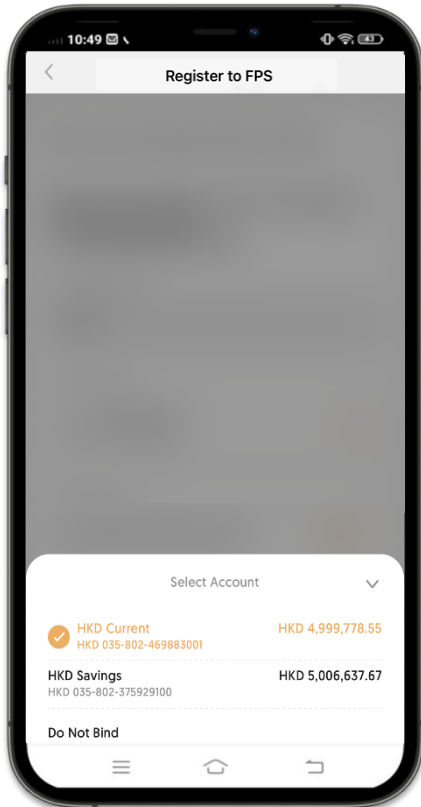
- 3 Click on "Edit" button



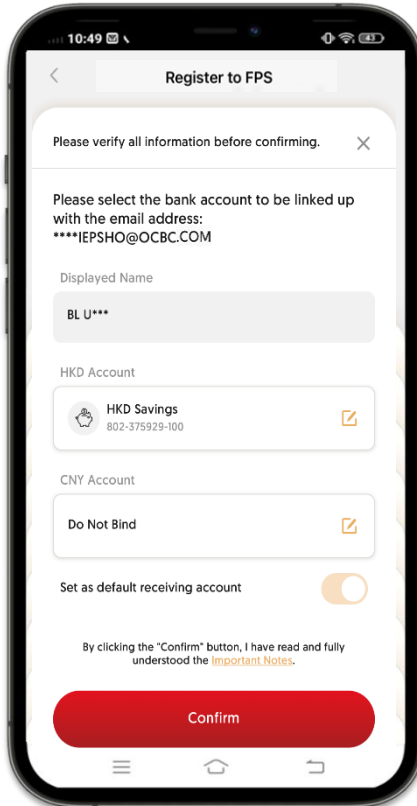
1 Transfer & Pay

16) Amend FPS Receiving Account (CONT'D)

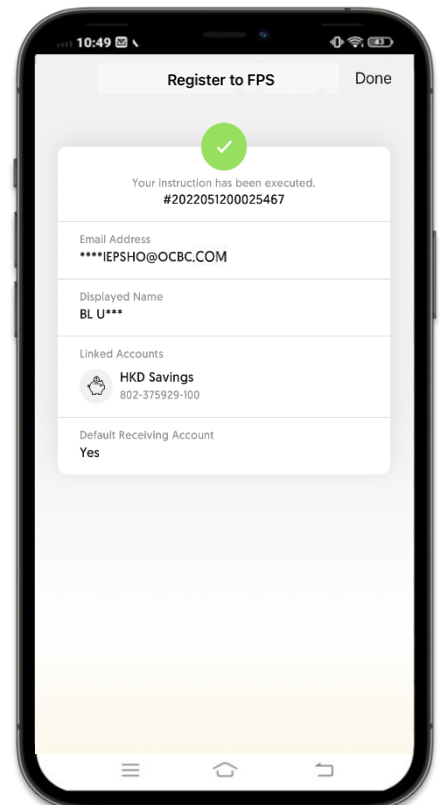
5 Select a new receiving account



6 Review the details and submit the instruction



7 Receiving account is updated

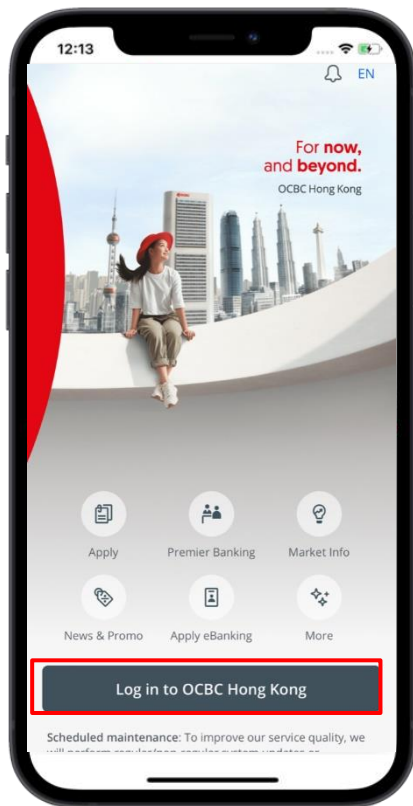


2 eIPO & Financing

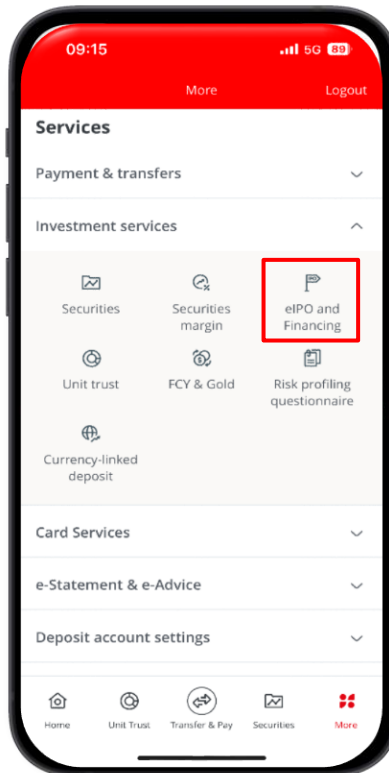


Start eIPO subscription

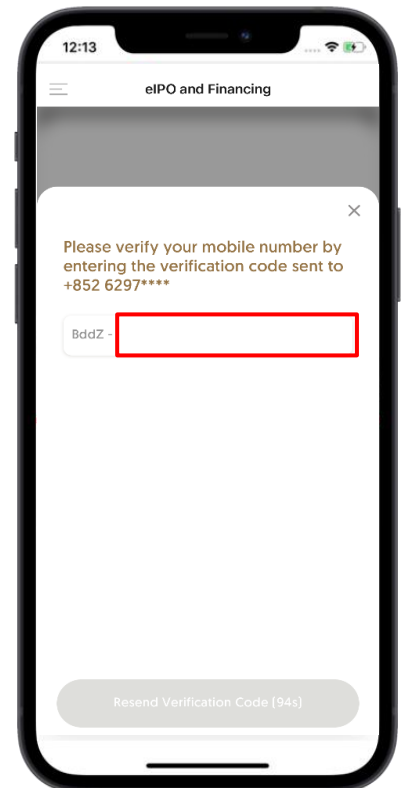
1 Login Mobile Banking



2 Click “eIPO and Financing”



3 Input SMS OTP

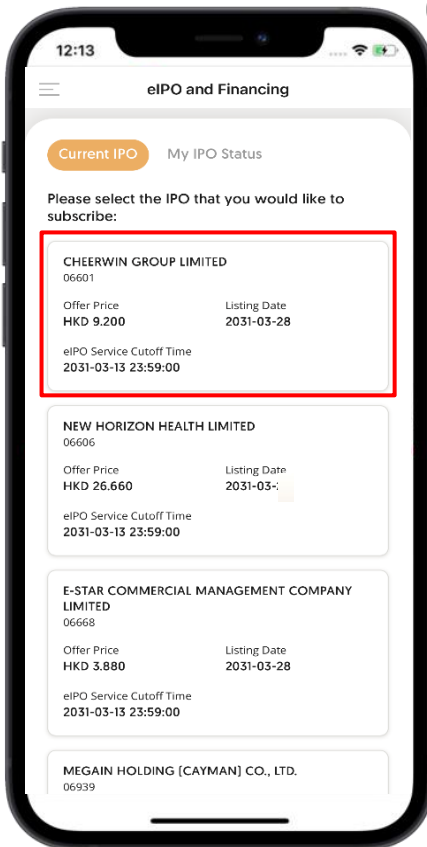


2 eIPO & Financing

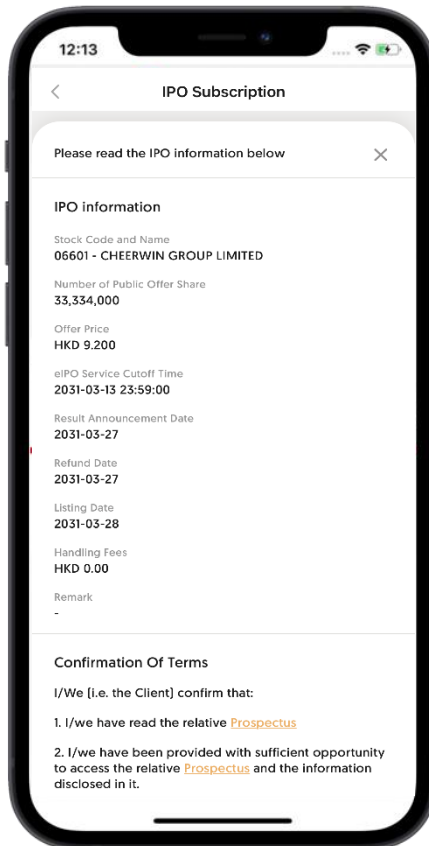


Select IPO & confirm the Terms & Conditions

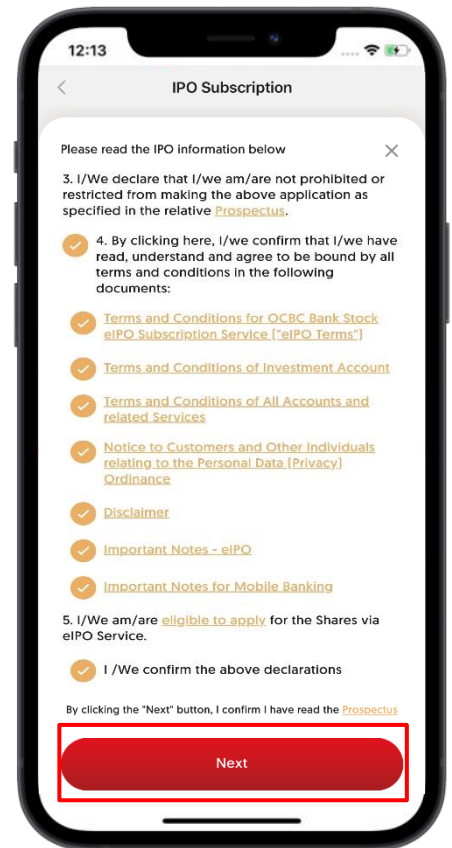
4 Select IPO that you want to subscribe



5 Read the IPO information and confirm the Terms & Conditions



6 Press "Next" button to continue

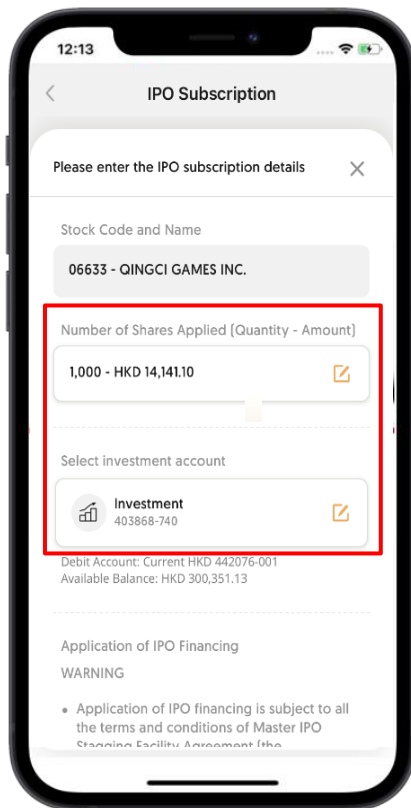


2 eIPO & Financing



Choose IPO options

7 Select Number of Shares Applied & investment Account



IPO Subscription

Please enter the IPO subscription details

Stock Code and Name
06633 - QINGCI GAMES INC.

Number of Shares Applied [Quantity - Amount]
1,000 - HKD 14,141.10

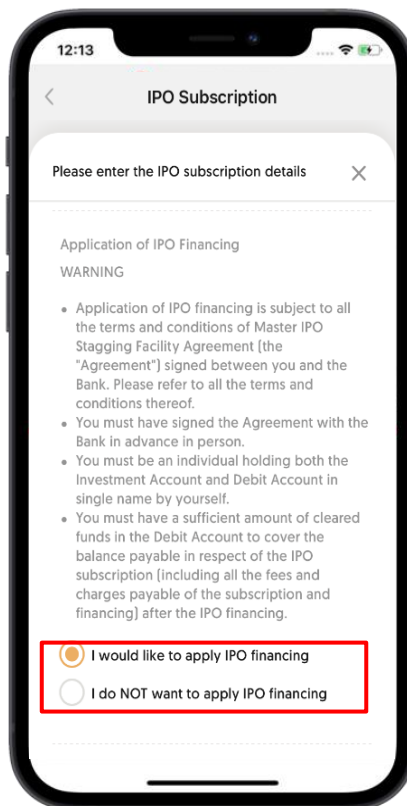
Select investment account
Investment
403868-740

Debit Account: Current HKD 442076-001
Available Balance: HKD 300,351.13

Application of IPO Financing
WARNING

- Application of IPO financing is subject to all the terms and conditions of Master IPO Staggering Facility Agreement (the

8 Option to select IPO financing or not



IPO Subscription

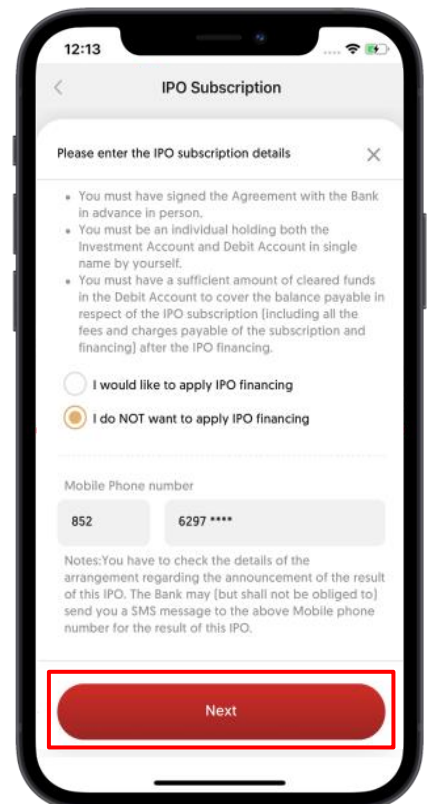
Please enter the IPO subscription details

Application of IPO Financing
WARNING

- Application of IPO financing is subject to all the terms and conditions of Master IPO Staggering Facility Agreement (the "Agreement") signed between you and the Bank. Please refer to all the terms and conditions thereof.
- You must have signed the Agreement with the Bank in advance in person.
- You must be an individual holding both the Investment Account and Debit Account in single name by yourself.
- You must have a sufficient amount of cleared funds in the Debit Account to cover the balance payable in respect of the IPO subscription (including all the fees and charges payable of the subscription and financing) after the IPO financing.

☒ I would like to apply IPO financing
☐ I do NOT want to apply IPO financing

9 Read the Notes and press "Next" button to continue



IPO Subscription

Please enter the IPO subscription details

- You must have signed the Agreement with the Bank in advance in person.
- You must be an individual holding both the Investment Account and Debit Account in single name by yourself.
- You must have a sufficient amount of cleared funds in the Debit Account to cover the balance payable in respect of the IPO subscription (including all the fees and charges payable of the subscription and financing) after the IPO financing.

☐ I would like to apply IPO financing
☒ I do NOT want to apply IPO financing

Mobile Phone number
852 6297 ****

Notes: You have to check the details of the arrangement regarding the announcement of the result of this IPO. The Bank may (but shall not be obliged to) send you a SMS message to the above Mobile phone number for the result of this IPO.

Next

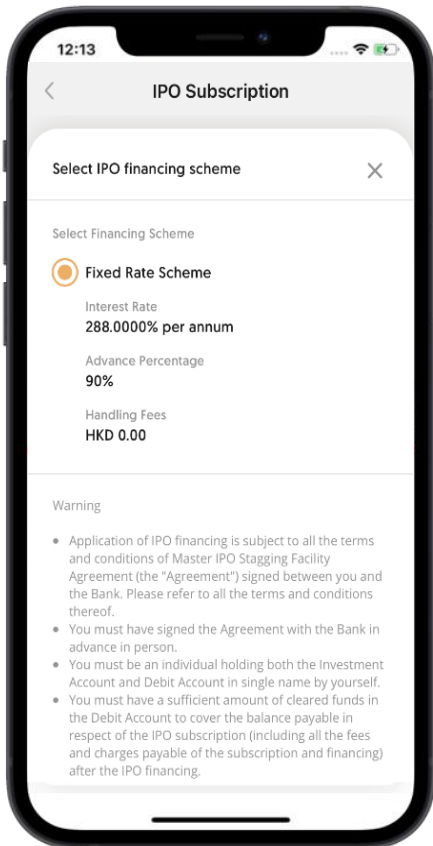
Note: To avoid submission failure, please ensure that there is sufficient available balance in the debit account.



Select Financing Scheme (if apply for IPO financing)

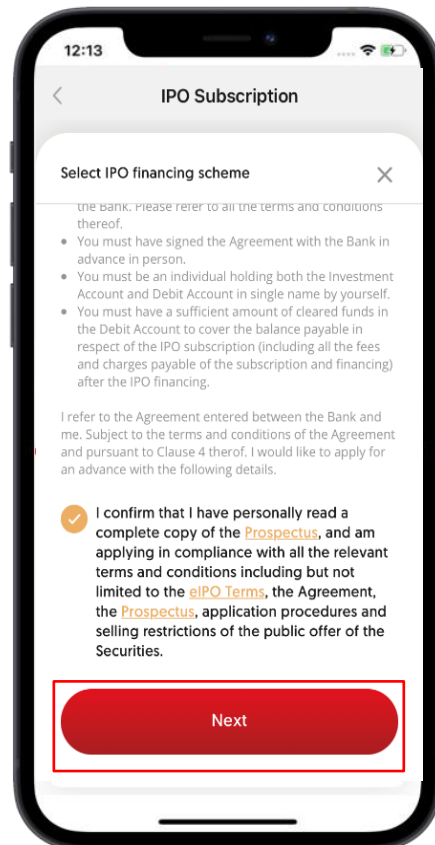
10

Select the Financing Scheme (if apply IPO Financing)



11

Read the T&C and press “Next” button to continue



3
0

2 eIPO & Financing



Confirm IPO subscription

12 Review IPO information

12:13

< Confirmation of IPO Information

Please confirm the IPO information below X

IPO information

Stock Code and Name
06601 - CHEERWIN GROUP LIMITED

Number of Shares Applied
500

Subscription Amount
HKD 4,646.35

Handling Fees
HKD 0.00

Total Debit Amount
HKD 4,646.35

Select Accounts

Investment Account
Investment 666668-740

Debit Account
Current HKD 832980-001

Personal Information

Mobile Phone number
[852] 6117 ****

You will receive an IPO application reference number after clicking 'Confirm' button displayed at the end of this page and you should keep this IPO application reference number for record purposes. If you DO NOT receive an IPO application

13 Confirm the IPO subscription

12:13

< Confirmation of IPO Information

Please confirm the IPO information below X

Total Debit Amount
HKD 4,646.35

Select Accounts

Investment Account
Investment 666668-740

Debit Account
Current HKD 832980-001

Personal Information

Mobile Phone number
[852] 6117 ****

You will receive an IPO application reference number after clicking 'Confirm' button displayed at the end of this page and you should keep this IPO application reference number for record purposes. If you DO NOT receive an IPO application reference number, please contact the Bank's service hotline at 28159919 during office hour (Mon-Fri 09:00-17:30, Sat 09:00-13:00) for assistance.

☒ I have personally read and agree the [terms & condition and important notes](#).

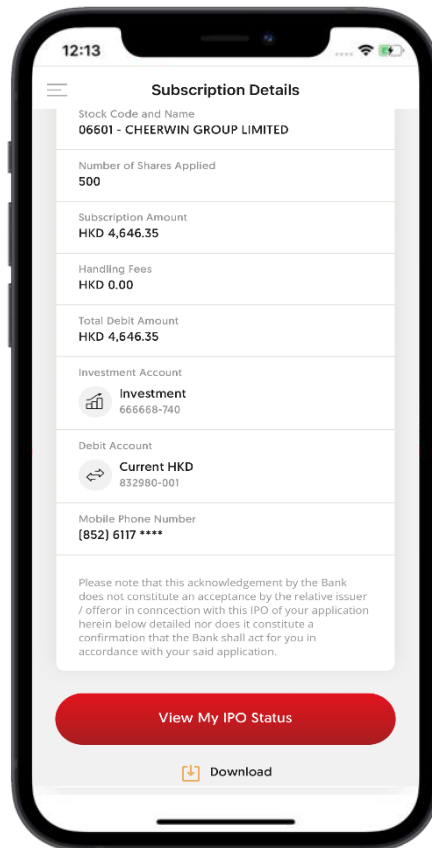
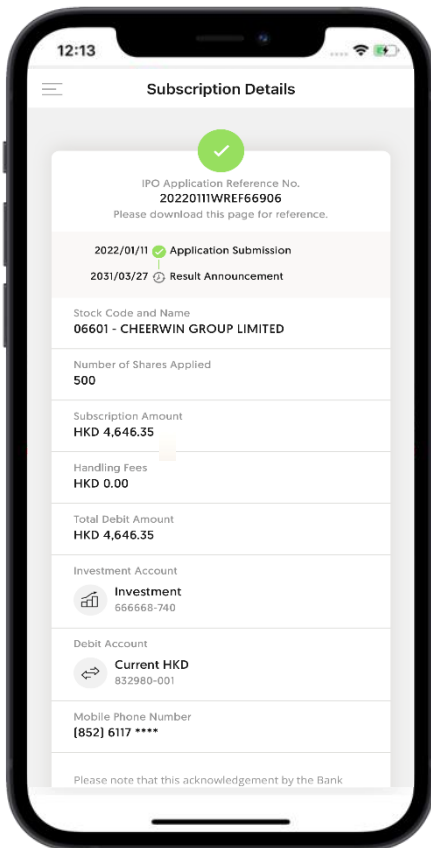
Slide To Confirm



Completed IPO Subscription

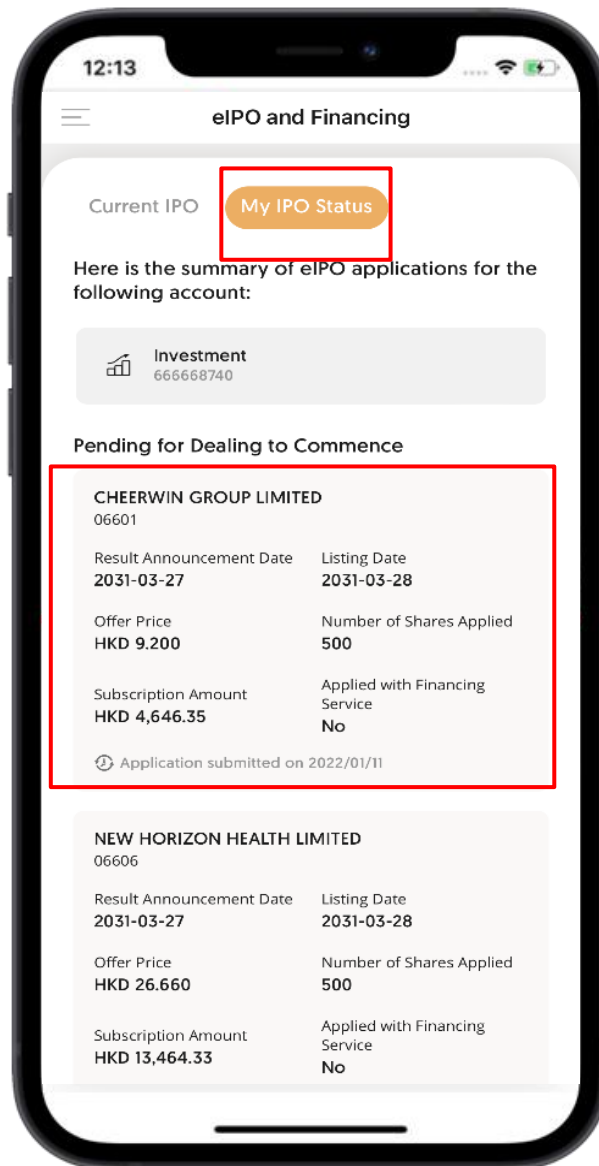
14

The IPO Subscription is completed



View My IPO status

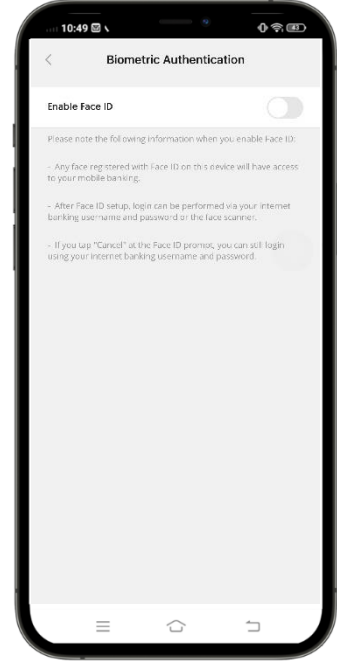
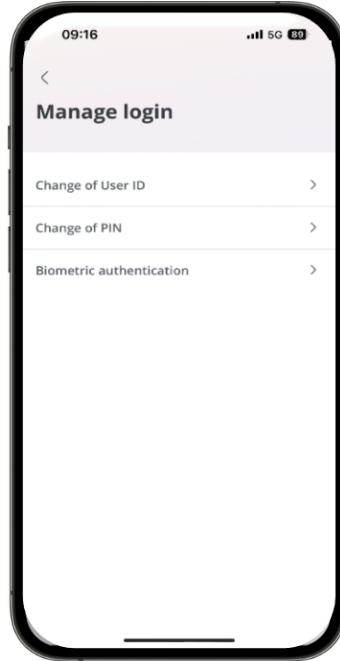
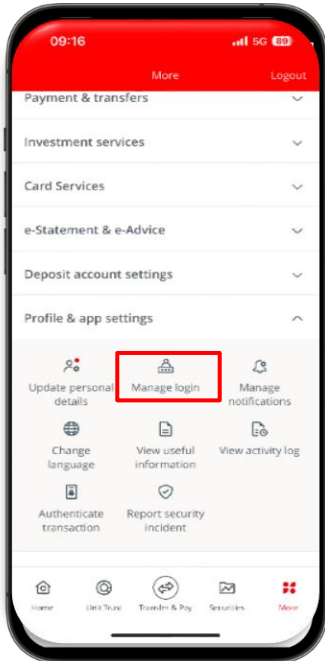
Click “My IPO Status” to view the IPO that you have subscribed



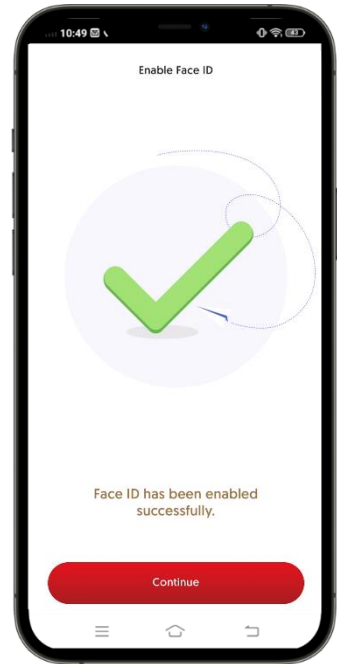
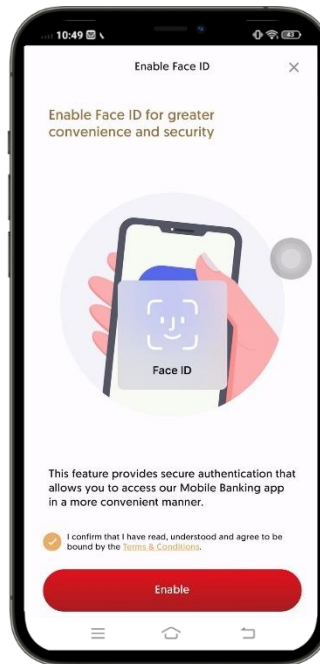
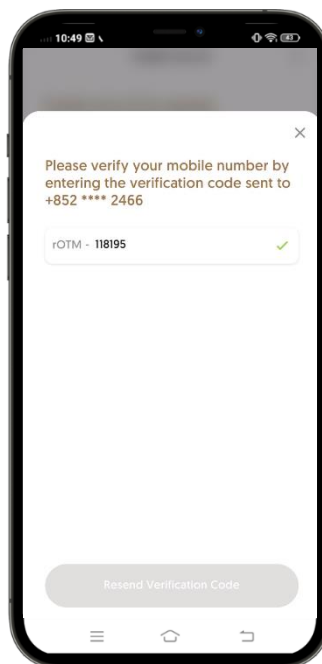
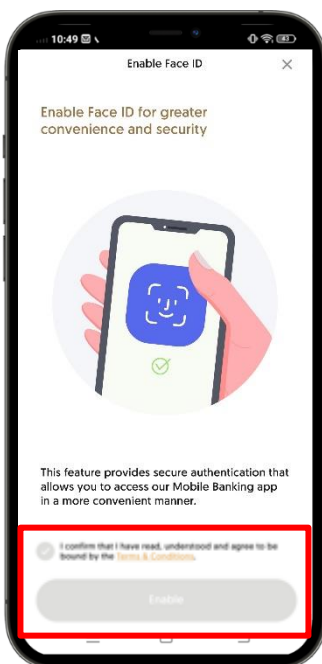
3 Biometric Logon

Biometric Registration

- 1 Login Personal Mobile Banking;
Select **Manage login** on More menu
- 2 Select **Biometric Authentication**
- 3 Switch the Toggle button of **Enable Face ID/ Touch ID/ Fingerprint**



- 4 - Check the T&C checkbox
- Click on **"Enable"** button
- 5 Insert **SMS OTP**
- 6 Scan **Face ID / Touch ID / Fingerprint**
- 7 **Completed**

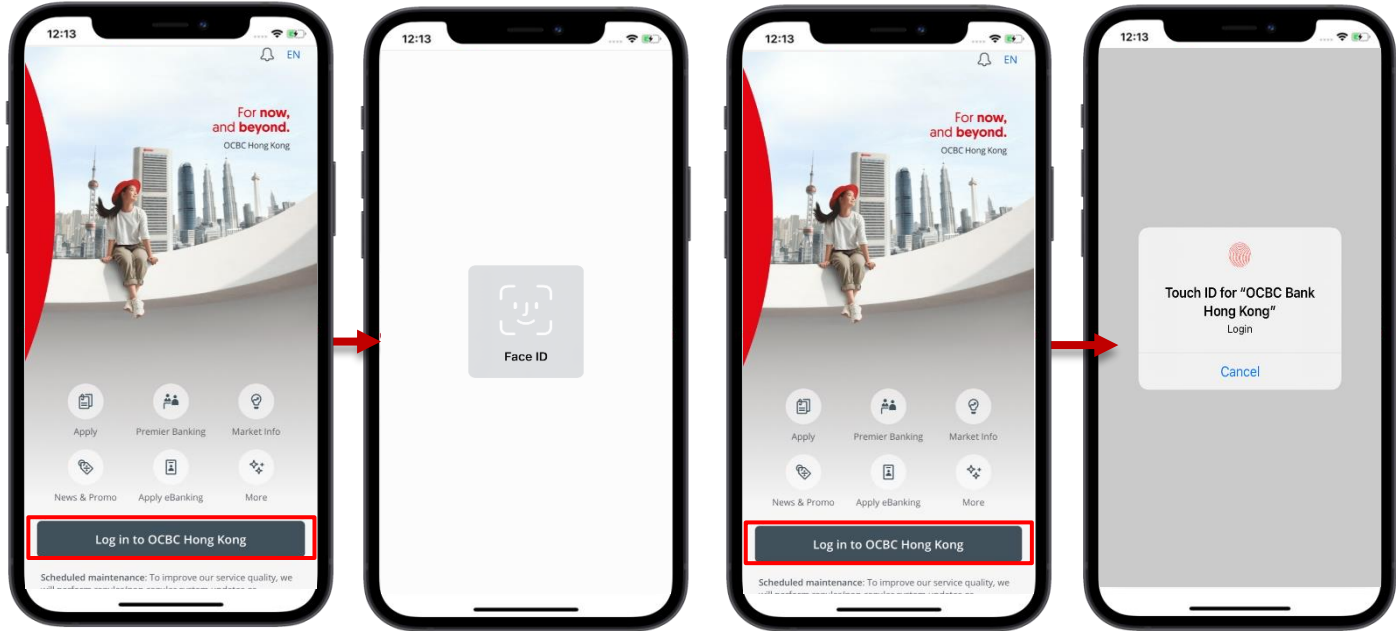


3 Biometric Logon

Biometric Logon

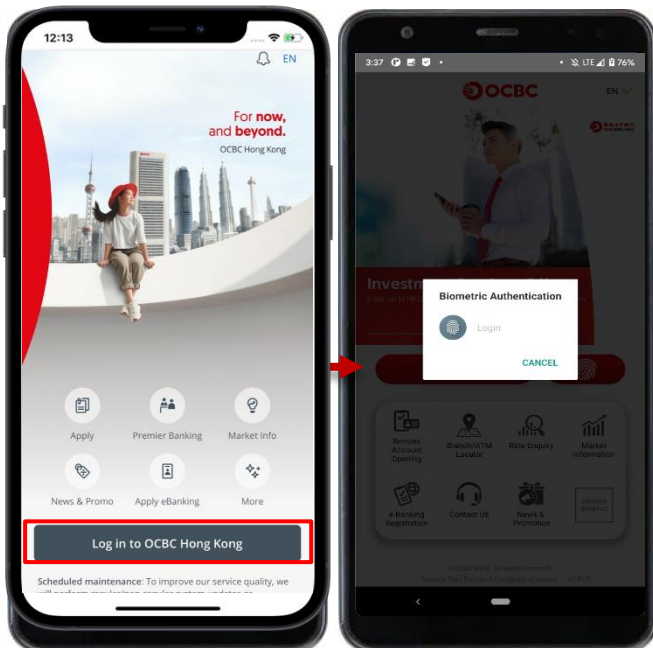
iPhone User - Support Face ID or Touch ID

- After registered biometric (**Face ID**) and open the Personal Mobile Banking
- After registered biometric (**Touch ID**) and open the Personal Mobile Banking



Android User - Support Fingerprint only

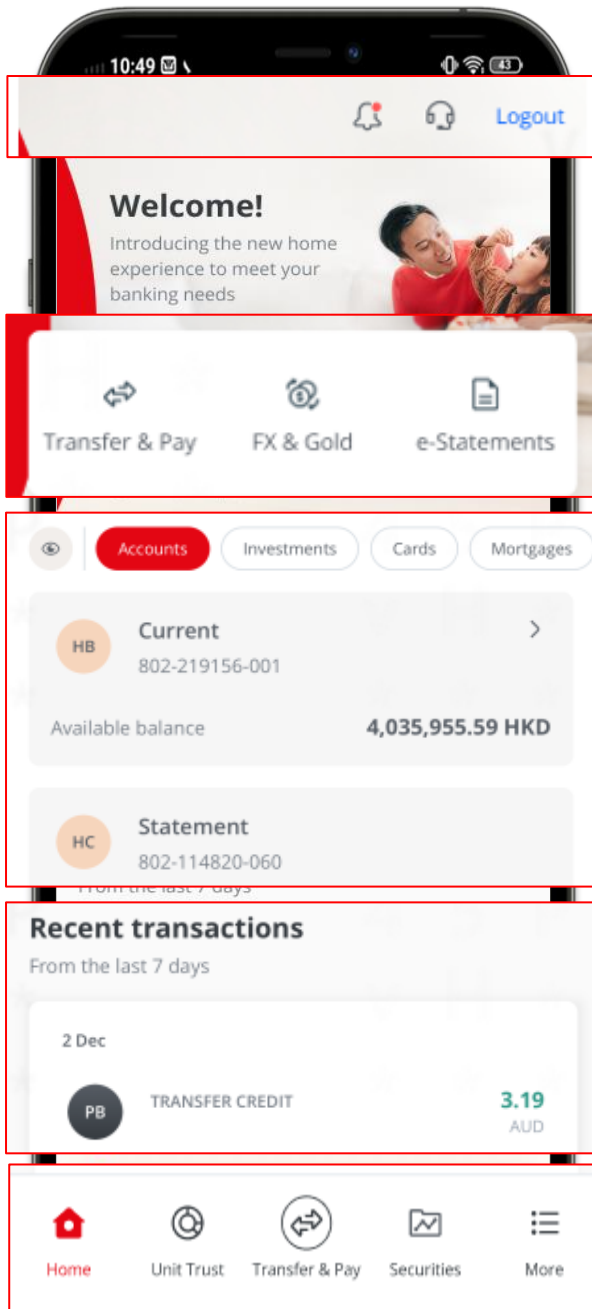
- After registered biometric (**Fingerprint**) and open the Personal Mobile Banking



4 My Portfolio

Introducing the new home experience to meet your banking needs

- New user interface



NEW

Top navigation

NEW

Shortcuts

NEW

Product navigation

NEW

Recent transactions

NEW

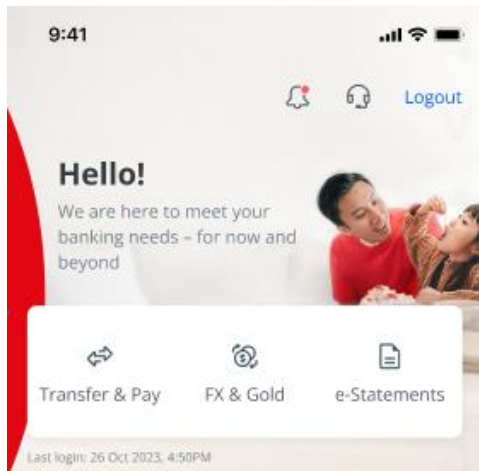
Refreshed common bottom menu

4 My Portfolio



Product navigation

- New user interface



Mortgage

IL	Mortgage Loan 001492-761	>
	Payment due on 8 Dec	1,940.00 AUD
IL	Mortgage Loan 040856-760	>
	Payment due on 8 Dec	20,712.00 HKD

Accounts

WMC	Accounts	Investments	Cards
IAS	Integrated Account Statement 805-403409-831	>	
	7,900.00 HKD Hong Kong Dollars	>	
	800.00 AUD Australian Dollars	>	
	800.00 CAD Canadian Dollars	>	
	See 3 more	▼	
	HKD equivalent	1,486,151.03 HKD	

Investment

WMC	Accounts	Investments	Cards
UT	Unit Trusts	>	
	Investment 666668-740	>	
	Market value	16,320.00 HKD	
	Total market value	16,320.00 HKD	
S	Securities	>	
	Investment 666668-740	>	
	Market value	16,320.00 HKD	
	Total market value	16,320.00 HKD	

Cards

ts	Cards	Mortgages	Net worth
	Premier VOYAGE 3454-1234-5678-8888	>	
	Current balance	2,000.00 HKD	
	Statement balance due on 31 Jul	1,343.00 HKD	

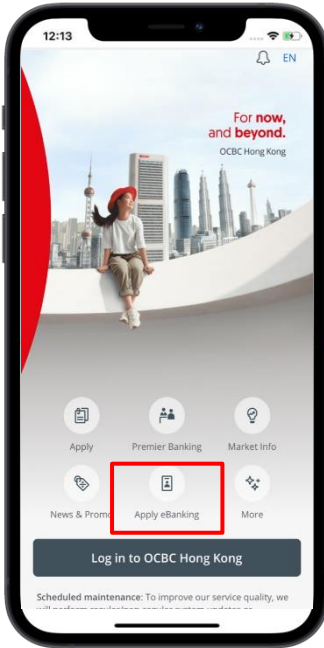
Net worth

nts	Cards	Mortgages	Net worth
	Assets ⓘ		
	1,769,000.00 HKD		
	Liabilities ⓘ		
	112,354.00 HKD		

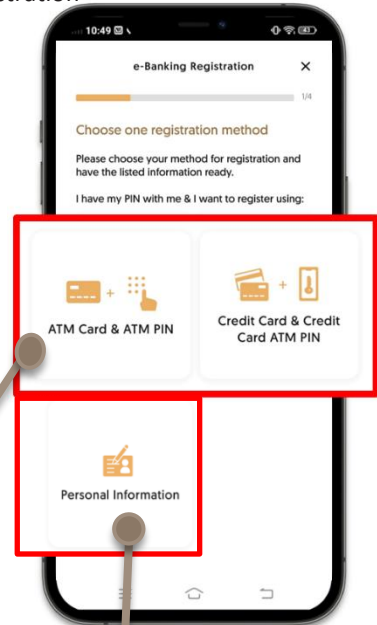
5 e-Banking Registration

How to register for Personal e-Banking Services in Mobile App?

- 1 Go to Login page and press **Apply eBanking**



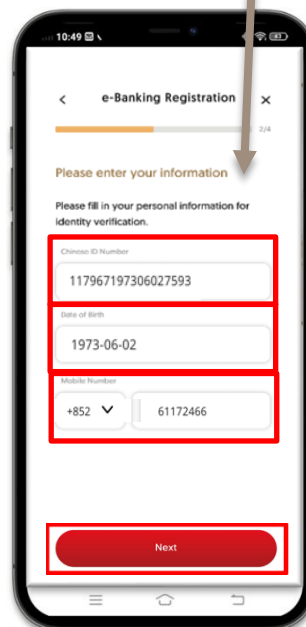
- 2 Select **ATM card or Credit Card or Personal Information (For Wealth Management Connect Southbound Customer only)** for registration



- 3 Input Card number and ATM PIN. Then click **Next**

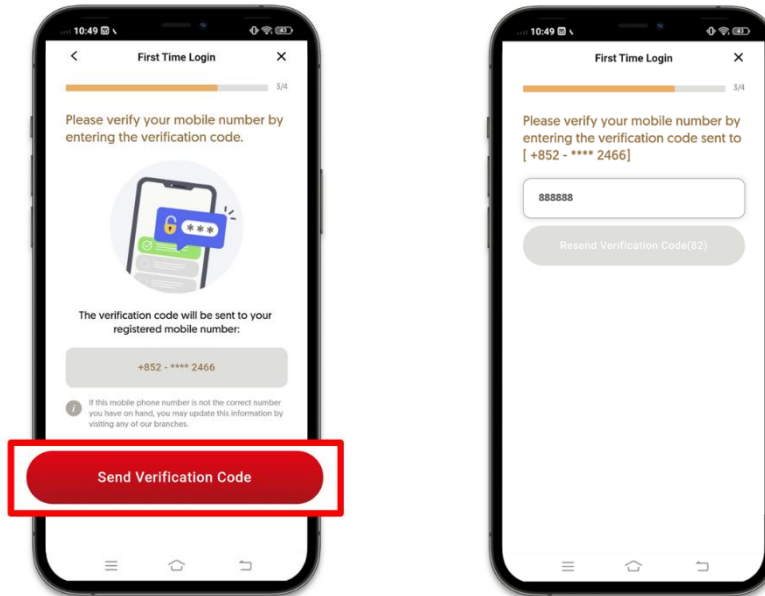


- 3 Input Chinese ID Number, Date of Birth and Mobile Number Then click **Next**

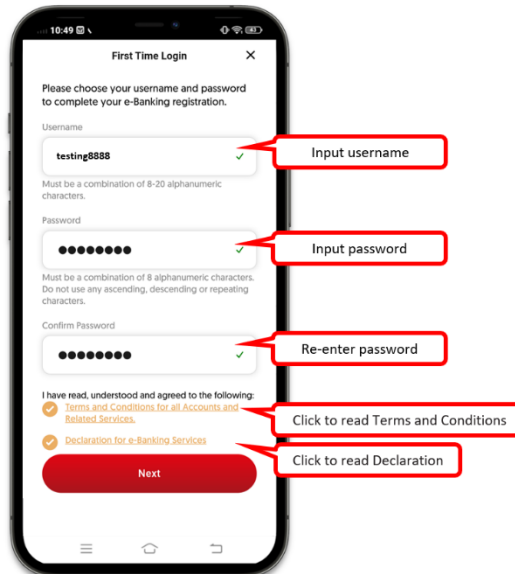


5 e-Banking Registration

4 Click **Send Verification Code** to receive SMS and input one-time password (OTP)



5 Set up self-assigned **Username** and **Password**
Click to read **Terms and Conditions & Declaration**



Customer can login personal e-Banking right away upon successful registration

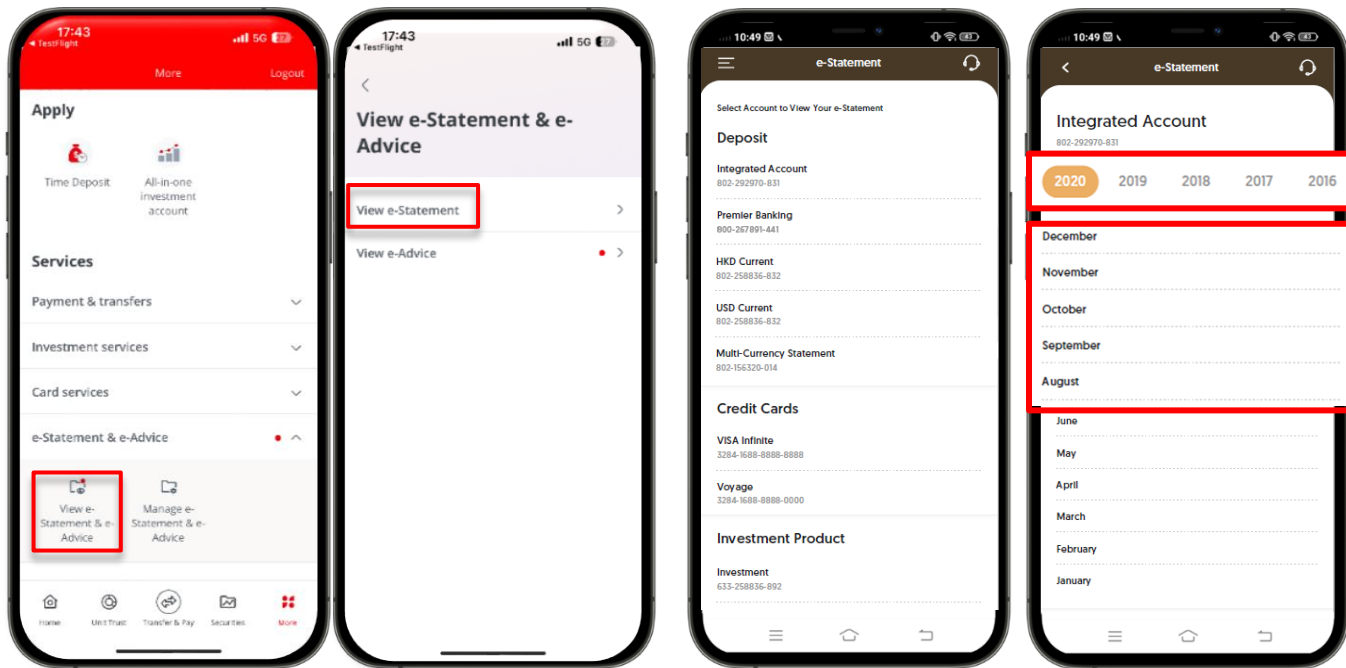
6 View e-Statement & e-Advice



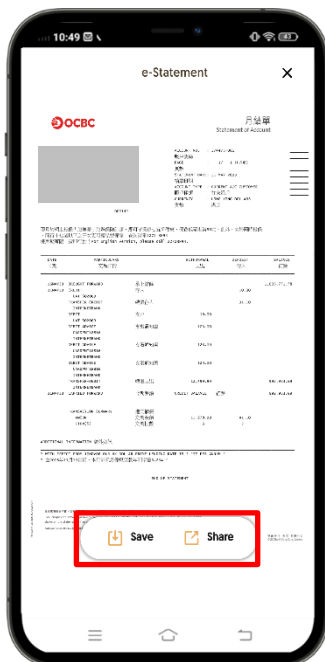
View and Download e-Statement on Mobile Banking

1 Login Personal Mobile Banking & Select **View e-Statement & e-Advice** on More Menu

2 Select **View e-Statement**, then tap on the account and statement you would like to check



3 View e-Statement in PDF format and you may press “Save” / “Share” button to download / share the document



e-Statement & e-Advice services on Mobile Banking including:

e-statements / e-Advice belongs to Current Account, Statement Account, Multi-currency Statement Account, Overnight Plus Account, Integrated Account, Premier Banking, Investment products, Securities Account, Securities Margin Account, Credit Card, Revolving Credit and Mortgage Loan e.t.c.

Press “Save” or “Share” button to download up to past 7 years of e-Statement / past 3 months of e-Advice to your trusted mobile device or a third-party app. Since the e-Statement & e-Advice contain your personal information, please keep it safe for your own record.

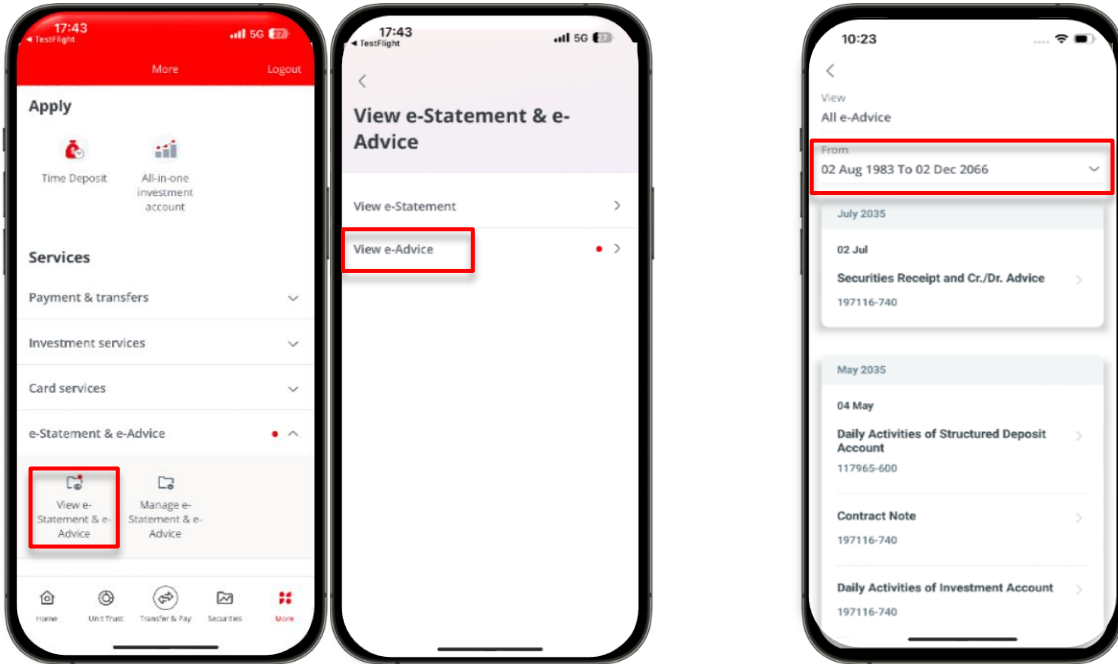
You are required to install Adobe Reader and Chinese Traditional Font Pack on personal computers and mobile device in order to view, print and download the e-Statement and e-advice in PDF format.

⑥ View e-Statement & e-Advice



View and Download e-Advice on Mobile Banking

- 1 Login Personal Mobile Banking & Select **View e-Statement & e-Advice** on More Menu
- 2 Tap **View e-Advice**, followed by select desired date range, then all corresponding e-Advice will be displayed (if any)



- 3 View e-Advice in PDF format and you may press “Save” / “Share” button to download / share the document



e-Statement & e-Advice services on Mobile Banking including:

e-statements / e-Advice belongs to Current Account, Statement Account, Multi-currency Statement Account, Overnight Plus Account, Integrated Account, Premier Banking, Investment products, Securities Account, Securities Margin Account, Credit Card, Revolving Credit and Mortgage Loan e.t.c.

Press “Save” or “Share” button to download up to past 7 years of e-Statement / past 3 months of e-Advice to your trusted mobile device or a third-party app. Since the e-Statement & e-Advice contain your personal information, please keep it safe for your own record.

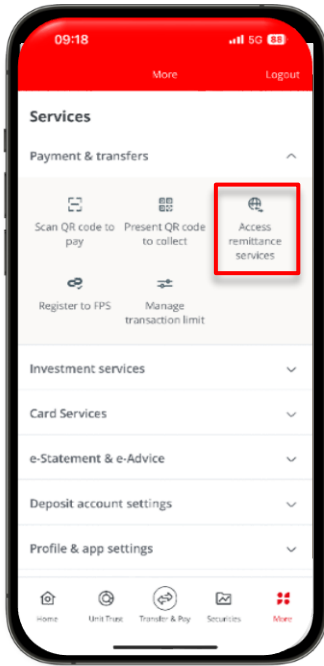
You are required to install Adobe Reader and Chinese Traditional Font Pack on personal computers and mobile device in order to view, print and download the e-Statement and e-advice in PDF format.

7 Remittance Services

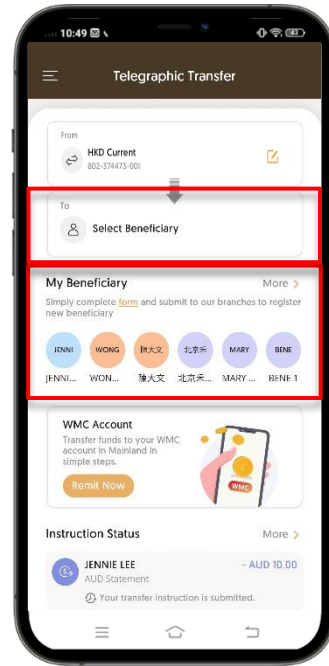


Telegraphic Transfer: Remit to registered beneficiary

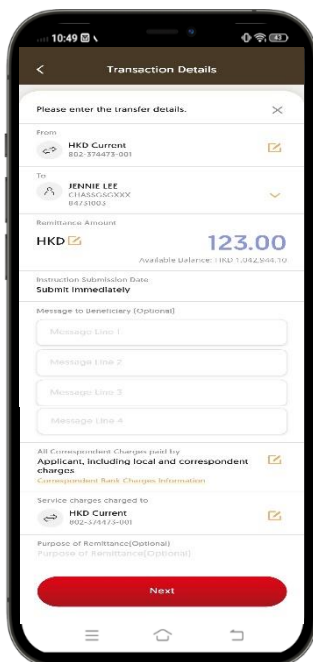
1 Login Personal Mobile Banking;
Select **Access remittance services** on More menu and tap on “Telegraphic Transfer”



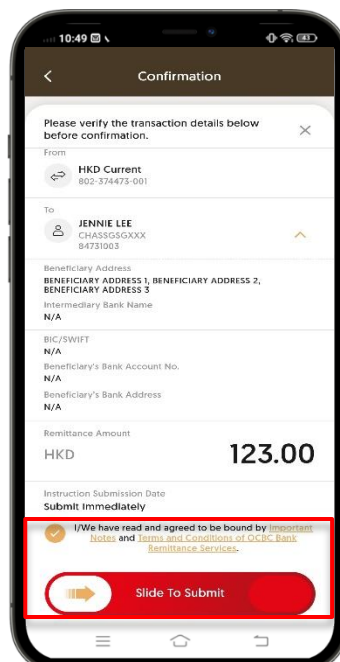
2 Select Beneficiary



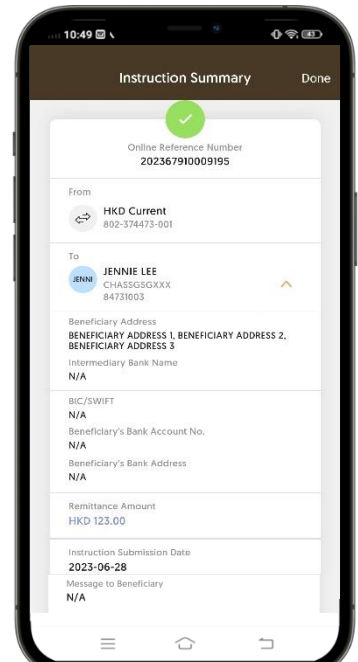
3 Enter Transaction Details



4 Confirm inputted details and acknowledge Terms & Conditions

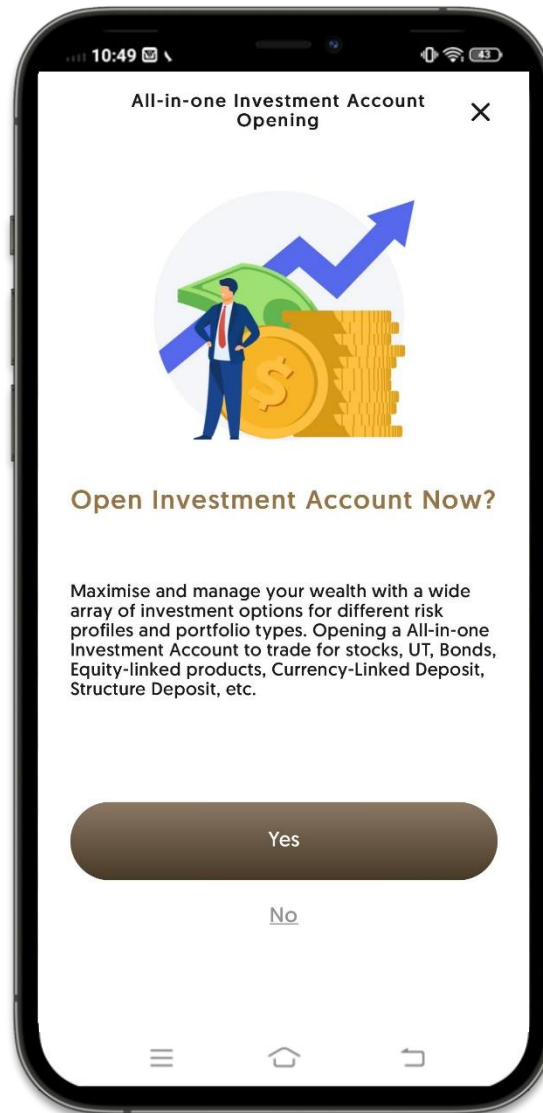


5 Instruction Submitted



8 All-in-one Investment Account Opening

You can now open an All-in-one Investment Account via your mobile. In just **5** simple steps, Investment Account, Currency-linked Deposit Account and Structured Deposit Account will be opened in one go. You then can perform different types of investment whenever you want!



Before you start opening an All-in-one Investment Account, make sure you:

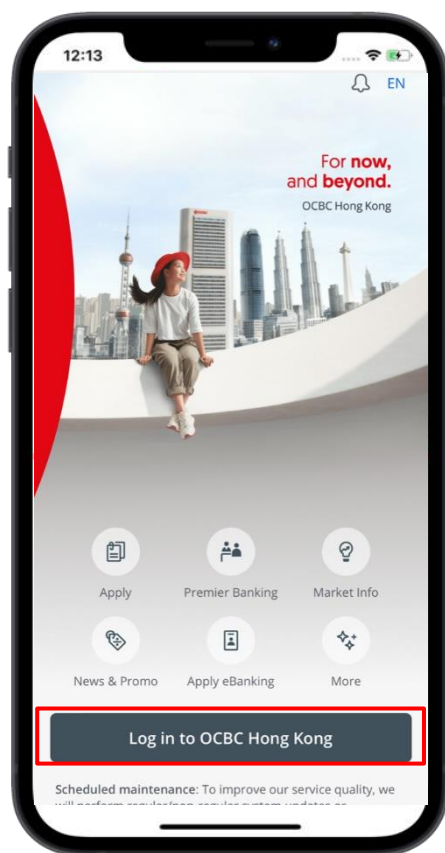
- ✓ Have a valid mobile number under the bank record
- ✓ Haven't Opened Investment Account, Currency-Linked Account and/or Structured Deposit Account before
- ✓ A non-U.S. citizen or other U.S. person

8 All-in-one Investment Account Opening

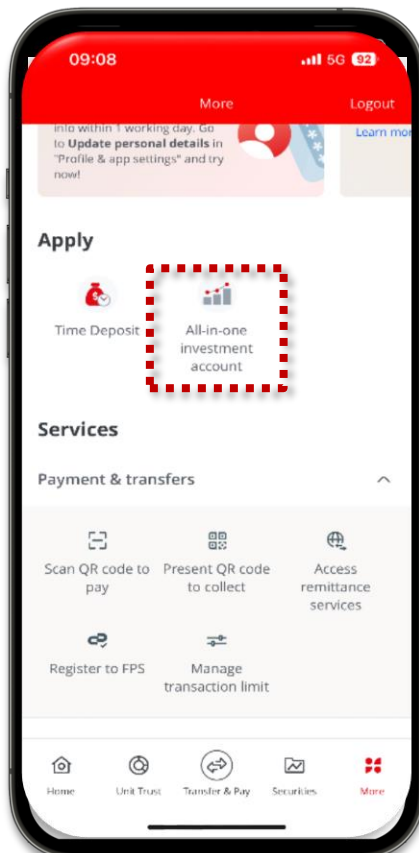


Start application

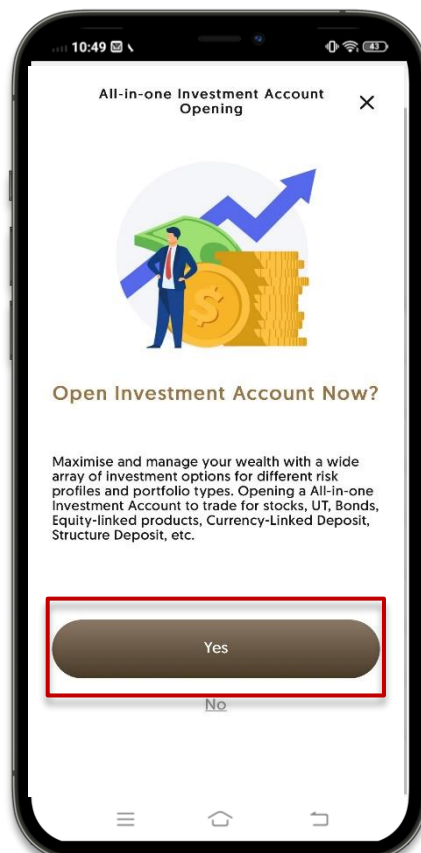
1 Login Mobile Banking



2 Click "All-in-one Investment Account" in Apply section



3 Tap "Yes" to start

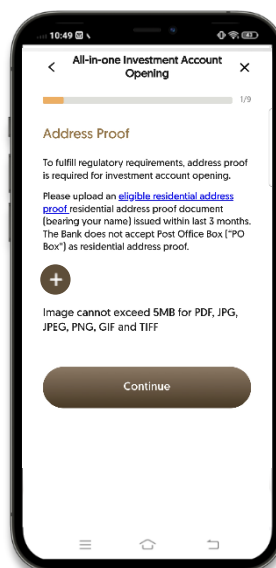
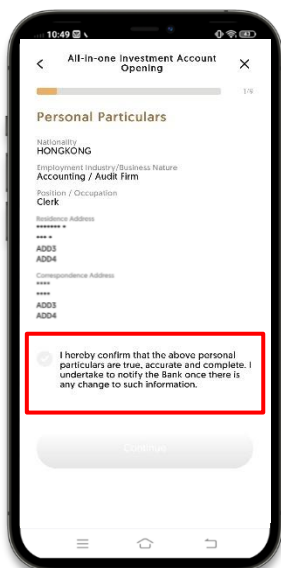


8 All-in-one Investment Account Opening



Confirm information & choose settlement account

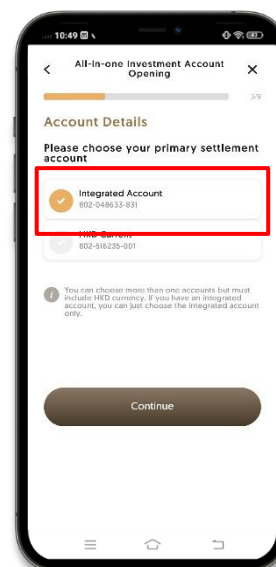
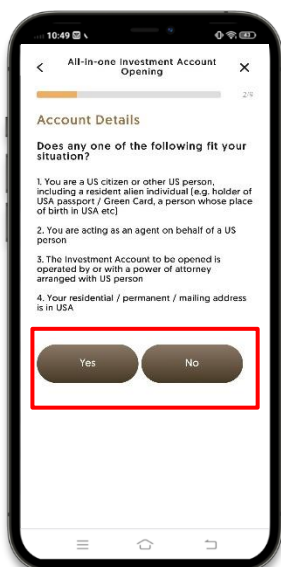
Review and confirm your personal particulars



Hint

You will be required to provide residential address proof for investment account opening if you do not have address proof record at our Bank.

Review and confirm your account details and choose a primary settlement account



Hint

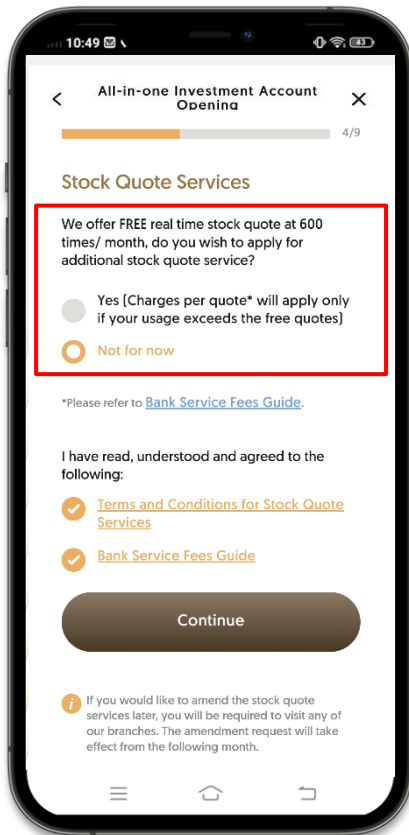
Choose Integrated Account as primary settlement account, the system will settle directly from the relevant foreign currency account when performing transactions in foreign currencies. You can save cost on exchange rates.

8 All-in-one Investment Account Opening



Choose service options

1 Choose Stock Quote Service options



All-in-one Investment Account Opening 4/9

Stock Quote Services

We offer FREE real time stock quote at 600 times/ month, do you wish to apply for additional stock quote service?

☒ Yes [Charges per quote* will apply only if your usage exceeds the free quotes]

☐ Not for now

*Please refer to [Bank Service Fees Guide](#).

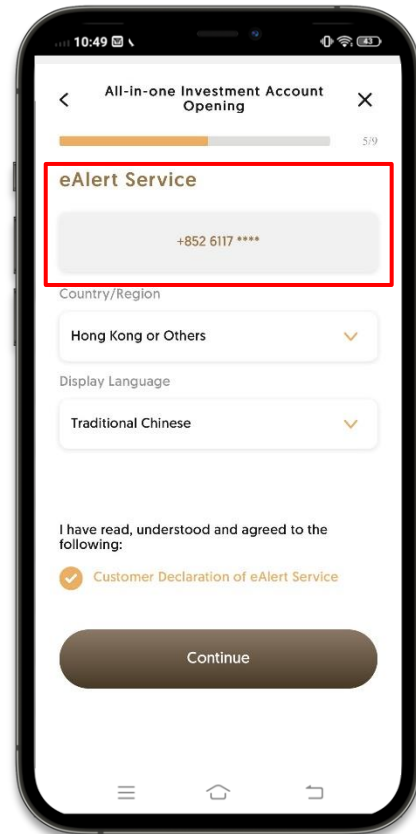
I have read, understood and agreed to the following:

- ☒ [Terms and Conditions for Stock Quote Services](#)
- ☒ [Bank Service Fees Guide](#)

Continue

i If you would like to amend the stock quote services later, you will be required to visit any of our branches. The amendment request will take effect from the following month.

2 Choose eAlert Service options



All-in-one Investment Account Opening 5/9

eAlert Service

+852 6117 ****

Country/Region

Hong Kong or Others

Display Language

Traditional Chinese

I have read, understood and agreed to the following:

- ☒ Customer Declaration of eAlert Service

Continue

Step 1

Step 2

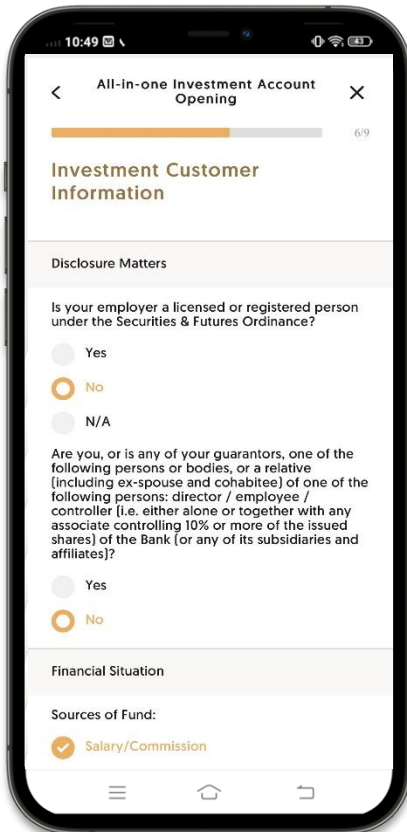
Step 3

Step 4

Step 5

Complete questionnaire

Complete a short questionnaire



10:49

All-in-one Investment Account Opening

6/9

Investment Customer Information

Disclosure Matters

Is your employer a licensed or registered person under the Securities & Futures Ordinance?

☐ Yes

☒ No

☐ N/A

Are you, or is any of your guarantors, one of the following persons or bodies, or a relative (including ex-spouse and cohabitee) of one of the following persons: director / employee / controller (i.e. either alone or together with any associate controlling 10% or more of the issued shares) of the Bank (or any of its subsidiaries and affiliates)?

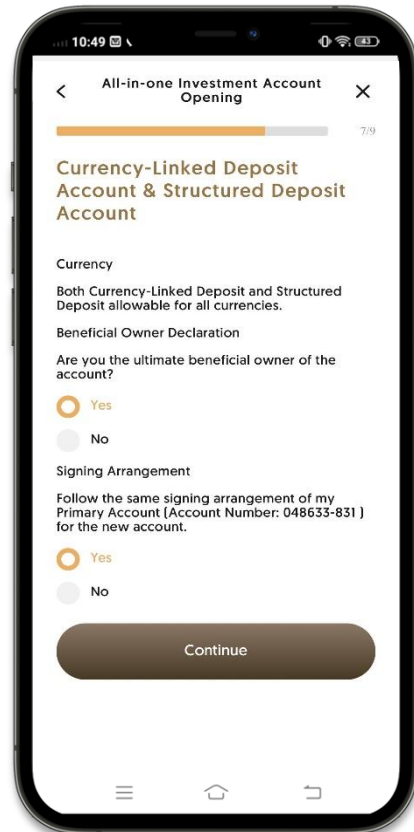
☐ Yes

☒ No

Financial Situation

Sources of Fund:

☒ Salary/Commission



10:49

All-in-one Investment Account Opening

7/9

Currency-Linked Deposit Account & Structured Deposit Account

Currency

Both Currency-Linked Deposit and Structured Deposit allowable for all currencies.

Beneficial Owner Declaration

Are you the ultimate beneficial owner of the account?

☒ Yes

☐ No

Signing Arrangement

Follow the same signing arrangement of my Primary Account (Account Number: 048633-831) for the new account.

☒ Yes

☐ No

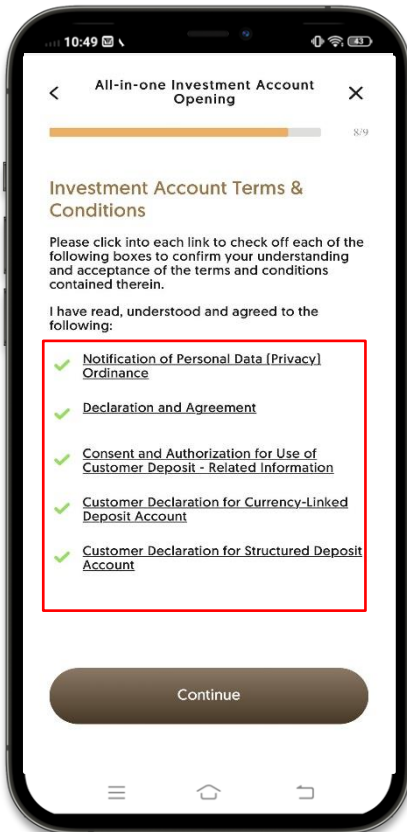
Continue

8 All-in-one Investment Account Opening



Confirm application

- 1 Read and agree Investment Account Terms & Conditions
- 2 Review and confirm your application
- 3 All-in-one investment account is opened



All-in-one Investment Account Opening

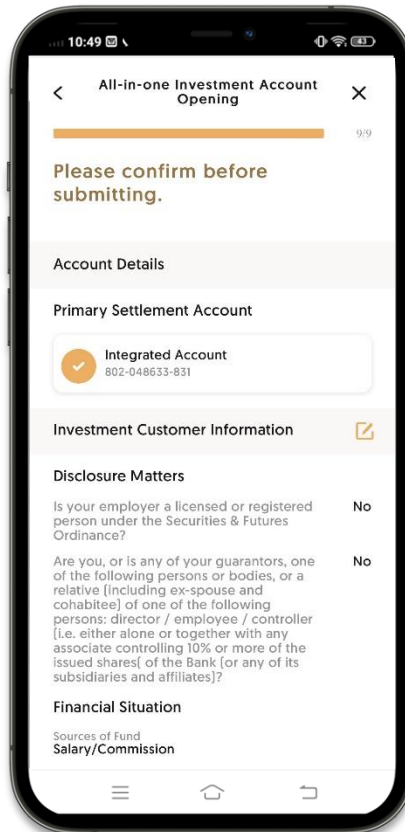
Investment Account Terms & Conditions

Please click into each link to check off each of the following boxes to confirm your understanding and acceptance of the terms and conditions contained therein.

I have read, understood and agreed to the following:

- ☒ Notification of Personal Data (Privacy) Ordinance
- ☒ Declaration and Agreement
- ☒ Consent and Authorization for Use of Customer Deposit - Related Information
- ☒ Customer Declaration for Currency-Linked Deposit Account
- ☒ Customer Declaration for Structured Deposit Account

Continue



All-in-one Investment Account Opening

Please confirm before submitting.

Account Details

Primary Settlement Account

Integrated Account
802-048633-831

Investment Customer Information

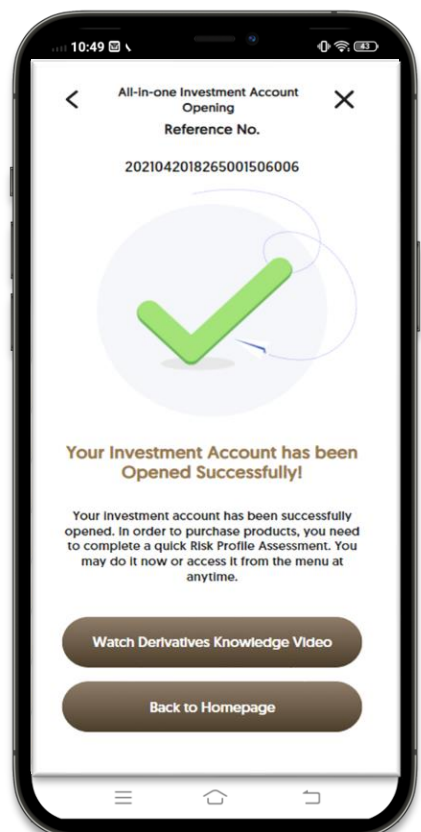
Disclosure Matters

Is your employer a licensed or registered person under the Securities & Futures Ordinance? No

Are you, or is any of your guarantors, one of the following persons or bodies, or a relative (including ex-spouse and cohabitee) of one of the following persons: director / employee / controller (i.e. either alone or together with any associate controlling 10% or more of the issued shares of the Bank (or any of its subsidiaries and affiliates)? No

Financial Situation

Sources of Fund
Salary/Commission



All-in-one Investment Account Opening

Reference No.

2021042018265001506006

Your Investment Account has been Opened Successfully!

Your investment account has been successfully opened. In order to purchase products, you need to complete a quick Risk Profile Assessment. You may do it now or access it from the menu at anytime.

Watch Derivatives Knowledge Video

Back to Homepage

Experience speedy All-in-One Investment Account Opening now

9 ePIN Reset

Reset your User ID/PIN remote and instantly in 3 methods

Method 1) ATM Card + ATM PIN Or;

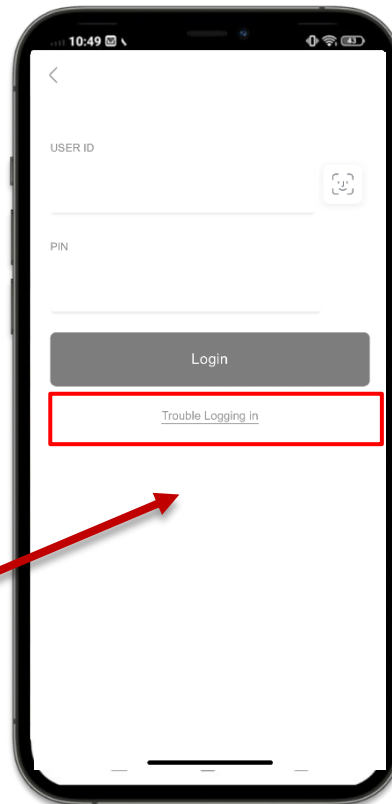
Method 2) Credit Card + Credit Card ATM PIN Or;

Method 3) Personal Information (For Wealth Management Connect Southbound Customer Only)

1 Click "Login"



2 Click "Trouble Logging in"

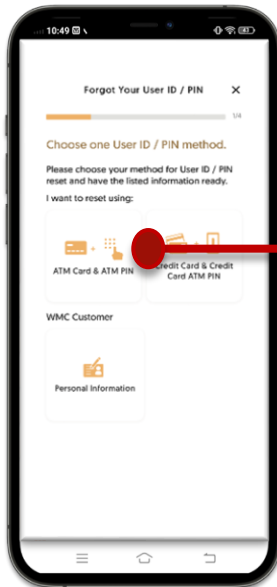


9 ePIN Reset

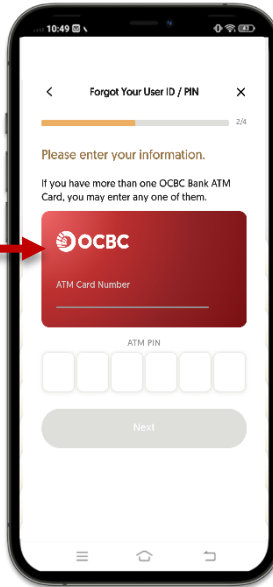


1) ATM Card + ATM PIN

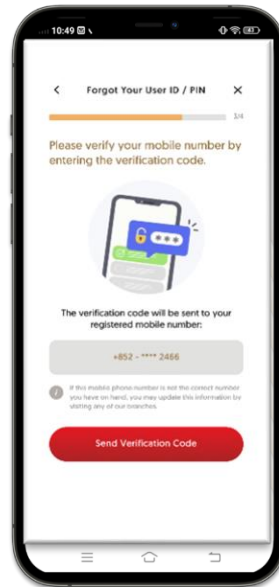
3 Select "ATM Card & ATM PIN"



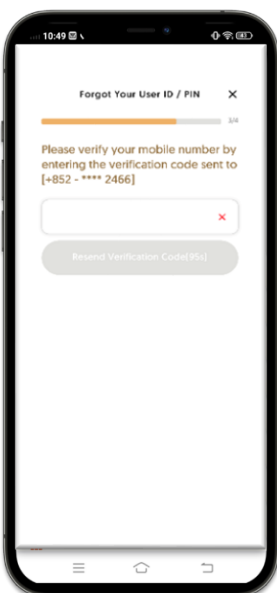
4 Input ATM card No. & ATM PIN



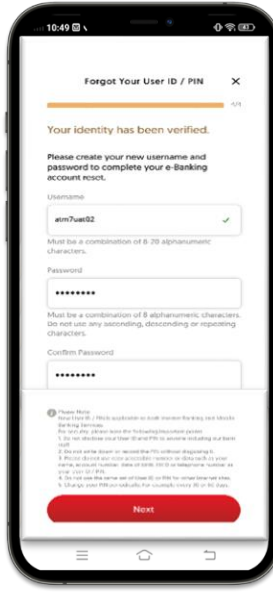
5 SMS OTP will be sent to the mobile number displayed.



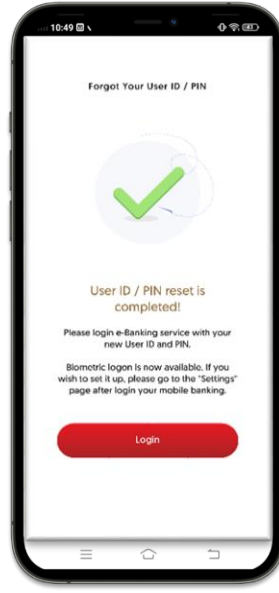
6 Input SMS OTP



7 Input New Username and Password



8 Reset Complete. You may login personal e-Banking right away.

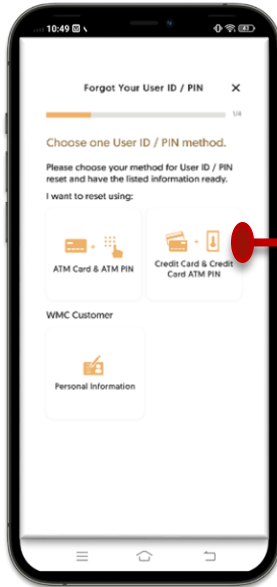


9 ePIN Reset

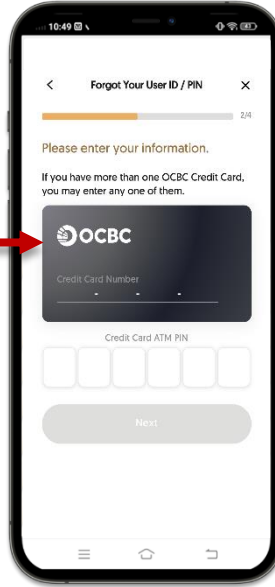


2) Credit Card + Credit Card ATM PIN

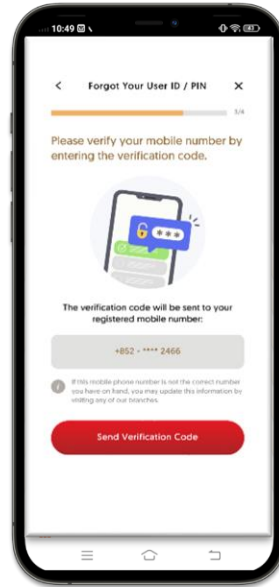
3 Select "Credit Card & Credit Card ATM PIN"



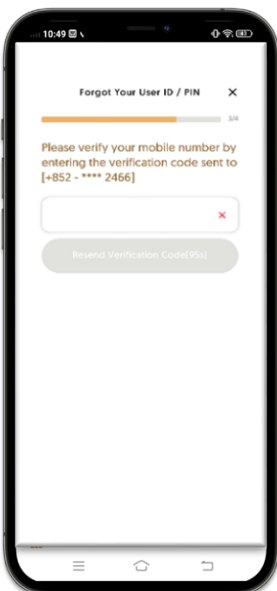
4 Input Credit card No. & Credit Card ATM PIN



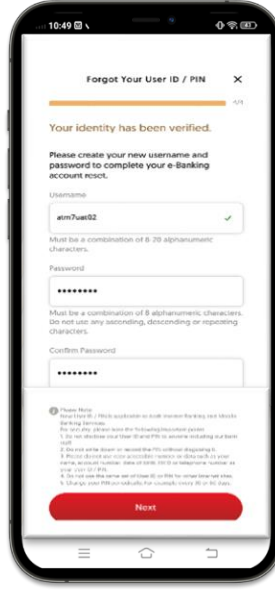
5 SMS OTP will be sent to the mobile number displayed.



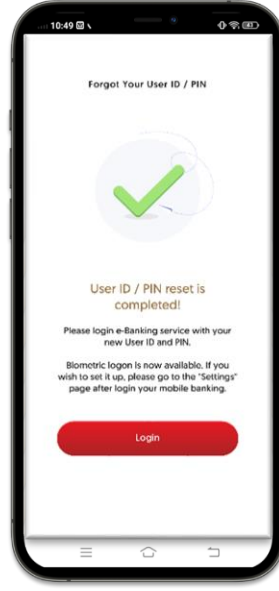
6 Input SMS OTP



7 Input New Username and Password



8 Reset Complete. You may login personal e-Banking right away.

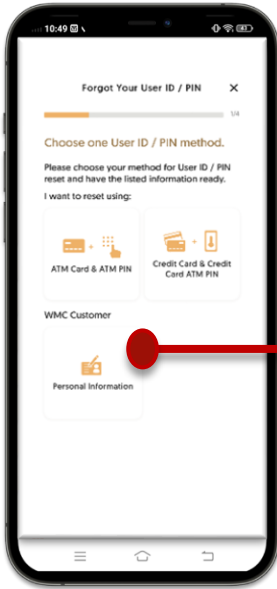


9 ePIN Reset

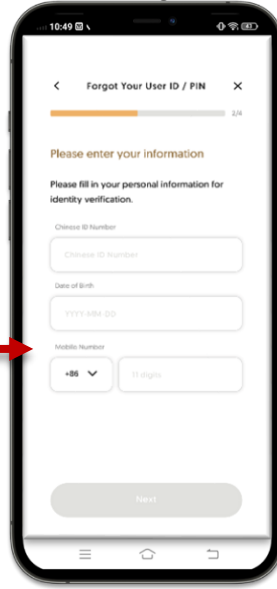


3) Personal Information (For Wealth Management Connect Southbound Customer Only)

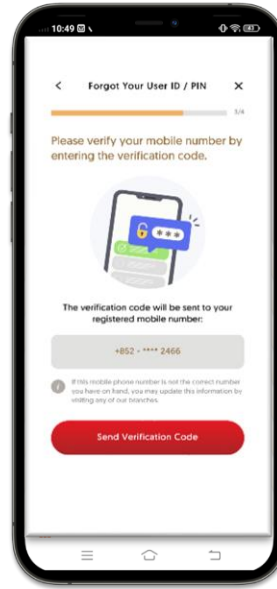
3 Select "Personal Information"



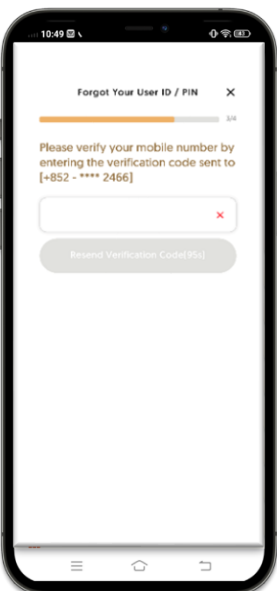
4 Input China ID No., Date of Birth and Mobile Number registered



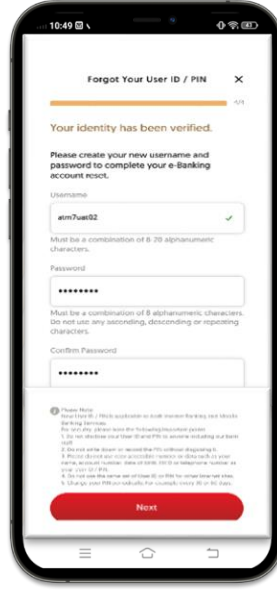
5 SMS OTP will be sent to the mobile number displayed.



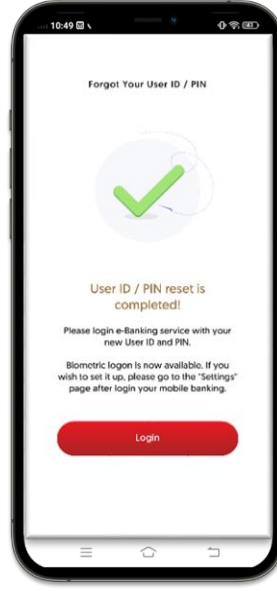
6 Input SMS OTP



7 Input New Username and Password



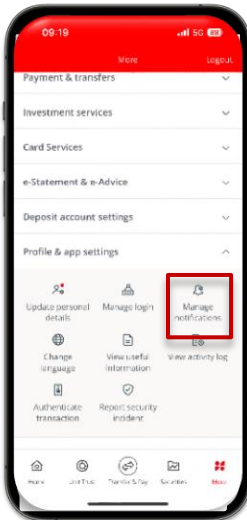
8 Reset Complete. You may login personal e-Banking right away.



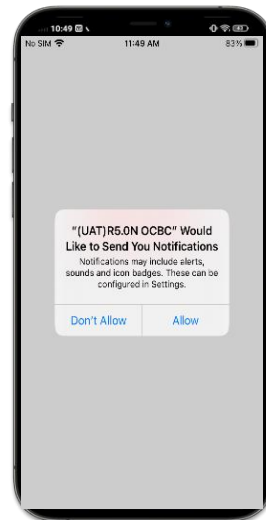
10 Push Notification

Push Notification Registration

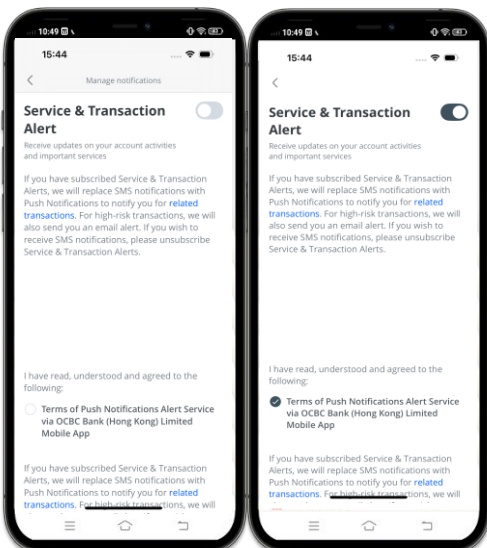
1 Click "Manage Notifications" on More menu



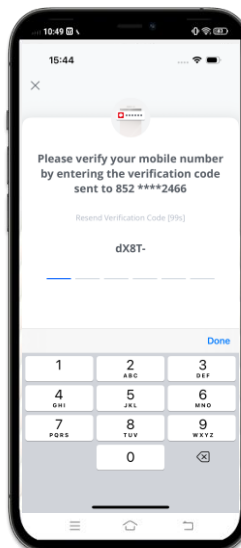
2 Accept the Push Notification requested by device settings



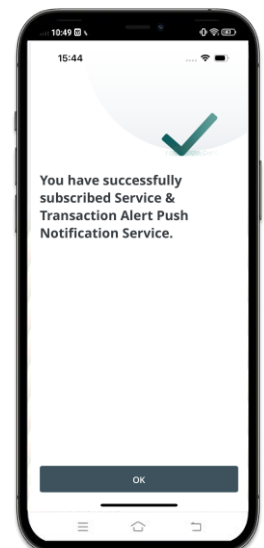
3 Turn On the Alert and Accept the Terms of Push Notification Service



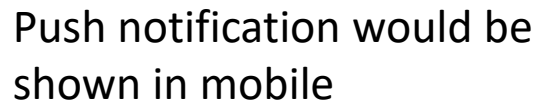
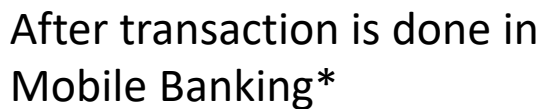
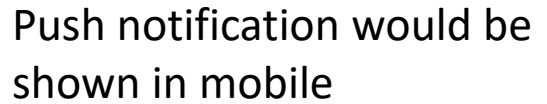
4 Input SMS OTP



5 Registration Complete



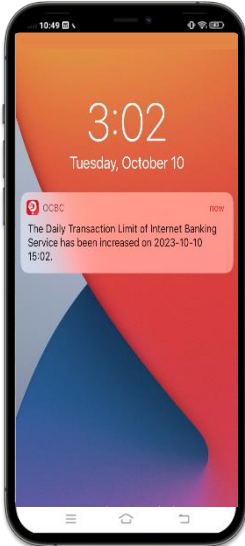
After transaction is done in Internet Banking*



10 Push Notification

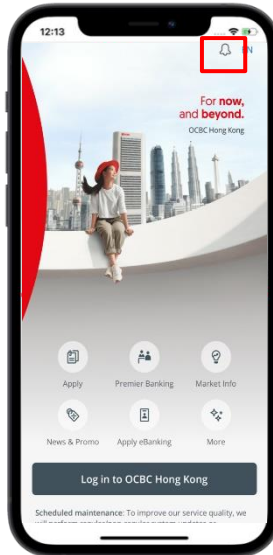
Push Notification Inbox

1a Click on the push notification and Login



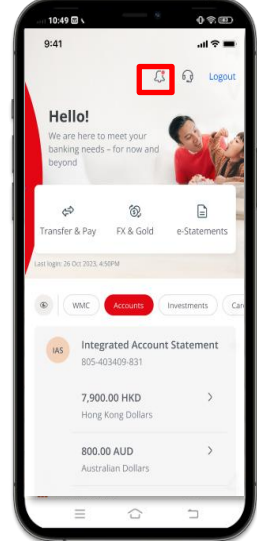
OR

1b Click the bell icon on Pre-Login page and Login

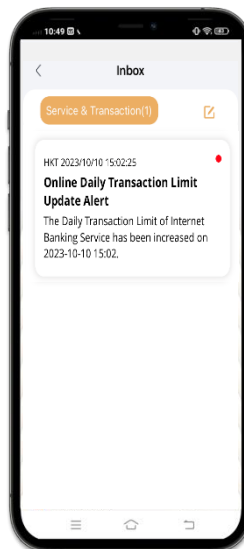


OR

1c Click the mail icon on My Portfolio page



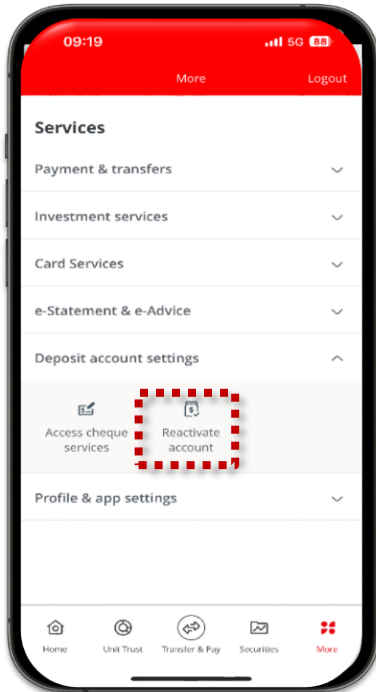
2 Land on Push Notification Inbox



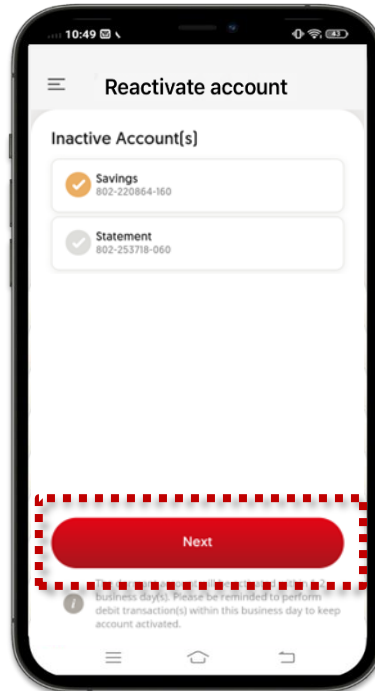
11 Reactivate account

Activate dormant account

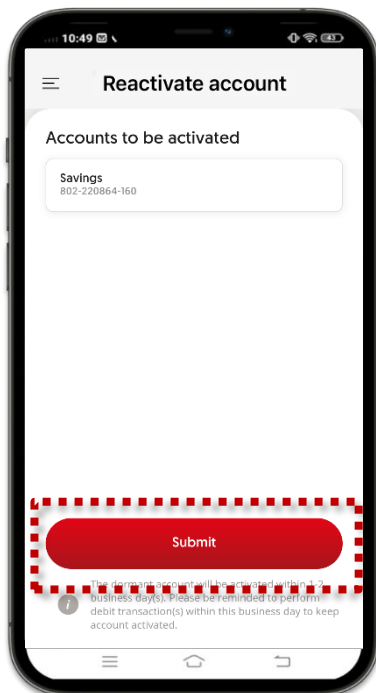
1 Select "Reactivate account" on More menu



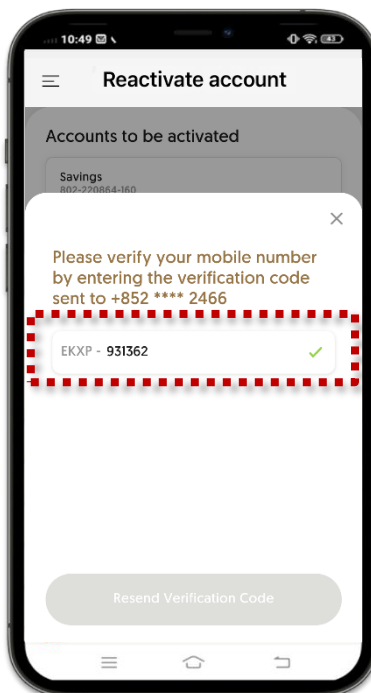
2 Select account and Tap "Next"



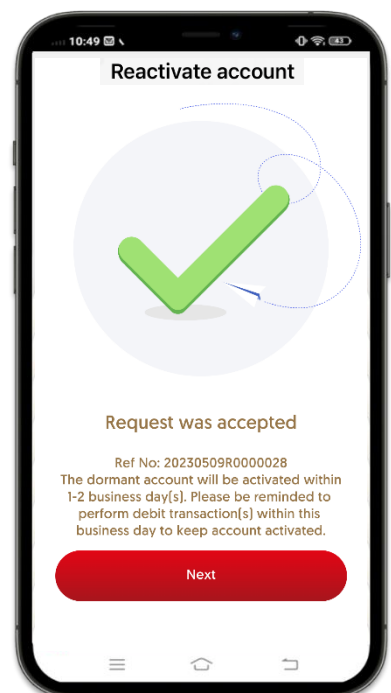
3 Tap "Submit" to confirm selection



4 Input SMS OTP



5 Request Acknowledgement

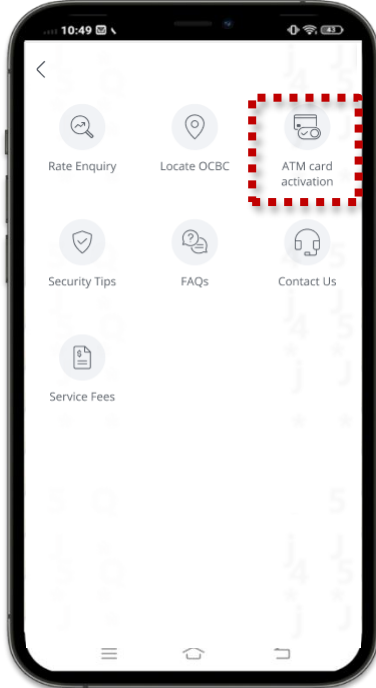


7 To activate account successfully, be sure to perform a debit transaction (e.g. fund transfer, bill payment) with the selected account(s) shortly after request submission / before 20:00 on the same business day.

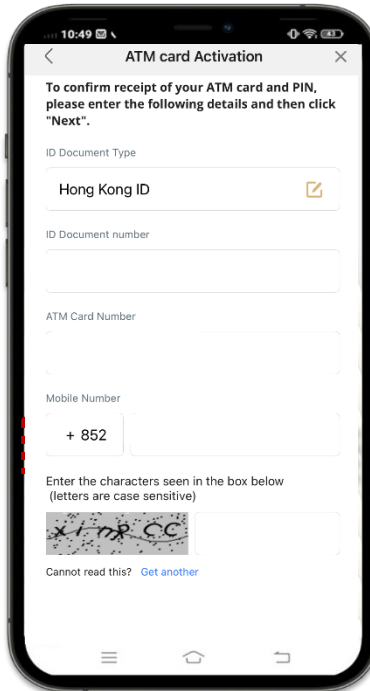
12 ATM Card Activation

Activate ATM Card

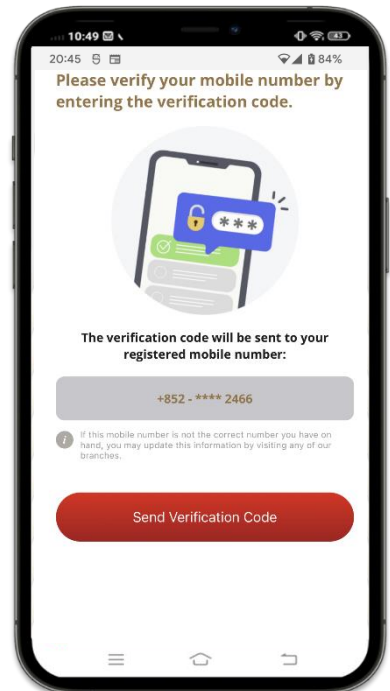
1 Click "More" icon in prelogin page and select "ATM card activation" without logging in



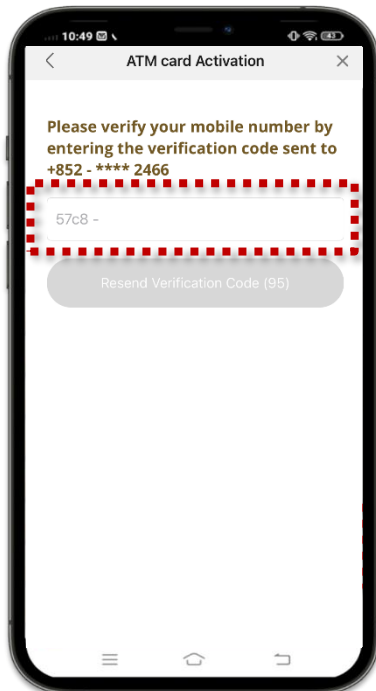
2 Follow the on-screen instructions



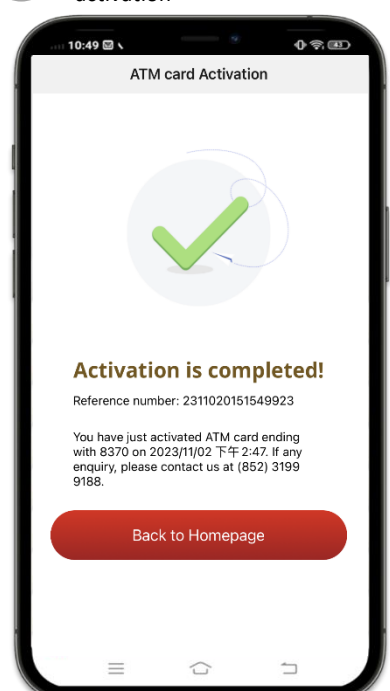
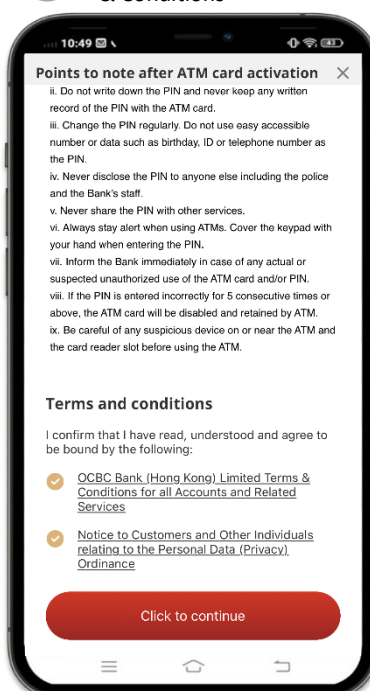
3 Receive and input SMS One Time Password



4 Read and agree Terms & Conditions



5 "Click to continue" to confirm activation



6

Please note: Please change your PIN immediately to any 6-digit number at any JETCO ATM and destroy any documents containing PIN information once activated

13 Discontinue Paper Statement & Advice

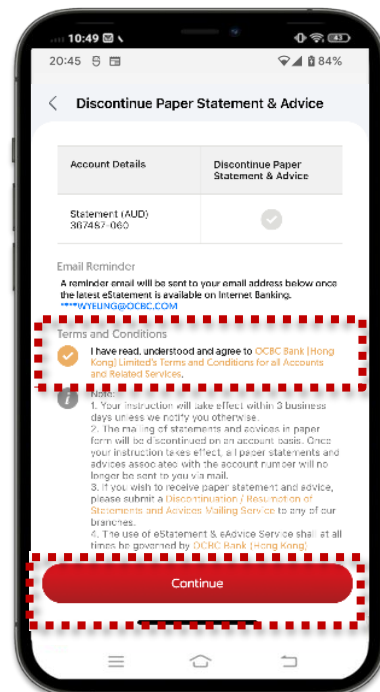
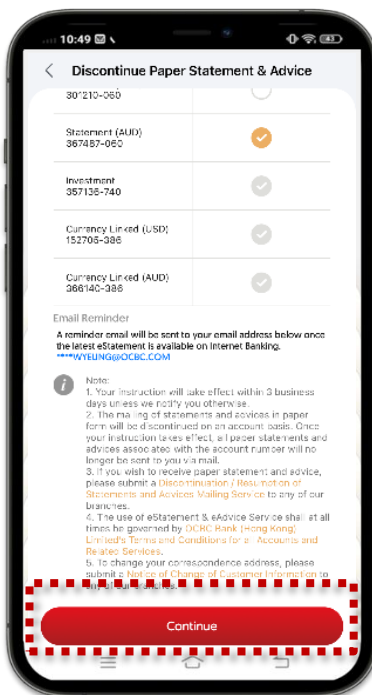
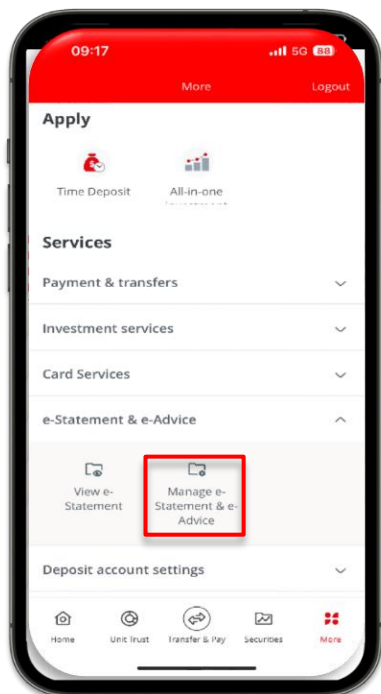


Discontinue Paper Statement & Advice

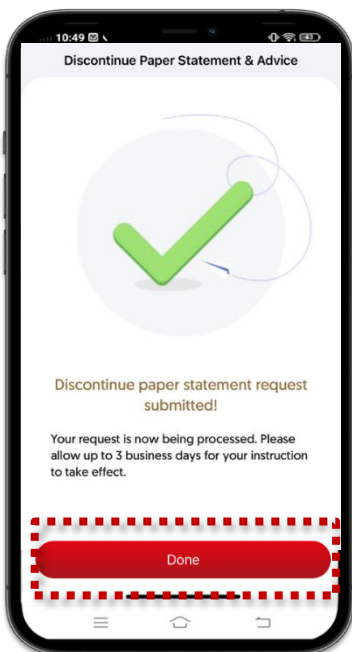
1 Login OCBC Hong Kong mobile app and click "Manage e-Statement & e-Advice" on More page

2 If you have already discontinued paper statement for a particular account, the corresponding button will be in grey and cannot be selected. You can discontinue other account's paper statement and click the "Continue" red button to proceed next.

3 Read and tick the "Terms and Conditions" to accept the related terms and conditions. Then click the "Continue" red button to proceed next.

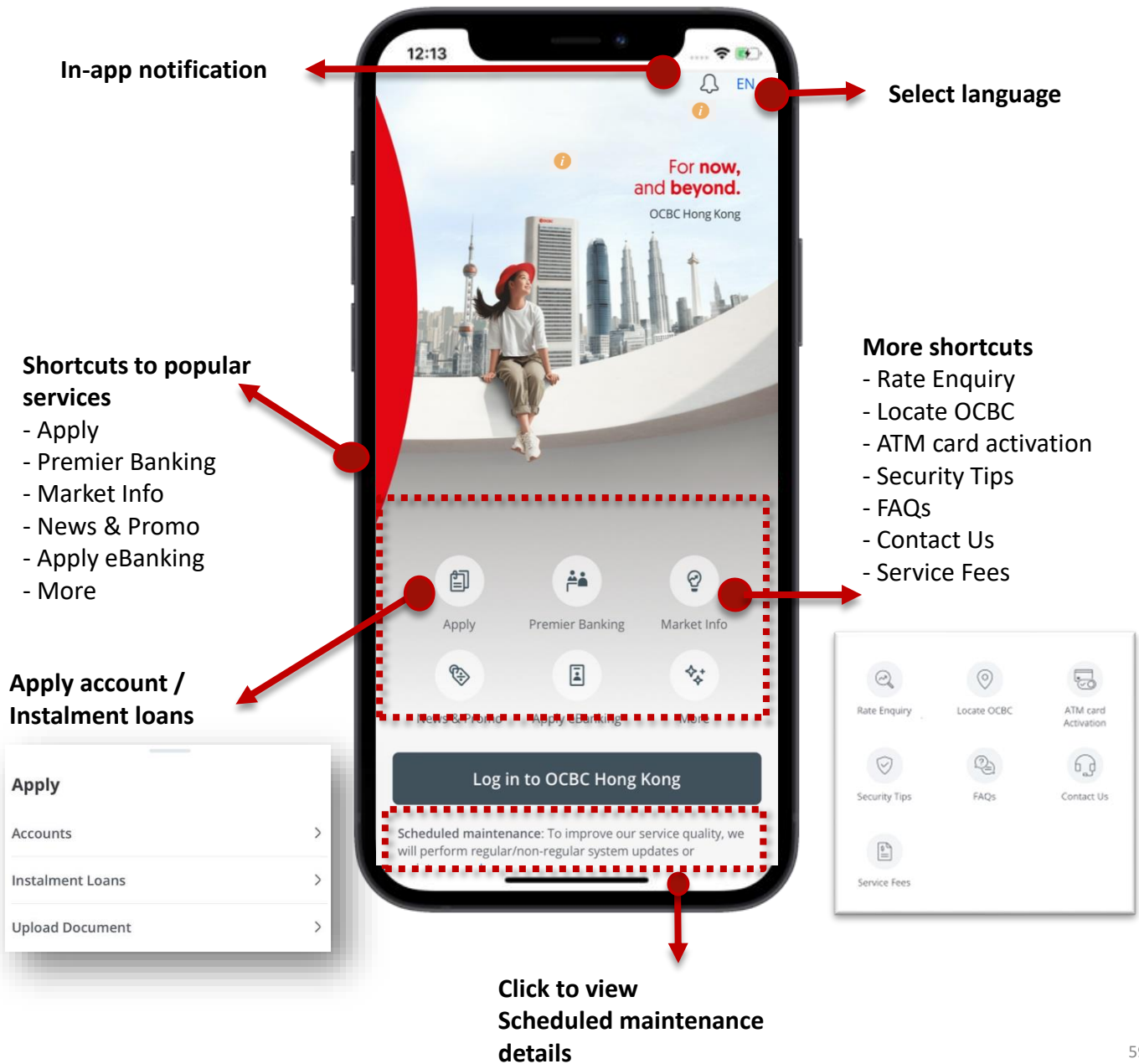


4 Completed . You can click the "Done" red button to go back to the landing page.



14 Brand New Pre-login Page Design

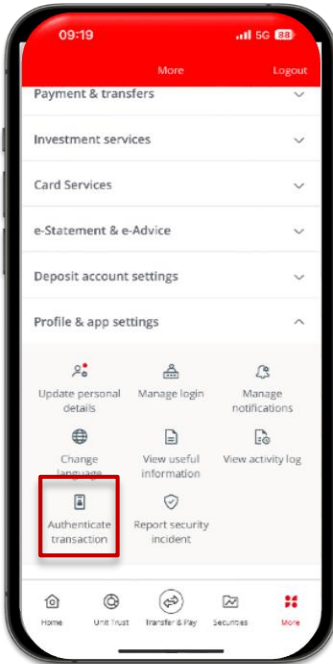
A brand new pre-login page design
Enhanced mobile banking experience



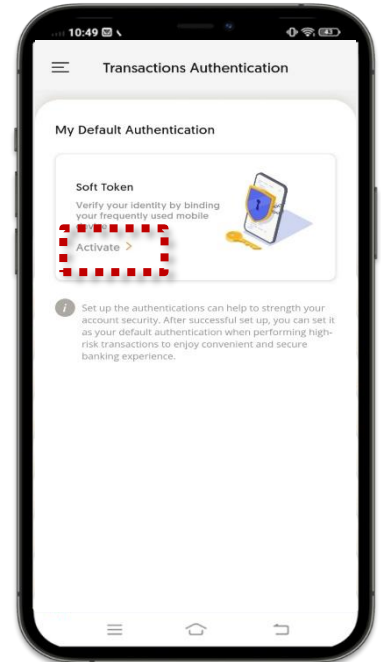
15 Soft Token

1) Soft Token Registration

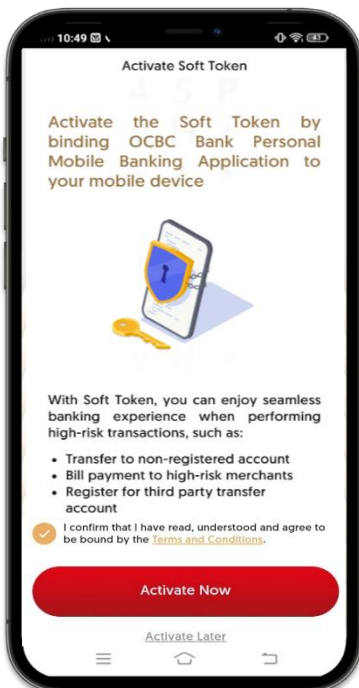
1 Select "Authenticate transaction" on More page



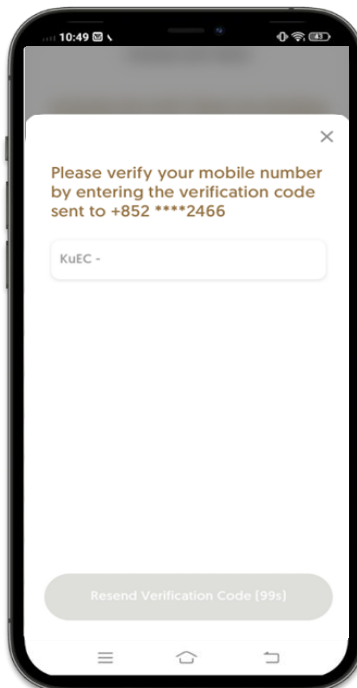
2 Select "Activate" button



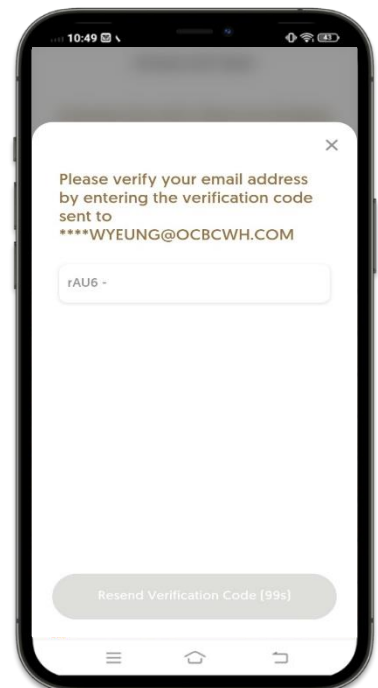
3 Confirm the "T&C" and select "Activate Now" button



4 Input SMS OTP



5 Input Email OTP



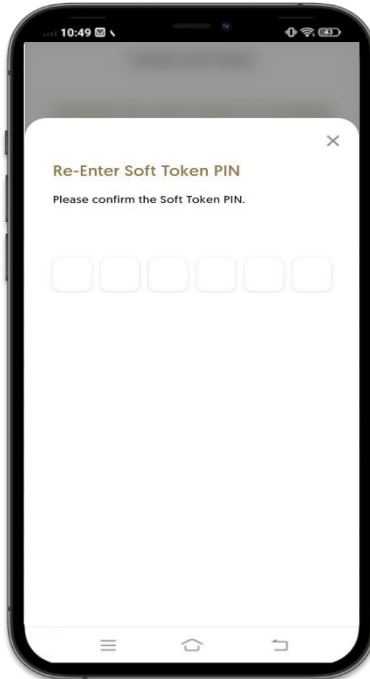
15 Soft Token

1) Soft Token Registration (CONT'D)

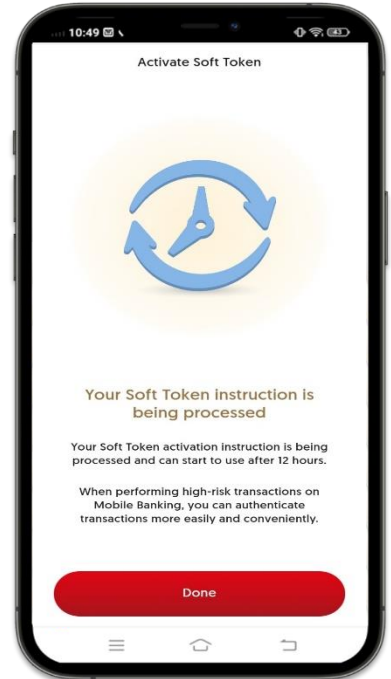
7 Setup soft token PIN



8 Re-confirm the soft token PIN



9 Your instruction is submitted

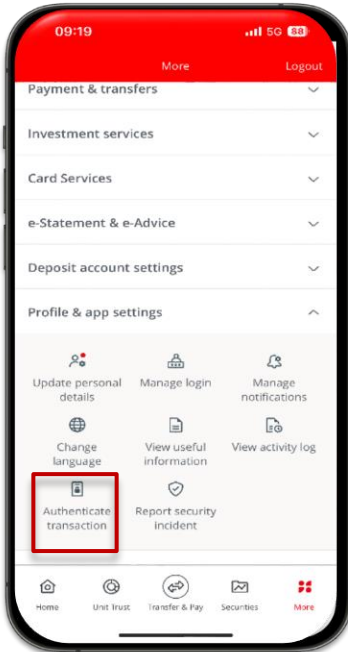


*Soft token will be effective after 12 hours

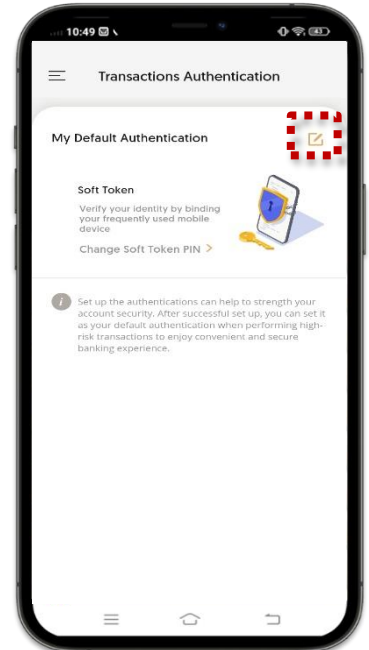
15 Soft Token

2) Soft Token De-registration

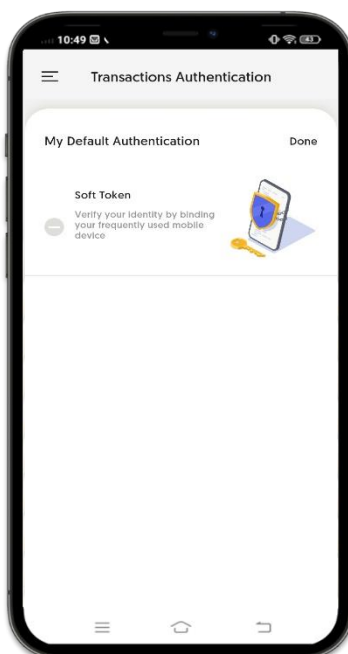
1 Select "Authenticate transaction" on More page



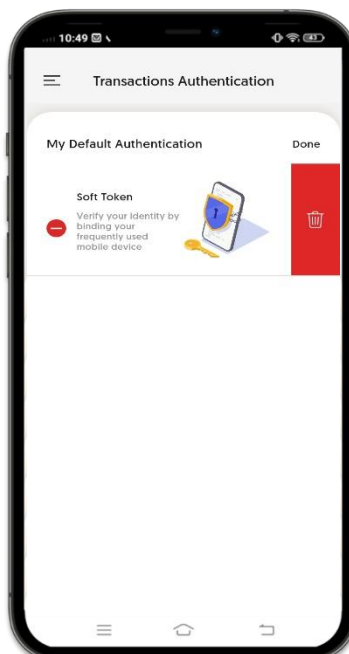
3 Select "Edit" icon



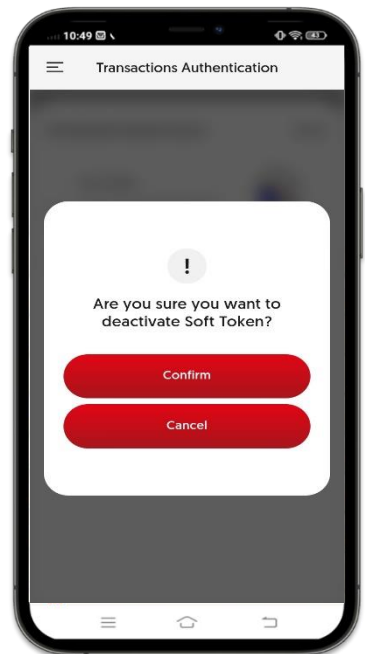
4 Select "-" icon



5 Select "Rubbish bin" icon



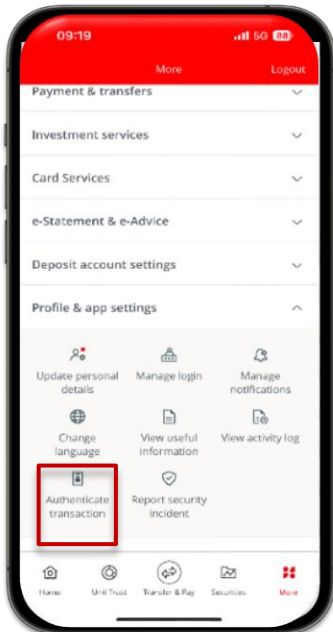
6 Select "Confirm" button to de-register soft token



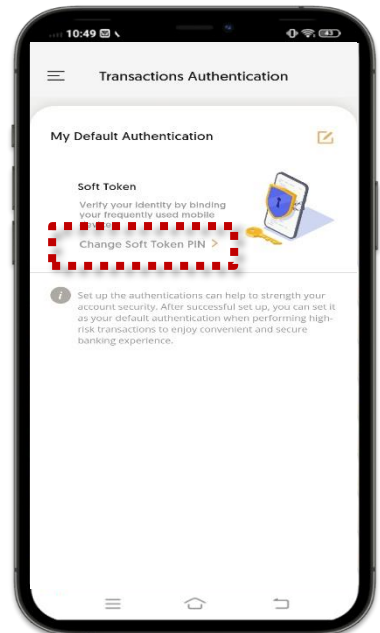
15 Soft Token

3) Soft Token PIN Update

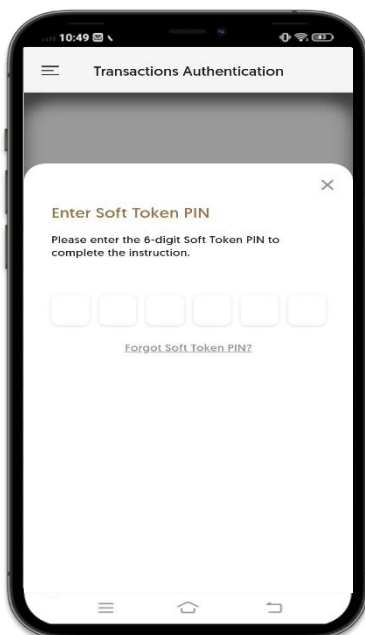
1 Select "Authenticate transaction"



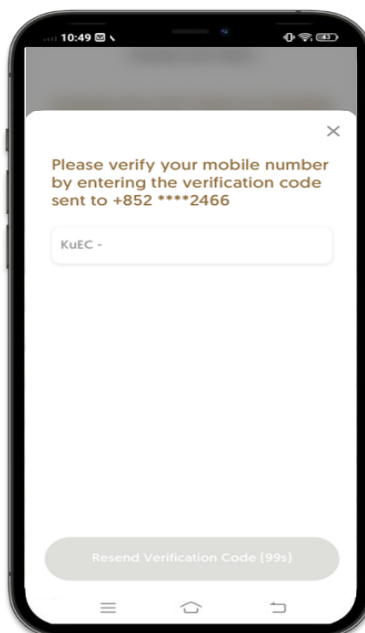
3 Select "Change Soft Token PIN"



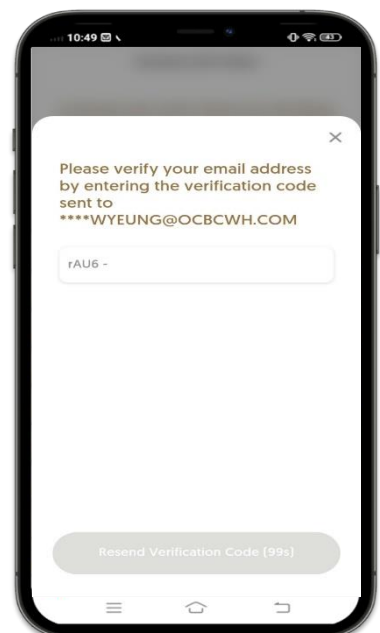
4 Enter the Soft token PIN



5 Input SMS OTP



6 Input Email OTP



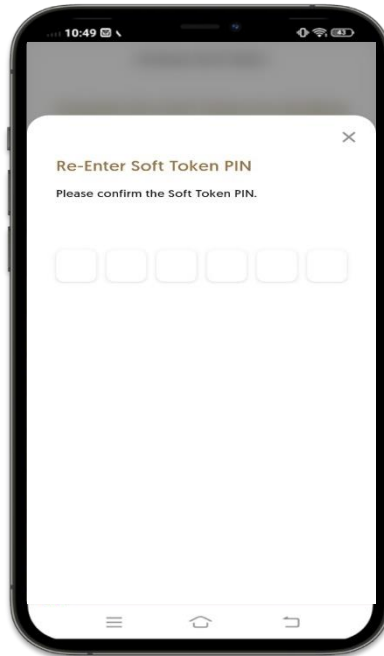
15 Soft Token

3) Soft Token PIN Update (CONT')

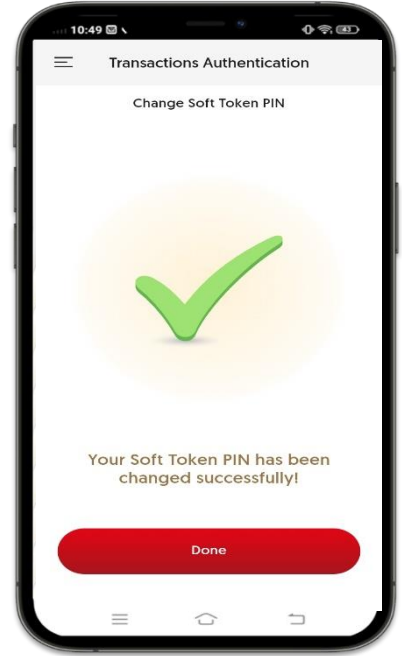
7 Setup soft token PIN



8 Re-confirm the soft token PIN



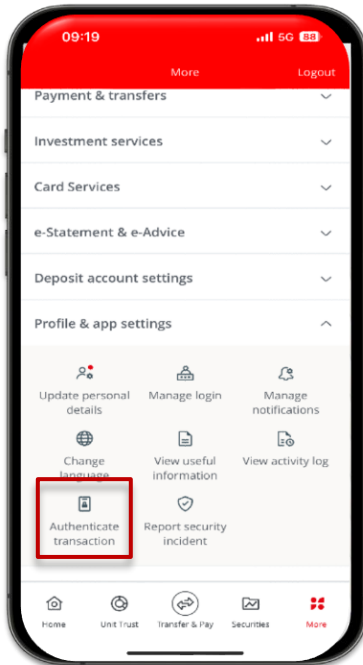
9 Your instruction is submitted



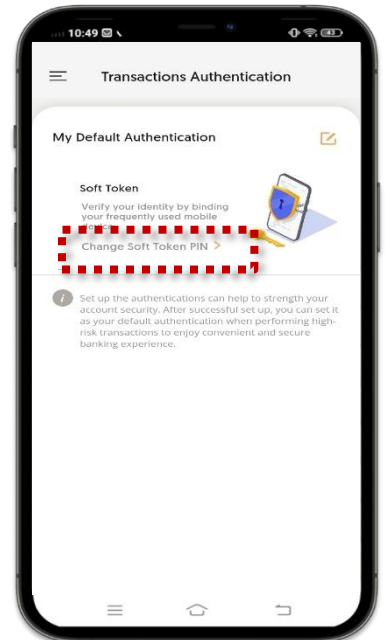
15 Soft Token

4) Soft Token Forgot PIN

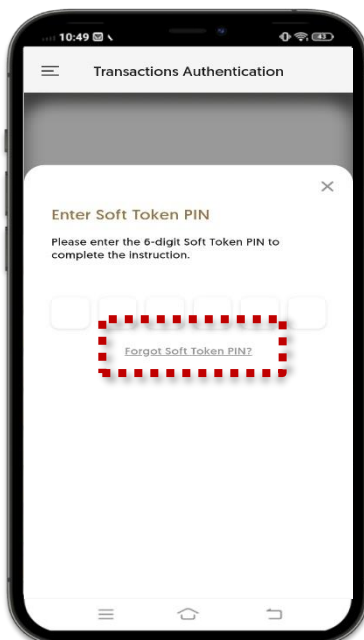
- 1 Select "Authenticate transaction" on More page



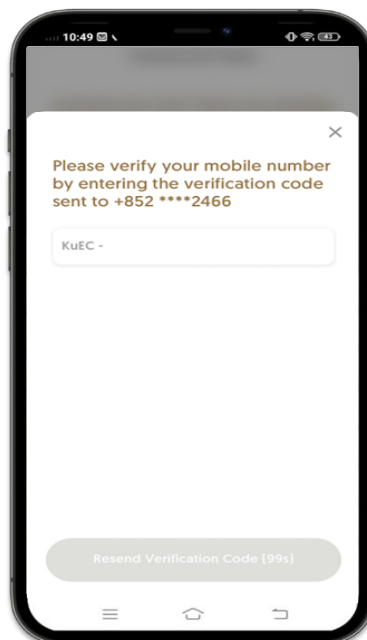
- 3 Select "Change Soft Token PIN" button



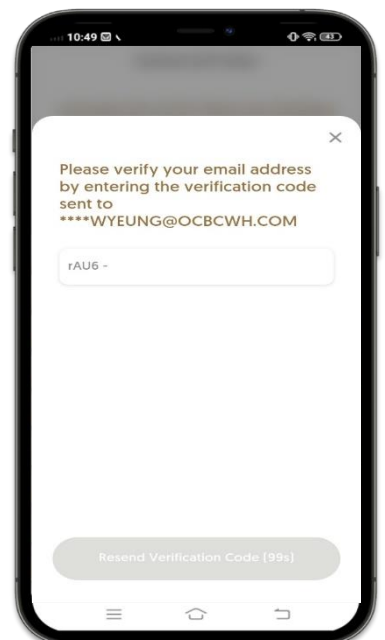
- 4 Select "Forgot Soft token PIN?" button



- 5 Input SMS OTP



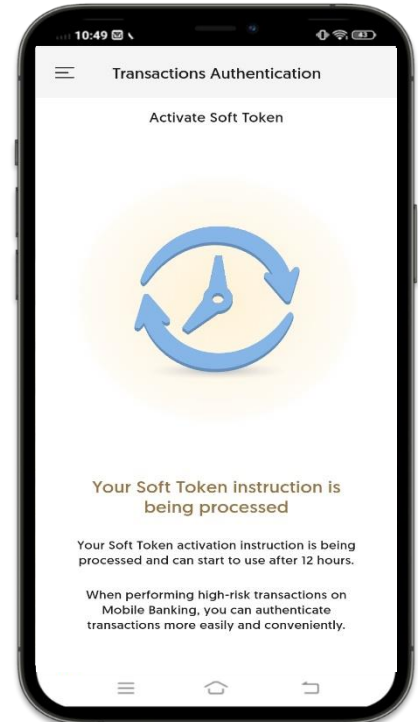
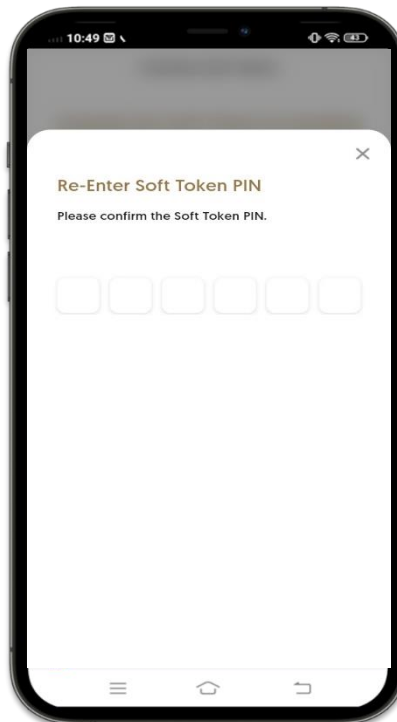
- 6 Input Email OTP



15 Soft Token

4) Soft Token Forgot PIN (CONT')

- 7 Enter customized soft token PIN
- 8 Re-confirm the soft token PIN
- 9 Your instruction is submitted

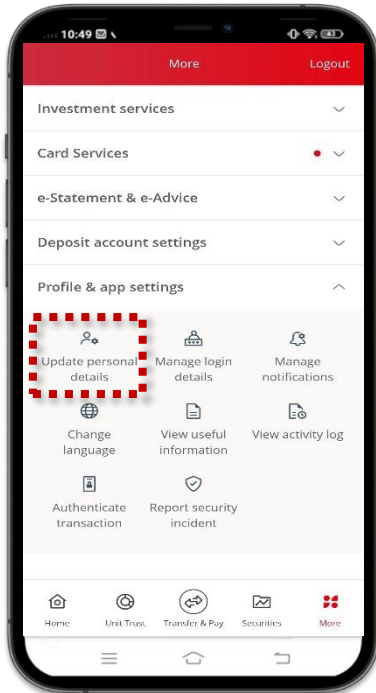


*Soft token will be effective after 12 hours

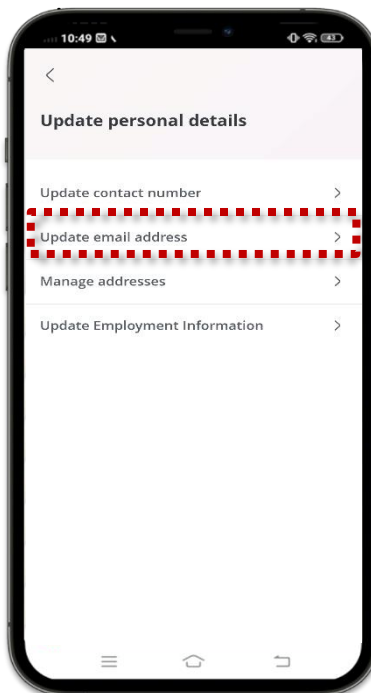
16 Update email address



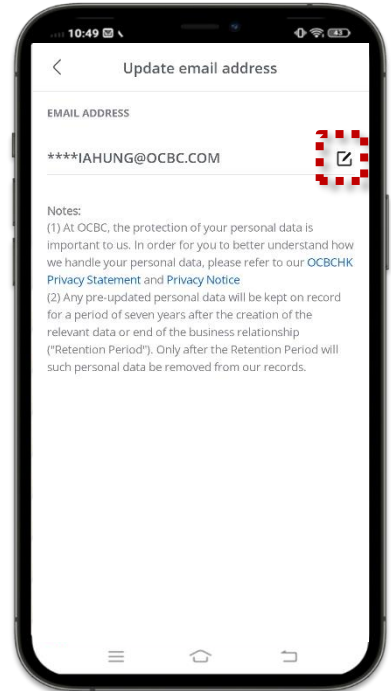
- 1 Select "Update personal details" under "Profile & app setting" in "More"



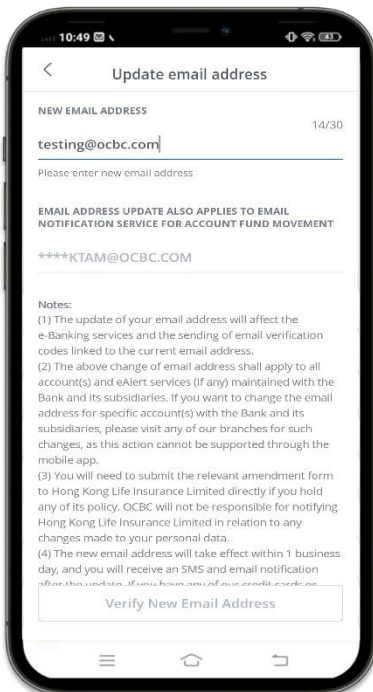
- 2 Select "Update email address"



- 3 Click "Edit" button



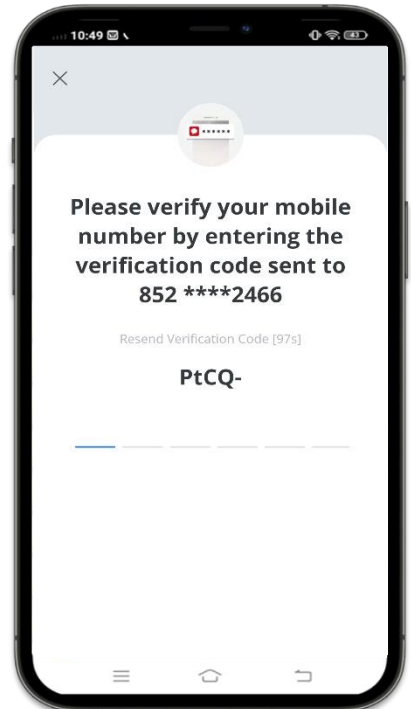
- 4 Input the new email address



- 5 Input Email OTP (New Email address)

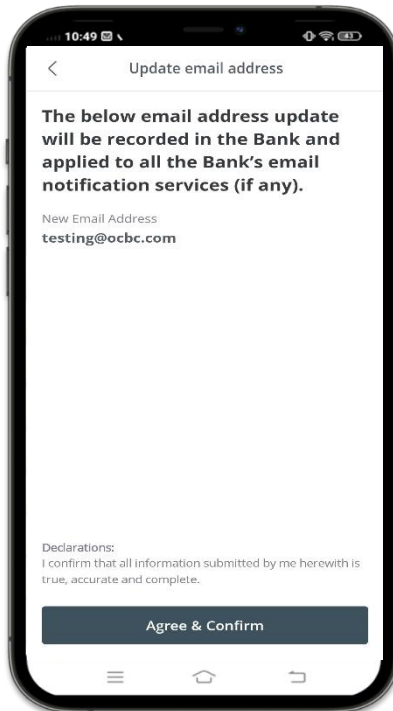


- 6 Input SMS OTP

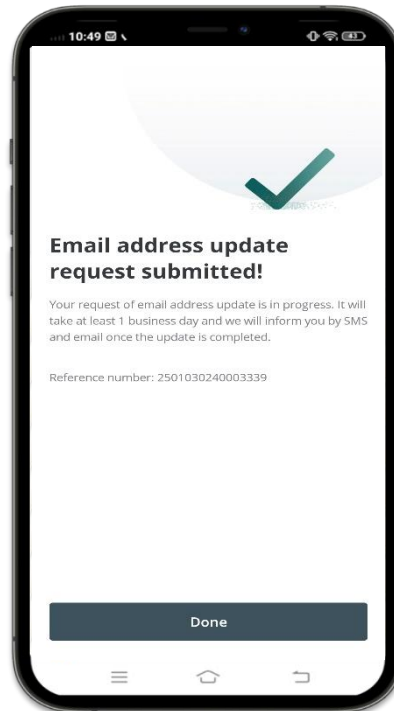


16 Update email address

7 Review the details and submit the instruction



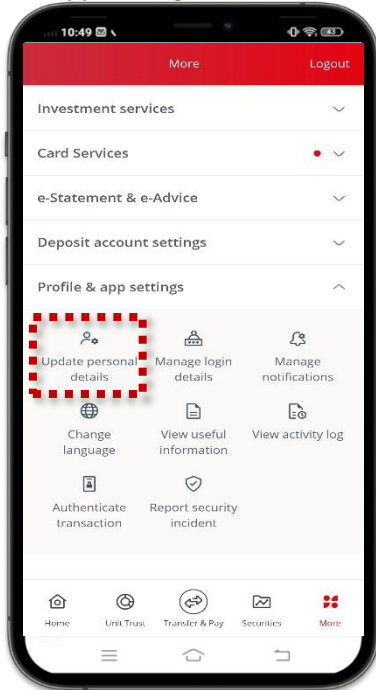
8 Your instruction is submitted



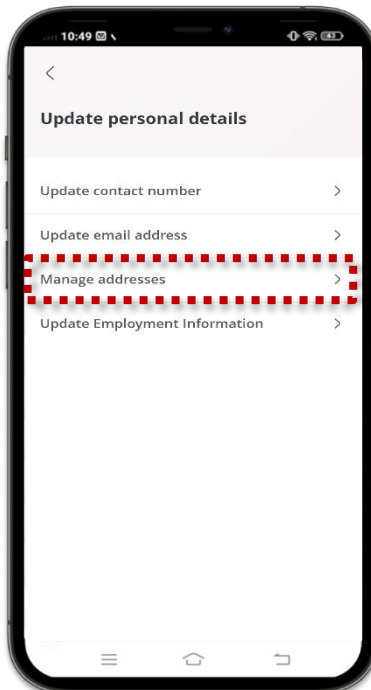
- The above change of email address shall apply to all account(s) and eAlert services (if any) maintained with the Bank and its subsidiaries. If you want to change the email address for specific account(s) with the Bank and its subsidiaries, please visit any of our branches for such changes, as this action cannot be supported through the mobile app.
- The new email address will take effect within 1 business day. If you have any of our credit cards or accounts with our subsidiaries, those information will be updated within 5 business days.
- If your email address has registered for "FPS" addressing service, the service will be cancelled after the information update takes effect.

17 Manage addresses

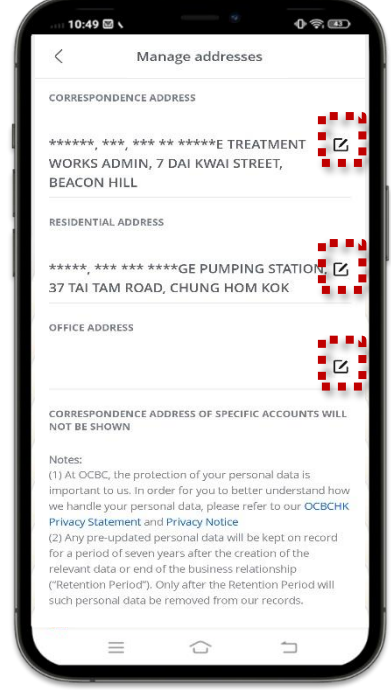
- 1 Select "Update personal details" under "Profile & app setting" in "More"



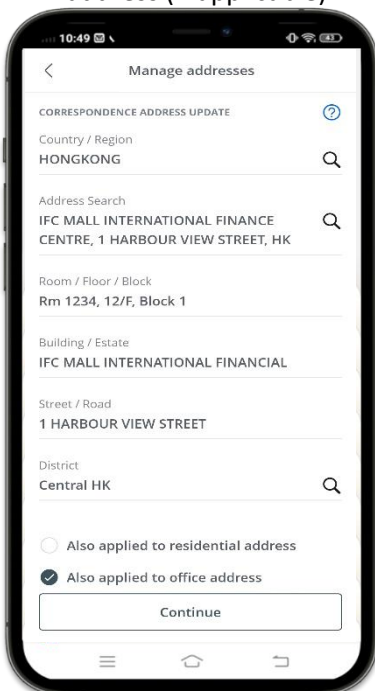
- 2 Select "Manage addresses" button



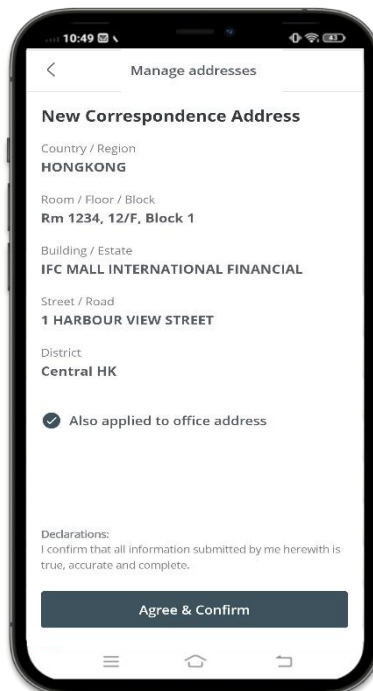
- 3 Click "Edit" button



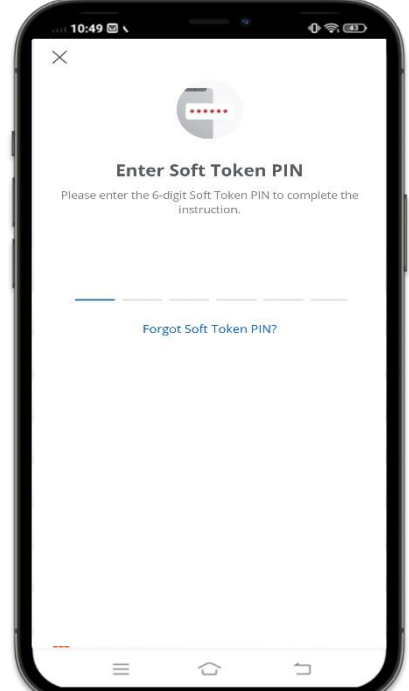
- 4 Input the new address and select also applied to other address (if applicable)



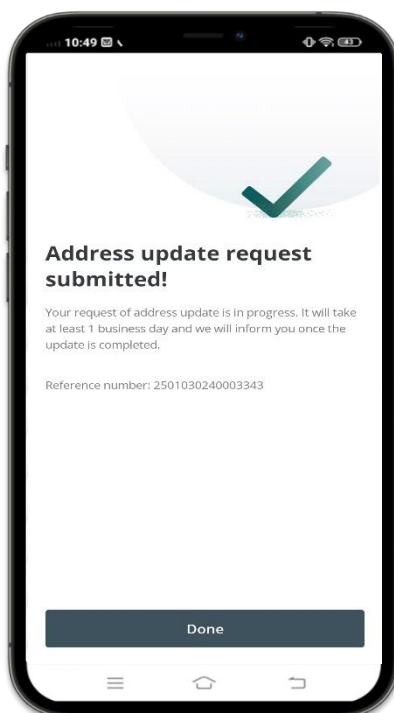
- 5 Review the details and submit the instruction



- 6 Input Soft Token PIN



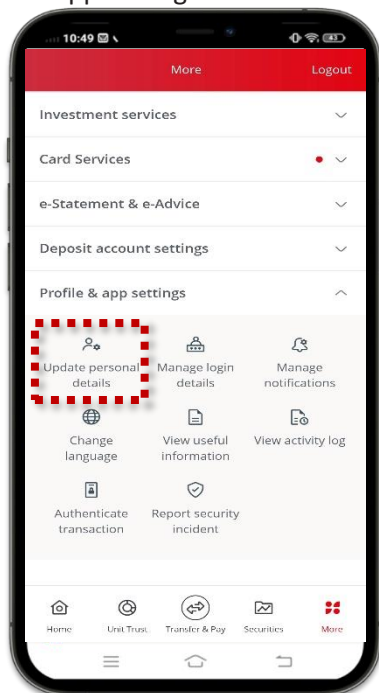
7 Your instruction is submitted



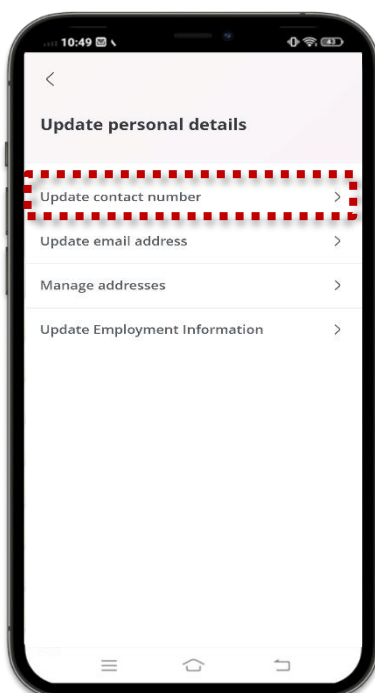
- The above change of address shall apply to all account(s) maintained with the Bank and its subsidiaries in Hong Kong. However, if you want to change the address for specific account(s) with the Bank and its subsidiaries, please visit any of our branches for such changes, as this action cannot be supported through the mobile app.
- The new address will take effect within 1 business day. If you have any of our credit cards or accounts with our subsidiaries, it will take 5 business days for those account information to be updated.
- For customer with the Bank's investment account, please bring along the address proof and visit any of our branches for residential address update.

18 Update contact number

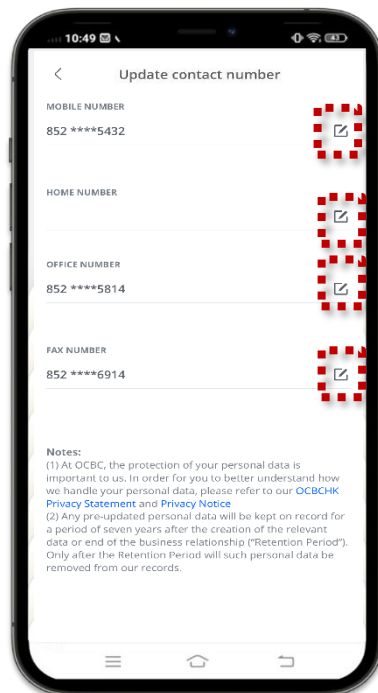
- 1 Select "Update personal details" under "Profile & app setting" in "More"



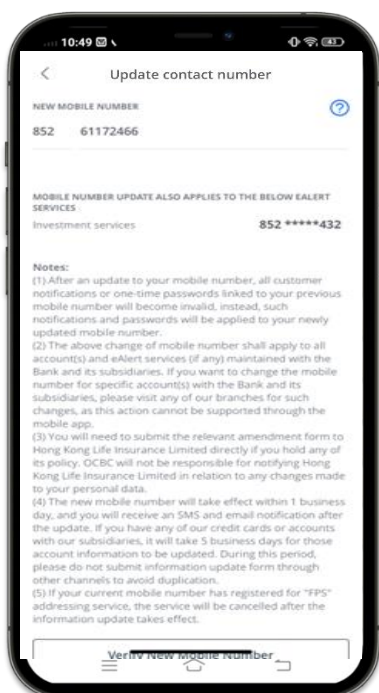
- 2 Select "Update contact number" button



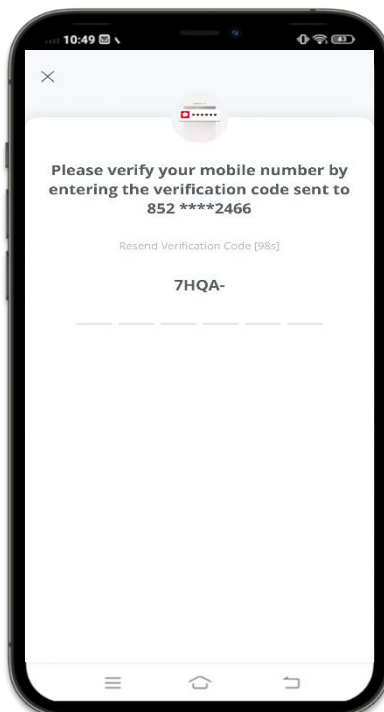
- 3 Click "Edit" button



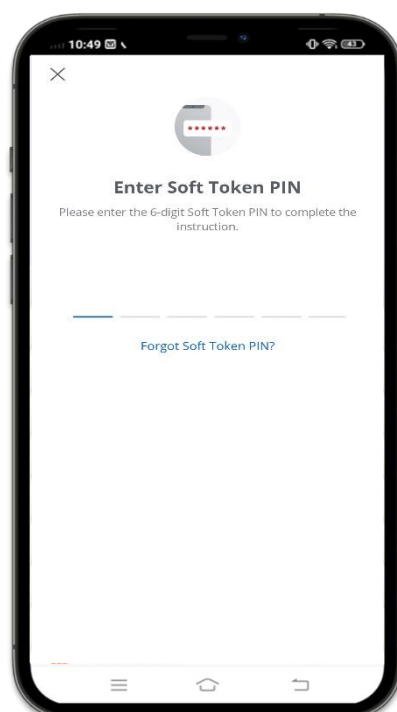
- 4 Input the new contact number



- 5 Input SMS OTP

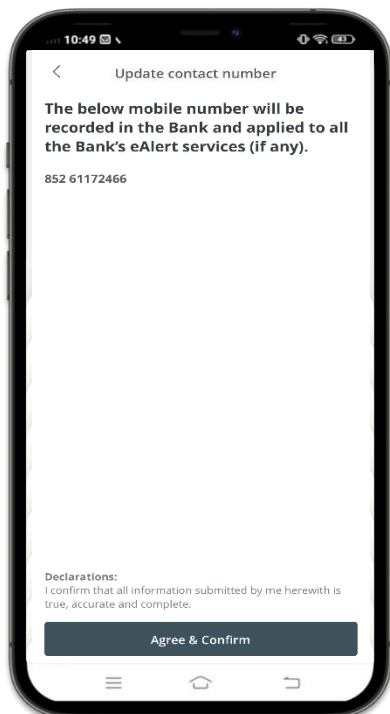


- 6 Input Soft Token PIN

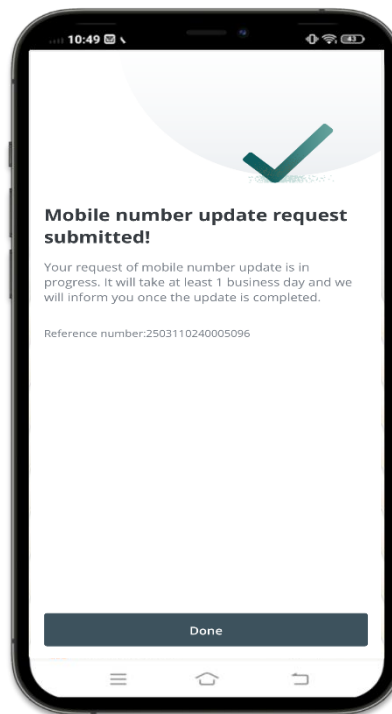


18 Update contact number

7 Review the details and submit the instruction



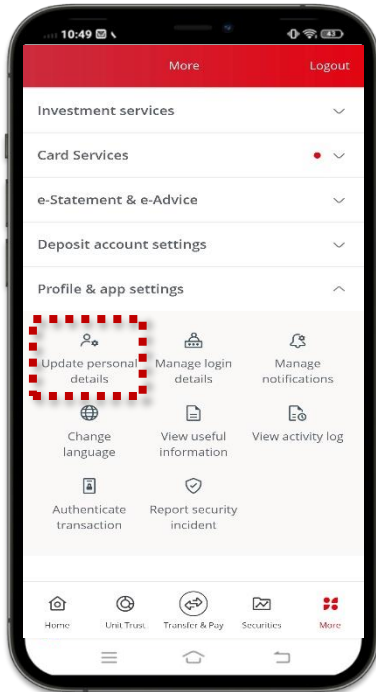
8 Your instruction is submitted



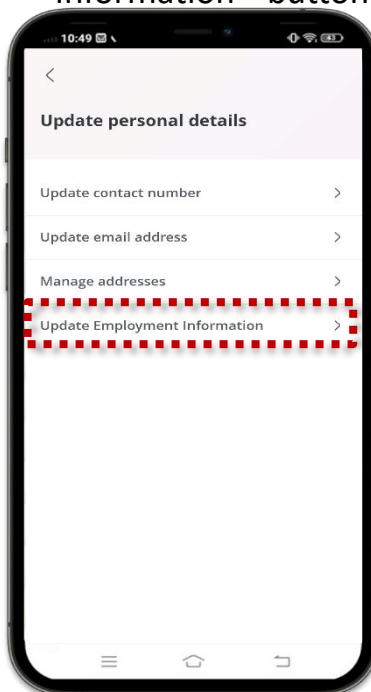
- After an update to your mobile number, all customer notifications or one-time passwords linked to your previous mobile number will become invalid, instead, such notifications and passwords will be applied to your newly updated mobile number.
- The above change of mobile number shall apply to all account(s) and eAlert services (if any) maintained with the Bank and its subsidiaries. If you want to change the mobile number for specific account(s) with the Bank and its subsidiaries, please visit any of our branches for such changes, as this action cannot be supported through the mobile app.
- You will need to submit the relevant amendment form to Hong Kong Life Insurance Limited directly if you hold any of its policy. OCBC will not be responsible for notifying Hong Kong Life Insurance Limited in relation to any changes made to your personal data.
- The new mobile number will take effect within 1 business day, and you will receive an SMS and email notification after the update. If you have any of our credit cards or accounts with our subsidiaries, it will take 5 business days for those account information to be updated. During this period, please do not submit information update form through other channels to avoid duplication.
- If your current mobile number has registered for "FPS" addressing service, the service will be cancelled after the information update takes effect.

19 Update Employment Information

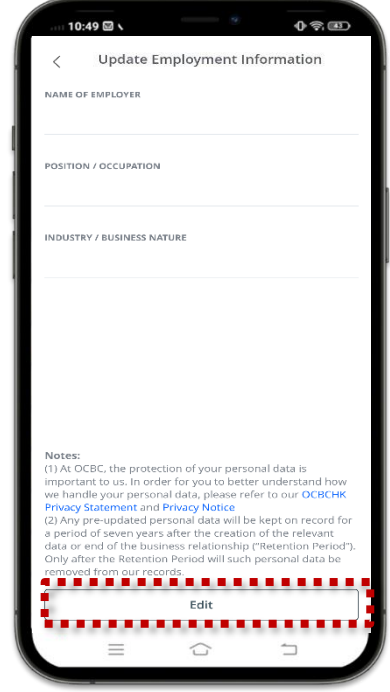
- 1 Select "Update personal details" under "Profile & app setting" in "More"



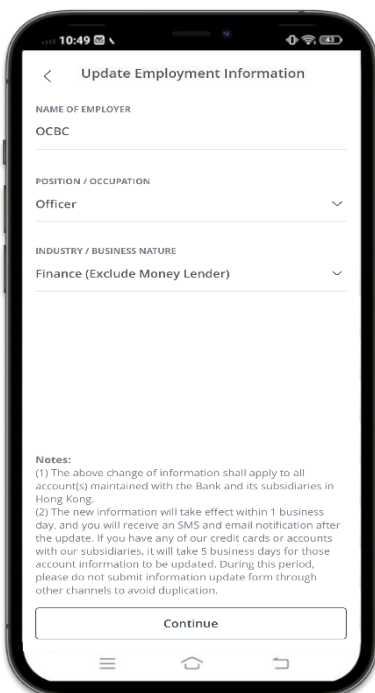
- 2 Select "Update Employment Information" button



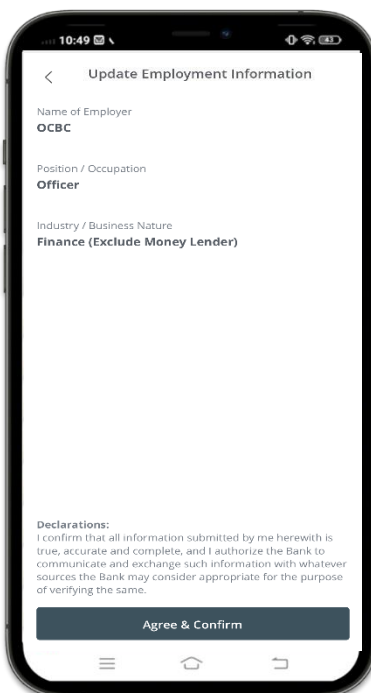
- 3 Click "Edit" button



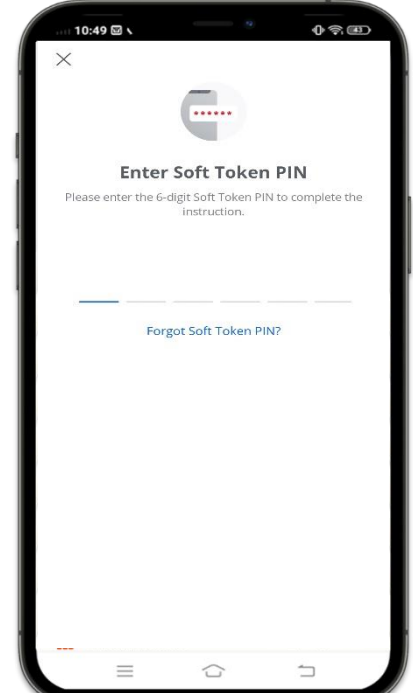
- 4 Input the new employment information



- 5 Review the details and submit the instruction

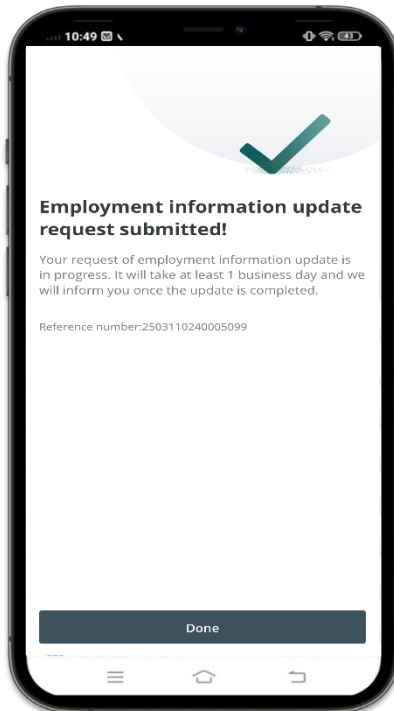


- 6 Input Soft Token PIN



19 Update Employment Information

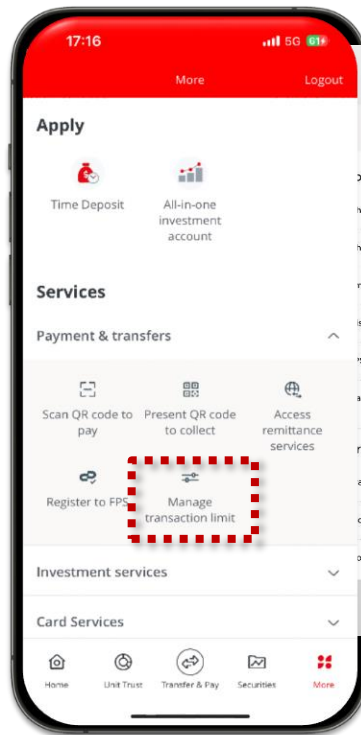
7 Your instruction is submitted



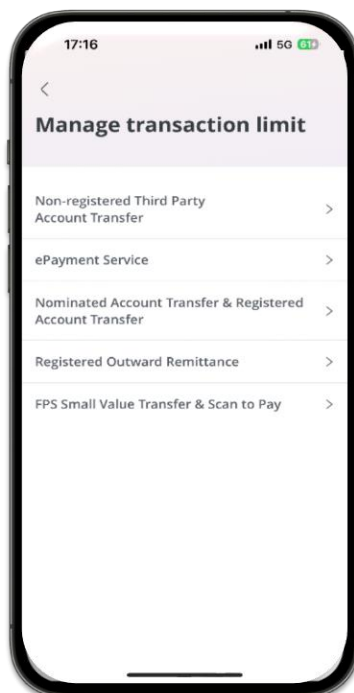
- The above change of information shall apply to all account(s) maintained with the Bank and its subsidiaries in Hong Kong.
- The new information will take effect within 1 business day, and you will receive an SMS and email notification after the update. If you have any of our credit cards or accounts with our subsidiaries, it will take 5 business days for those account information to be updated. During this period, please do not submit information update form through other channels to avoid duplication.

20 Daily Limit Maintenance

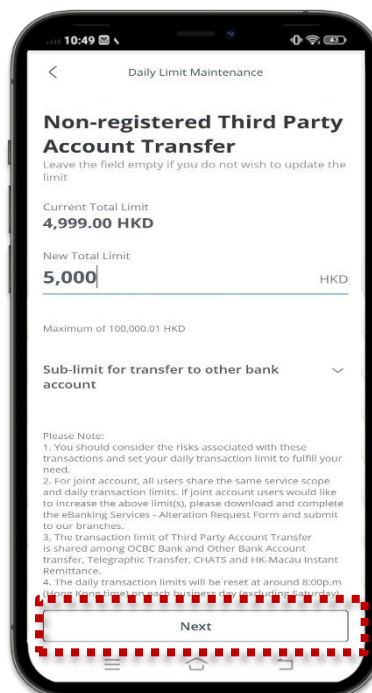
1 Select Manage transaction limit



2 Select the limit category

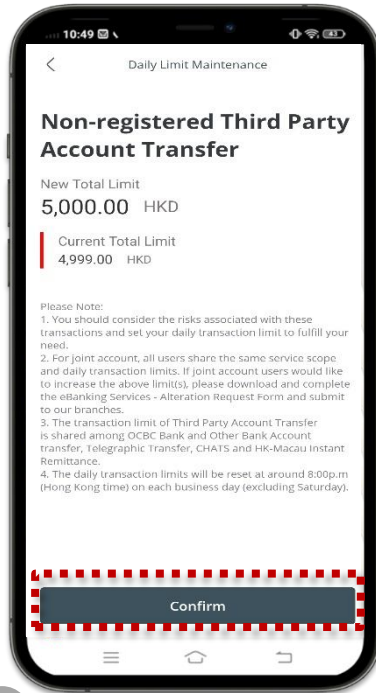


3 Input new limit and click "Next"

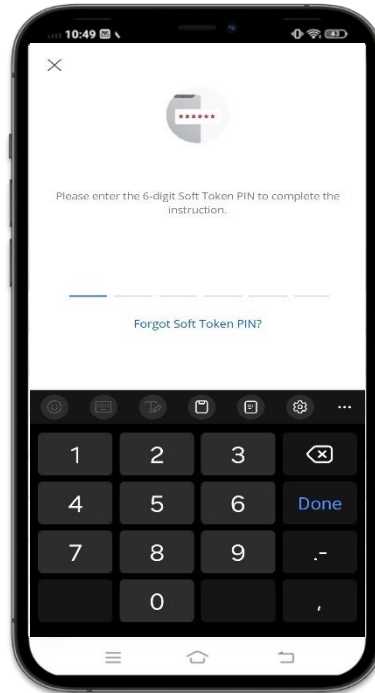


20 Daily Limit Maintenance

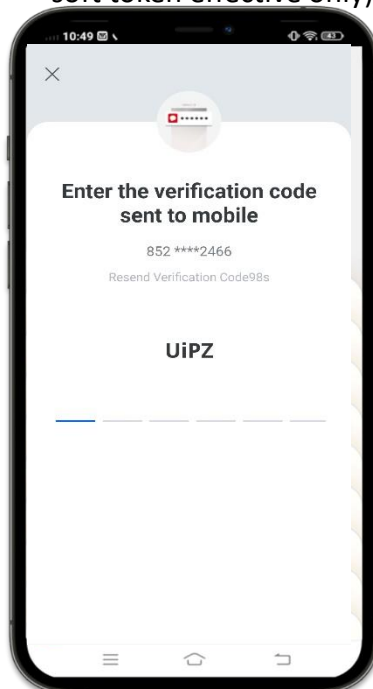
5 Review the new limit and click “Confirm”



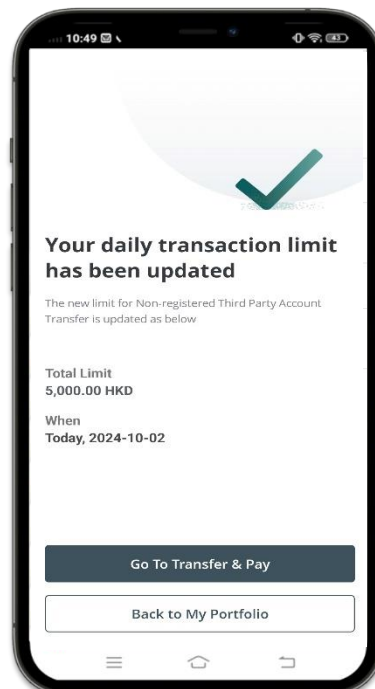
6 Input Soft Token Pin (For increase limit only)



7 Input SMS OTP (For 1st time high risk transaction after soft token effective only)



8 Limit Update Complete



21 “More” function menu

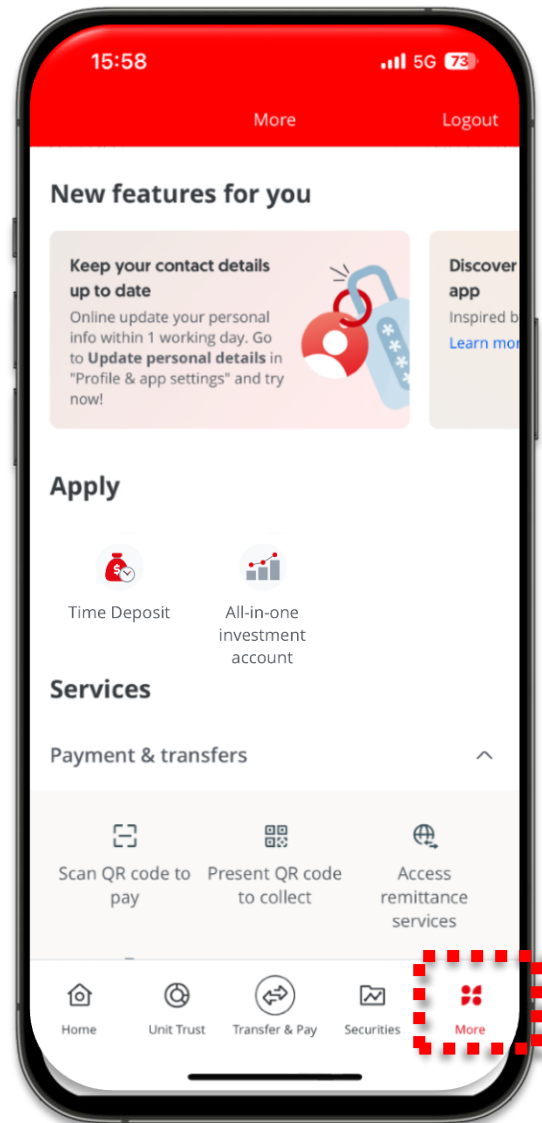
A newly designed function menu for mobile app to replace previous hamburger side menu in providing customer with a more convenient user experience.

New features for you: Check out our top banners for the latest information, promotion offers and useful tips

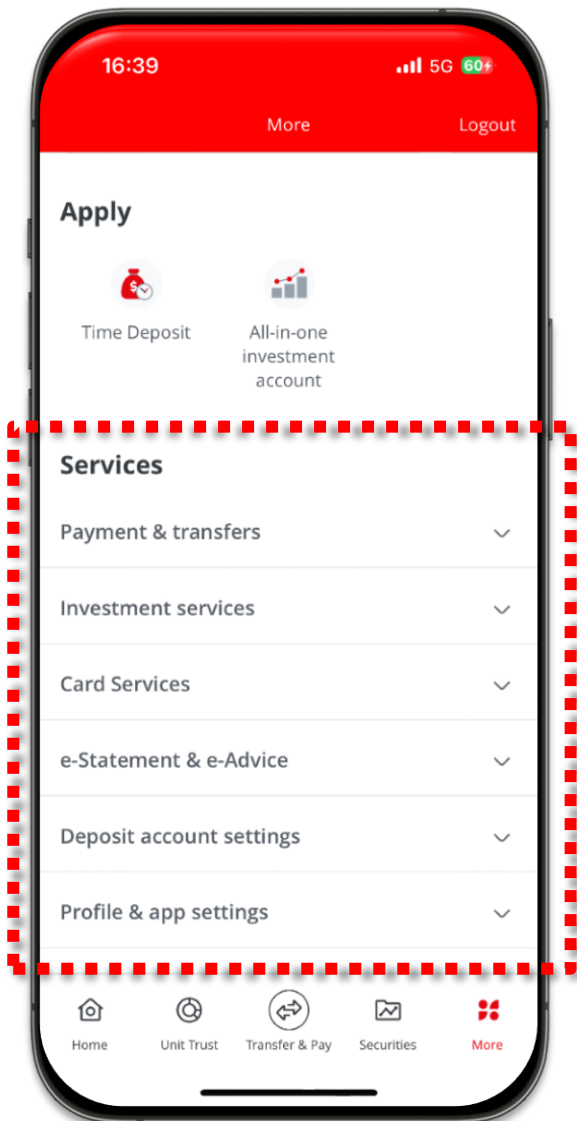
Apply: In just a few taps to apply for products through our smooth and streamlined application flows

Services: Features an intuitive design which allows you to browse through all our products and services easily with below categories.

1. Payment & transfers
2. Investment services
3. Card services
4. E-Statement & e-Advice
5. Deposit account settings
6. Profile & app settings

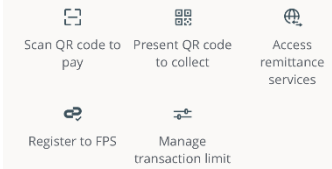


21 “More” function menu

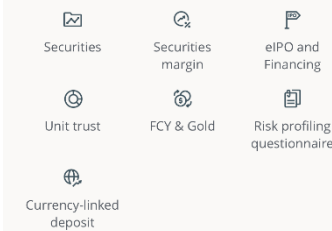


Services

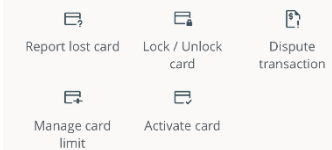
Payment & transfers



Investment services



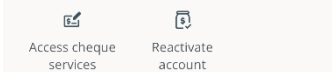
Card Services



e-Statement & e-Advice



Deposit account settings



Profile & app settings

