

Introduction

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- Introducing a new tool call HSBC Remote Engagement Service.
- This service is an alternate channel for our customers to interact with HSBC branch representative to complete services fulfilment without the need to be physically present at the branches.
- The service is supported by Zoom and Live Sign.

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- Zoom is a video conferencing tool that enables you to connect with us remotely during branch operation hours.
- Live Sign is an electronic signature solution for signing documents electronically.
- The Remote Engagement Service is offered to all our existing customers with deposit accounts and is available for all branches.

Benefits

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- It's now much more convenient to get in touch with us for your banking needs.
- It's quick and cuts out travel time by enabling you to execute transactions and applications from the comfort of your home or office.
- And it's environmentally friendly as we try to do away with papers by having documents signed electronically.

Overall Process

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- To get started, get in touch with one of our branch representative to find out more on the products & services available on this platform, or visit HSBC public website.
- If you are interested in the supported Product and Services, our branch representative will proceed to send two documents to your email registered with the bank.
- Before proceeding to use the Remote Engagement Service, you are required to sign the Letter of Authorization & Indemnity, attached with the Remote Engagement Terms of Use electronically using Live Sign.

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- To review and sign the documents, open the email received and click on the link in the email to access the documents through Live Sign.
- You will be routed to a verification page.

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- Live Sign is a secure tool. You will need to verify your identify to access the document.
- There are two verification option, you can select your preferred method.
- If Text Message is selected, a SMS One-Time-Password will be sent to your mobile number registered with the bank.
- If Voice Call is selected, you will receive a phone call at your registered mobile number with the bank. The automated voice call system will read out the verification code.

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- After receiving the verification code, enter the verification code received in the box.
- Click okay to proceed.
- Successful verification will bring the customer to the document signing panel.

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- Read the documents carefully.
- Once customer agree to the contents, use the “Start” arrow to navigate the signing field.
- Click on the yellow box to place your signature as how you would sign a wet signature, and subsequently insert your name and identification number below.
- To complete the document after signing relevant fields, click on the blue button.
- You will be routed to end page after successful agreement signing.
- A copy of the signed agreement can be downloaded by clicking “Download a copy”.

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- A copy of the completely signed document will be sent to you after all parties have signed the document.
- Once everything is in order and you meet the eligibility criteria, our branch representative will send an email with the Zoom meeting invitation and instructions to customer’s registered email address with the bank.
- Follow the email instruction to launch **Zoom** on your device.
- Our branch representative will launch Zoom on an HSBC Device, follow a set of Zoom security guidelines and perform the required customer verifications to proceed.

Eligibility

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To start using the Remote Engagement Service, you need to be an existing HSBC customer located in Malaysia with sole or joint account and meet the following eligibility criteria :

- Have a registered email address with HSBC
- Have a registered mobile number with HSBC
- Received a copy of Remote Engagement Service Terms of Use

- Signed the Letter of Authorization & Indemnity
- Received a copy of Quick Guidance for Zoom & Live Sign

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- After having a conversation on Zoom, there may be relevant forms for you to sign via Live Sign.
- Follow the same steps as before to sign the documents.
- The forms & documents will then be reviewed and documented according to the bank's procedures.
- Once the bank has verified that all is in order, your transactions or instructions will be processed.
- A notification email will be sent to your registered email address once the transaction is successfully processed.

Ending

Get in touch with us now to find out more!