

| | | | |
|---|---------------------|---|---|
| 1. Personal Details 個人資料 | Policy No. 保單編號 | Policy Currency 保單貨幣 | <input type="radio"/> HK\$ 港元 <input type="radio"/> US\$ 美元 |
| Name in English 英文姓名 Name in Chinese 中文姓名 HKID No./Others 香港身份證號碼/其他 | Life Insured 受保人 | Policyowner (if different from Life Insured) 保單權益人 (如非受保人) | |
| | Surname 姓氏 | Surname 姓氏 | |
| | Given Name 名 | Given Name 名 | |
| | () | () | |

2. Details of Change
更改詳情

| | Original Modal Premium 原有之每期保費 | New Modal Premium 新訂之每期保費 |
|---|--|------------------------------|
| <input type="radio"/> Regular Investment Premium 定期投資保費 <input type="radio"/> Add 新購 <input type="radio"/> Delete 刪除 <input type="radio"/> Change 更改 | \$ _____ | \$ _____ |
| <input type="radio"/> Add Booster Investment Premium 新購額外投資保費 | \$ _____ | |
| Amount paid with this Application 隨本申請書一併繳交之金額 | <input type="radio"/> Cash 現金 <input type="radio"/> Cheque 支票 <input type="radio"/> Bank-in 銀行入數 <input type="radio"/> HK\$ 港元 <input type="radio"/> US\$ 美元 : _____ | |

3. Investment Option Allocation (Minimum 10% for each Investment Option & must be multiples of 10%)
投資選擇調配 (每項所選投資選擇最少分配 10%，並須為 10% 的倍數)

| Name of Investment Option 投資選擇名稱 | Investment Option Code 投資選擇代碼 | Allocation (%) of Basic Premium/Regular Investment Premium/Single Premium 基本保費/定期投資保費/ | Allocation (%) of Booster Investment Premium 額外投資保費分配之百分比 |
|-------------------------------------|----------------------------------|---|--|
| | | % | % |
| | | % | % |
| | | % | % |
| | | % | % |
| | | % | % |
| | | Total 合共: | 100 % |
| | | | 100 % |

4. Partial Withdrawal of Investment Option
提取部份投資選擇

| Name of Investment Option 投資選擇名稱 | Investment Option Code 投資選擇代碼 | Percentage of Investment Option Withdrawal 提取部份投資選擇百分比 |
|-------------------------------------|---|---|
| | | % |
| | | % |
| | | % |
| Payment Currency 支付貨幣 | <input type="radio"/> HK\$ 港元 <input type="radio"/> US\$ 美元 | |



5. Investment Option Switching (Minimum 10% for each Investment Option & must be multiples of 10%)
 5. 投資選擇轉換 (每項所選投資選擇最少分配 10%，並須為 10%的倍數)

| Switching Out 轉出 | | | Switching In 轉入 | | |
|-------------------------------------|----------------------------------|-------------------------|-------------------------------------|----------------------------------|-------------------------|
| Name of Investment Option 投資選擇名稱 | Investment Option Code 投資選擇代碼 | Switch Out (%) 轉出百分比 | Name of Investment Option 投資選擇名稱 | Investment Option Code 投資選擇代碼 | Allocation (%) 分配百分比 |
| | | % % | | | % |
| | | | | | % |
| | | | | | % |
| | | | | | % |
| | | | | | % |
| | | | | | Total 合共: 100 % |
| Name of Investment Option 投資選擇名稱 | Investment Option Code 投資選擇代碼 | Switch Out (%) 轉出百分比 | Name of Investment Option 投資選擇名稱 | Investment Option Code 投資選擇代碼 | Allocation (%) 分配百分比 |
| | | % % | | | % |
| | | | | | % |
| | | | | | % |
| | | | | | % |
| | | | | | % |
| | | | | | Total 合共: 100 % |
| Name of Investment Option 投資選擇名稱 | Investment Option Code 投資選擇代碼 | Switch Out (%) 轉出百分比 | Name of Investment Option 投資選擇名稱 | Investment Option Code 投資選擇代碼 | Allocation (%) 分配百分比 |
| | | % % | | | % |
| | | | | | % |
| | | | | | % |
| | | | | | % |
| | | | | | % |
| | | | | | Total 合共: 100 % |

6. Product Suitability Assessments

6. 產品合適性評估

Date of customer's latest Risk Profiling : _____
 客戶最新風險剖析日期 : _____

Customer has completed a customer risk profiling questionnaire within one year and agreed with the result.
 客戶已於一年內作答客戶風險剖析問卷並同意有關結果。

Hong Kong Life Insurance Limited is entitled to reject any requests or instructions which is not completed and submitted in full or delivered together with the payment.

如所須申請文件尚未填妥、尚未齊全或應付款項不足，香港人壽保險有限公司有權不處理有關之任何申請或指示。

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|---|--|------------------------------------|--|-------------------------------------|--|
| <p>This Investment Service Request Form should only be issued in conjunction with the Product Key Facts Statement, Principal Brochure and the illustration document. I/We have read and understood the Principal Brochure before signing this Investment Services Request Form.</p> <p>此投資服務申請書必須連同產品資料概要、主要銷售刊物及退保說明文件一併發出。本人/我們在簽署此投資服務申請書前已詳閱及完全明白有關主要銷售刊物。</p> | | | | | |
| Signed at 簽署地 | / / Date(dd/mm/yyyy) 簽署日期(日/月/年) | Signature of Life Insured 受保人簽署 | | Signature of Policyowner 保單權益人簽署 | |
| Name of Insurance Intermediary 保險中介人姓名 1. _____ | Servicing Bank 代理銀行 _____ | Code/Staff No. 編號 _____ | | | |
| 2. _____ | _____ | _____ | Signature of Insurance Intermediary /Witness 保險中介人/見証人簽署 | | |