

**申請身故賠償支付選項 (適用於「創富未來」多元貨幣計劃 / 「御富」儲蓄壽險計劃 / 「悅月豐盛」儲蓄壽險計劃))**  
**REQUEST OF DEATH BENEFIT SETTLEMENT OPTIONS**  
**(APPLICABLE FOR WEALTH ACCELERATOR MULTI-CURRENCY PLAN / WEALTH PRESTIGE SAVINGS INSURANCE PLAN / MONTHLY HARVEST SAVINGS INSURANCE PLAN)**

**基本計劃名稱**  
Name of Basic Plan

**投保申請書/保單編號**  
Application / Policy No.

**擬保單權益人/保單權益人姓名**  
Name of Proposed Policyowner / Policyowner

**適用於一名或多名受益人 Applicable for one or multiple beneficiary(ies)**

指定受益人姓名 Name of Designated Beneficiary	死亡賠償 分配比例 Share of Death Benefit (%)	身故賠償 支付選項 Death Benefit Settlement Options (請選擇以下其中一個選項) (Please choose one of the options below)	分期領取選項補充資料 Supplementary Information of Installment Payments Option
		<input type="checkbox"/> 分期領取(固定金額) Installment Payments (Fixed Amount)	固定金額 <sup>1,2</sup> Fixed Amount <sup>1,2</sup> _____
		<input type="checkbox"/> 分期領取(固定限期) Installment Payments (Fixed Period)	固定限期 <sup>1,2</sup> Fixed Period <sup>1,2</sup> _____ 年 Years
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		<input type="checkbox"/> 分期遞增領取 <sup>5</sup> Increasing Installment Payments <sup>5</sup>	指定金額 Specified Amount _____

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重要指示  
Important Notes

- 固定金額或固定限期支付都必須符合下例每定期發放之分期要求。  
(i) 分期領取之金額須不少於港元 5,000 或美元等值，並必須為整數；及  
(ii) 分期領取之最少固定限期須為 2 年，而最高固定限期須為 25 年  
Settlement either by Fixed Amount or Fixed Period, it must fulfill the requirements of regular intervals as below.  
(i) The amount of Installment Payments should be at least HKD 5,000 or USD equivalent and must be an integer; AND  
(ii) The minimum Fixed Period for Installment Payment should be at least 2 years and maximum 25 years
- 分期領取將根據保單貨幣派發。  
Installment Payments will be paid according to Policy Currency.
- 指定百分比之身故賠償將會作一次性支付。  
A designated percentage of the Death Benefit will be paid in a lump sum.
- 身故賠償將於受益人到達指定年齡(受益人之年齡)前，以固定金額定期發放。  
Death Benefit will be paid in fixed amount at regular intervals before the Designated Age of the Beneficiary (Beneficiary's Age).
- 如選擇分期遞增領取支付選項，第一(1)期之身故賠償將根據列明於此申請表格上之指定金額發放。往後之分期將由第二(2)年起於每年增加百分之三(3%)之發放金額，直至身故賠償完全付清為止。  
If select Increasing Installment Payments settlement option, Death Benefit will be paid in a specified amount as stated in this prescribed form for the first (1st) installment. The subsequent installments will be increased by three percent (3%) each year starting from the second (2nd) year until Death Benefit is fully settled.
- 任何未發放之身故賠償結餘將會保留在香港人壽保險有限公司積存生息直至全數身故賠償金額及其累積利息(如有)完全付清為止。利率並非保證及香港人壽保險有限公司可全權不時作出更改。  
The unpaid balance of Death Benefit will be left with Hong Kong Life Insurance Limited to accumulate with interest at such non-guaranteed interest rates as may be determined by Hong Kong Life Insurance Limited from time to time at its absolute discretion until the whole amount of Death Benefit plus its accrued interest (if any) are fully settled.
- 假若身故賠償低於港元 120,000 或美元等值，身故賠償支付方式將不予行使。而身故賠償將一次性支付給受益人。  
The Death Benefit Settlement Option will not be exercised if the Death Benefit is less than HKD 120,000 or USD equivalent. The Death Benefit will be paid to the Beneficiaries in a lump sum.
- 如受益人多於一位，保單權益人可為不同受益人選擇不同之身故賠償支付選項。若沒有選擇任何支付選項，本公司將根據本保單之條款以一筆過方式給付身故賠償。  
If more than one Beneficiaries is named, the Policyowner can choose different Death Benefit Settlement Options for different Beneficiaries. If no option is selected, a lump sum payment of Death Benefit shall be paid in accordance with the terms of this Policy.

### 重要指示 (續)

#### Important Notes (Cont'd)

9. 身故賠償支付選項將不能在以下情況下行使(i) 如本保單之任何利益、權利及/或權益根據本保單的條款作為抵押貸款轉讓；或(ii) 任何的受益人是納入遺產、公司、合夥人、機構、信託人或轉讓人，除非得到香港人壽保險有限公司預先發出的書面同意。Death Benefit Settlement Options will not be exercised if (i) any of the benefits, rights and/or interests under the Policy have been assigned as a collateral security in accordance with the terms of the Policy; or (ii) any of the Beneficiaries is an estate, corporation, partnership, association, trustee or assignee except with Hong Kong Life Insurance Limited's prior written consent.
10. 實際首期利益的支付日期只會在本公司收到並接納受保人之相關死亡證明後才可釐定。若沒有指明開始支付日期或受保人於指定開始支付日期後身故，首期利益將於死亡索償獲批准後立即支付。  
The actual date of first (1st) installment payment shall be determined only after the Company has received and accepted satisfactory proof of death of the Life Insured. If no start date is specified or the Life Insured dies after the specified start date, the first (1st) installment payment will be paid immediately after the death claim is approved..
11. 香港人壽保險有限公司有絕對權力不時制定及/或更改任何身故賠償支付的選項、條件、行政規定及要求。有關條款及細則，請參閱保單。如有任何差異，以保單為準。  
Hong Kong Life Insurance Limited has the absolute discretion to impose and/or alter any options, conditions, administrative rules and requirement in respect of the Death Benefit Settlement Options from time to time. For terms and conditions, please refer to the policy document. If there is any conflict, policy document shall prevail.

### 個人資料收集聲明

#### Personal Information Collection Statement

本人/我們確認本人/我們已閱讀及明白香港人壽保險有限公司（「香港人壽」）個人資料收集聲明。本人/我們聲明及同意在本申請所載或香港人壽不時以任何方法收集所得、編製或持有的任何個人資料及關於本人/我們或本人/我們的保單或其他資料，可根據個人資料收集聲明收集及使用。本人/我們知悉及同意就個人資料收集聲明所述目的視乎情況轉讓本人/我們的個人資料（不論在香港或海外）予個人資料收集聲明所載的資料承讓人。個人資料收集聲明的最新版本可於以下網址下載：  
[www.hklife.com.hk](http://www.hklife.com.hk)，及可向香港人壽索取。

I / We confirm that I / we have read and understood the Hong Kong Life Insurance Limited ("Hong Kong Life") Personal Information Collection Statement ("PICS"). I / We declare and agree that any personal data and other information relating to me / us or my / our policy(ies) in this application or collected, obtained, compiled or held by Hong Kong Life by any means from time to time may be collected and utilized in accordance with the PICS. I / We acknowledge and consent to the transfer of my / our personal data (whether within or outside Hong Kong) by Hong Kong Life for the purposes and to the types of transferee as set out in the PICS. The updated version of PICS is available for download from its website: [www.hklife.com.hk](http://www.hklife.com.hk), and is made available upon request.

### 聲明

#### Declaration

本人/吾等作為擬保單權益人/保單權益人，謹此確定本人/吾等已閱讀、明白及同意遵守上述之重要指示。

I / We, the Proposed Policyowner/Policyowner, hereby confirm that I/we have read, understood and agreed to be bound by the above Important Notes.

本人/吾等確認本人/吾等已獲本申請表格指定受益人之同意，提供其個人資料予香港人壽。香港人壽可根據個人資料收集聲明所述之用途，持有、使用、轉移或處理該等資料。

I / We confirm that I / we have obtained the express consent of the designated beneficiary(ies) in this form for providing their personal data which may be held, used, transferred or otherwise processed by the Hong Kong Life for the purposes in accordance with the PICS.



擬保單權益人/保單權益人簽署  
Signature of Proposed Policyowner/Policyowner

簽署地  
Signed at

日 DD / 月 MM / 年 YYYY

日期  
Date



保險中介人簽署  
Signature of Insurance Intermediary

保險中介人姓名  
Name of Insurance Intermediary

分行編號及保險中介人編號  
Branch Code and Insurance Intermediary No.