

指定後續受保人申請書
Designation of Contingent Life Insured Form
(適用於「創富未來」多元貨幣計劃)
(Applicable for "Wealth Accelerator Multi-Currency Plan")



保單編號 Policy No.	
保單權益人姓名 Name of Policyowner	
受保人姓名 Name of Life Insured	

重要事項
Important Notes

1. 申請指定後續受保人

Applying for Designation of Contingent Life Insured

於本計劃有效期間及受保人生存期間，保單權益人可以本公司規定的書面方式申請指定最多三(3)位後續受保人，並且指定後續受保人於受保人身故時成為本保單之受保人的先後次序，惟須得到任何受讓人同意下進行。

While this Plan is in force and the Life Insured is alive, the Policyowner may, by filing written request satisfactory to the Company, apply to designate a maximum of three (3) Contingent Life Insured(s) and designate the sequence of Contingent Life Insured(s) to become the Life Insured of this Policy in the event of death of the Life Insured, subject to the rights of any named assignee.

受限於任何相關法律及條例規限及本公司不時釐定之行政規定及要求的情況下，保單權益人可以申請指定分拆本保單，並且分配本保單指定比例之基本金額至多份獨立新保單（「指定保單」），而就每張指定保單而言，保單權益人可以指定最多三(3)位後續受保人，並且指定後續受保人於受保人身故時成為該指定保單之受保人的先後次序，惟須得到任何受讓人同意下進行。

Subject to any applicable laws and regulations, and the administrative rules and requirements as determined by the Company from time to time, the Policyowner may also submit a request to designate a split of this Policy by allocating a designated portion of the Principal Amount of this Policy to multiple separate new policies ("Designated Policy(ies)") and in respect of each Designated Policy, Policyowner may apply to designate a maximum of three (3) Contingent Life Insured(s) and designate the sequence of Contingent Life Insured(s) to become the Life Insured of such Designated Policy in the event of death of the Life Insured, subject to the rights of any named assignee.

本公司有絕對權力釐定批核指定後續受保人申請之規定及要求，及該規定及要求可包括但不限於下列各項：

The Company has the absolute discretion to determine the rules and requirements for approval of application for the designation of Contingent Life Insured(s), and such rules and requirements may include without limitation the following:

- 申請指定後續受保人須根據核保要求、存在可保利益，通過客戶盡職調查及符合於申請時本公司可能需要的其他條件及要求。實際更改受保人至後續受保人時須受到下列限制及條件所約束；及
the application of the designation of Contingent Life Insured(s) shall be subject to the underwriting, existence of insurable interest, customer due diligence and other conditions and requirements as may be imposed by the Company at the time of application. The actual change of Life Insured to the Contingent Life Insured(s) shall be subject to the limitations and conditions as set out hereunder; and
- 保單權益人須於本公司指定之表格上指明本保單分配至每張指定保單基本金額指定分配比例，並不得低於本公司不時釐定的最低金額要求及任何其他相關要求；及
the designated portion of the Principal Amount to be allocated from this Policy to each Designated Policy must be specified by the Policyowner in such form as prescribed by the Company and subject to the minimum amount or any other relevant requirements as determined by the Company from time to time; and
- 在本公司收妥書面申請時，擬後續受保人不可比最初受保人年長，並須符合保單續發年齡要求，另須提供認可之年齡證明；及
The proposed Contingent Life Insured(s) must not be older than the Initial Life Insured and must fulfill the issue age requirement at the time the Company receives the written request, and satisfactory proof of Age to the Company is required; and
- 本保單及指定保單之基本金額於行使指定後續受保人選項後不得低於本公司不時釐定的最低金額要求；及
the Principal Amount of this Policy and the Designated Policy(ies) after exercising the designation of Contingent Life Insured option must not less than the minimum amount requirement as determined by the Company from time to time; and
- 保單權益人、受保人及所有後續受保人須於本公司指定之申請表格上簽署。
a written request in the Company's prescribed form signed by the Policyowner, the Life Insured and all Contingent Life Insured(s).

當指定後續受保人申請獲得本公司接納及批准後，該次指定後續受保人申請須於受保人及後續受保人生存期間並經本公司記錄在案及本公司發出書面批註確認，方為有效。在該次指定後續受保人申請生效日前，本公司就已給付的所有款項及所作之其他行動均不會承擔任何責任。

Once the application for the designation of Contingent Life Insured is accepted and approved by the Company, such designation of Contingent Life Insured will be deemed to be effective as of the date the application notice is recorded during the lifetime of the Life Insured and Contingent Life Insured(s) and endorsed by the Company by way of a written endorsement to be issued by the Company. The Company shall not be responsible for any payment made or other action taken before the effective date of such designation.



重要事項(續)

Important Notes (Con't)

若新的指定後續受保人申請已獲本公司接納及確認，任何本公司先前已經記錄及確認本保單之後續保單權益人及後續受保人將自動被取消及移除。

Any Contingent Policyowner(s) and Contingent Life Insured(s) of this Policy as previously recorded and endorsed by the Company will be automatically cancelled and removed once a new application for the designation of Contingent Life Insured is accepted and approved by the Company.

根據本保單「保單權益」條款，當轉移本保單之權益至新的保單權益人，其將擁有申請指定後續受保人的權利，任何本公司先前已經記錄及確認本保單之後續受保人將自動被取消及移除。

Any Contingent Life Insured(s) of this Policy as previously recorded and endorsed by the Company will be automatically cancelled and removed upon a transfer of the ownership of this Policy pursuant to the "Ownership" clause of this Policy to a new Policyowner who has the right to make an application for the designation of Contingent Life Insured.

2. 實際更改受保人

Actual Change of Life Insured

於本保單有效期內，當受保人於第一(1)個保單週年日或以後身故，本公司將在收到受保人之死亡證明及任何所需文件後，實際更改受保人至後續受保人將會獲得批准及生效，惟須參照下列條件及限制及本公司當時行政規定及要求：

Upon the death of the Life Insured on or after the first (1st) Policy Anniversary while this Policy is in force, the actual change of Life Insured to the Contingent Life Insured shall be approved and becomes effective subject to the Company's receipt of satisfactory proof of the Life Insured's death and any documents as requested, the following conditions and limitation, and the prevailing administrative rules and requirements of the Company:

- (i) 後續受保人須根據核保要求、存在可保利益，通過客戶盡職調查及符合於確認後續受保人更改成為受保人前本公司可能需要的其他條件及要求。
The Contingent Life Insured shall be subject to the underwriting, existence of insurable interest, customer due diligence and other conditions and requirements as may be imposed by the Company before endorsement of the Contingent Life Insured to become the Life Insured.
- (ii) 本保單或每張指定保單（如適用）只有一位後續受保人可成為受保人。實際更改受保人至後續受保人將根據保單權益人指定次序轉移至第一位仍然生存之後續受保人。當本公司已批准其中一位後續受保人成為本保單或指定保單（如適用）之受保人，其他於本保單或同一指定保單（如適用）已獲本公司記錄及確認之後續受保人（如有）將自動被取消及移除。
Only one (1) Contingent Life Insured is allowed to become the Life Insured of this Policy or each of Designated Policies (where applicable). Actual change of Life Insured to the Contingent Life Insured will be pursuant to the sequence designated by the Policyowner to the first surviving Contingent Life Insured. Other Contingent Life Insured(s) (if any) under this Policy or the same Designated Policy (where applicable) as previously recorded and endorsed by the Company shall be automatically cancelled and removed when one of the Contingent Life Insured(s) is approved by the Company to become the Life Insured of this Policy or the Designated Policy (where applicable).
- (iii) 保單權益人（或，若保單權益人已經身故，根據本保單「指定後續保單權益人」條款，後續保單權益人將成為新的保單權益人）及後續受保人成為本保單或指定保單（如適用）新的受保人時仍然生存。
The Policyowner (or, if the Policyowner is not alive, the Contingent Policyowner who shall become the new Policyowner pursuant to the "Designation of Contingent Policyowner" clause of this Policy) and Contingent Life Insured must be alive when the Contingent Life Insured becomes the new Life Insured of this Policy or the Designated Policy(ies) (where applicable).
- (iv) 若保單權益人並未申請分配本保單之基本金額，當後續受保人成為本保單新的受保人後，本保單將繼續生效。
If the Policyowner does not apply to allocate the Principal Amount of this Policy, this Policy shall continue to be in force when the Contingent Life Insured becomes the new Life Insured of this Policy.
若保單權益人申請分配本保單之基本金額至指定保單，指定保單將根據保單權益人指明相關指定比例繕發，而本保單將於批註日自行終止。後續受保人將成為全新繕發的指定保單之受保人。
If the Policyowner apply to allocate the Principal Amount of this Policy to Designated Policy(ies), Designated Policy(ies) shall be issued in accordance with the designated portion as specified by the Policyowner and this Policy shall automatically terminate on the date of endorsement. The Contingent Life Insured(s) shall become the Life Insured of the newly issued Designated Policy(ies).
當本指定後續受保人選項生效，以下之條件及限制將適用於本保單或指定保單（如適用）：
Once this designation of Contingent Life Insured takes effect, the following terms and conditions shall apply for this Policy or the Designated Policy(ies) (where applicable):
 - (a) 指定保單並沒有冷靜期。
There is no cooling-off period for the Designated Policy(ies).
 - (b) 指定保單之保單貨幣、保單日、繕發日、保費供款年期及保單年度將維持與本保單相同。
The Policy Currency, Policy Date, Issue Date, Premium Payment Term and Policy Years of the Designated Policy(ies) will be the same as this Policy.
 - (c) 除非另外註明，本保單之所有保障、條件及限制將適用於指定保單。
Unless otherwise specified, all benefits, terms and conditions of this Policy will apply to the Designated Policy(ies).
 - (d) 本保單之滿期日或指定保單之滿期日（如適用）將根據新受保人之年齡作更新。
The Maturity Date of this Policy or the Maturity Date of the Designated Policy(ies) (where applicable) shall be adjusted based on the Age of the new Life Insured.



重要事項(續)

Important Notes (Con't)

- (e) 指定保單之基本金額將根據保單權益人闡明之指定比例計算。

The Principal Amount of the Designated Policy(ies) shall be calculated according to the designated portion as specified by the Policyowner.

所有指定保單之保單價值(如適用)，包括保證現金價值、週年紅利(如有)、終期紅利(如有)、保費(如有)、繳付保費總額亦將根據保單權益人闡明之指定比例作出調整。

All policy values under the Designated Policy(ies), including the Guaranteed Cash Value, Annual Dividend (if any), Terminal Dividend (if any), premium (if any), Total Premiums Paid shall also be adjusted in accordance to the designated portion as specified by the Policyowner.

行使指定後續受保人選項後指定保單之基本金額及保單價值將會作出調整，並會用以計算指定保單之身故賠償、滿期利益、「財富傳承」獎賞(如有)及失去行為能力保障(如有)。

為免存疑，指定保單之「財富傳承」獎賞的最高賠償金額將根據保單權益人闡明之指定比例作出相應調整。

The adjustment of Principal Amount and policy values in the Designated Policy(ies) after exercising the designation of Contingent Life Insured option will become the basis for the calculation of Death Benefit, Maturity Benefit, Wealth Succession Bonus (if any) and Incapacity Benefit (if any) in the Designated Policy(ies).

For the avoidance of doubt, the maximum amount payable for Wealth Succession Bonus in the Designated Policy(ies) will be adjusted accordingly in accordance to the designated portion as specified by the Policyowner.

為免存疑，指定保單之「財富傳承」獎賞的最高賠償金額將根據保單權益人闡明之指定比例作出相應調整。

For the avoidance of doubt, the maximum amount payable for Wealth Succession Bonus in the Designated Policy(ies) will be adjusted accordingly in accordance to the designated portion as specified by the Policyowner.

- (f) 所有本保單之附加保障(如有)將於本保單之批註日自行終止，預收之保費將不予發還。新受保人將可根據本公司不時釐定的核保及行政規則及要求於本保單或指定保單(如適用)申請相關附加保障。

All Supplementary Benefit(s) (if any) of this Policy will be terminated automatically on the date of endorsement of this Policy and no unearned premium shall be refunded. The relevant Supplementary Benefit(s) can be applied in respect of the new Life Insured in this Policy or the Designated Policy(ies) (where applicable) subject to the underwriting and administrative rules and requirements as determined by the Company from time to time.

- (g) 除非另外註明，任何本公司先前已經記錄及確認本保單之後續保單權益人、失去行為能力保障領取人、身故賠償支付選項及受益人將會保留於本保單，並且適用於指定保單。

Any Contingent Policyowner, Incapacity Benefit Recipient, Death Benefit Settlement Options and Beneficiary of this Policy as previously recorded and endorsed by the Company will be kept under this Policy and applied to Designated Policy(ies) unless otherwise specified.

- (v) 就本保單或每張指定保單(如適用)而言，若沒有指定及仍然生存之後續受保人於受保人身故後符合上述條件，本公司將支付受益人身故賠償，並扣除欠款(如有)。

For this Policy or each Designated Policy (where applicable), if there is no named and surviving Contingent Life Insured(s) who fulfills the above conditions after the death of the Life Insured, the Company shall pay to Beneficiary the Death Benefit less Indebtedness (if any).

- (vi) 若指定保單之基本金額低於本公司不時釐定的最低金額要求，本公司將支付受益人指定比例之身故賠償，並扣除欠款(如有)。
If the Principal Amount of the Designated Policy(ies) does not fulfill the minimum Principal Amount requirement as determined by the Company, the Company shall pay to Beneficiary the designated portion of the Death Benefit less Indebtedness (if any).

- (vii) 若已指定後續受保人及本公司已批准實際更改受保人，後續受保人將成為本保單新的受保人或指定保單新的受保人(如適用)，根據指定比例之基本金額而計算之身故賠償將不會支付予受益人。

If Contingent Life Insured is designated and the actual change of Life Insured is approved by the Company, the Contingent Life Insured will become the new Life Insured of this Policy or the new Life Insured of Designated Policy(ies) (where applicable). Death Benefit as calculated in accordance to the designated portion of the Principal Amount shall not be paid to the Beneficiary.

- (viii) 若後續受保人與受保人同時身故，或不可能決定他們的死亡次序，後續受保人將視為先於受保人身故。

If the Contingent Life Insured and Life Insured die simultaneously or if it is impossible to determine the sequence of their deaths, the Contingent Life Insured shall be deemed to have died before the Life Insured.

- (ix) 為免存疑，若受保人於第一(1)個保單週年日前身故，後續受保人將不能成為受保人，並且根據本保單之條款，本保單將會終止。

For the avoidance of doubt, if the Life Insured dies before the first (1st) Policy Anniversary, the Contingent Life Insured shall not become the Life Insured and this Policy shall be terminated in accordance with the terms of this Policy.

本公司保留權利不接受任何指定後續受保人申請及不批准實際更改受保人至後續受保人。

The Company reserves the right not to accept any application of the designation of Contingent Life Insured and not to approve the actual change of Life Insured to the Contingent Life Insured.

當成功行使指定後續受保人選項，本公司將會發出批註及修訂之承保表以記錄本保單已經行使指定後續受保人選項；或就每張指定保單繕發全新一套保單文件(如適用)。

Upon the successful execution of the designation of Contingent Life Insured option, the Company shall issue an endorsement with the revised Policy Schedule to record the execution of the designation of Contingent Life Insured option in this Policy; or issue a new set of policy document for each Designated Policy (if applicable).



行政規定及要求

Administration Rules and Requirements

1. 申請書及所需文件，請於簽署日期起 14 個工作天內交回本公司。
Please return all signed forms and required documents to the Company within fourteen working days from the date of signing.
2. 後續受保人須符合本公司核保規則及要求。
The Contingent Life Insured must fulfill the underwriting rules and requirements as determined by the Company.
3. 當受保人身故，後續受保人成為新的受保人時，本公司辦理更改時，後續受保人的年齡必須在該基本計劃的投保年齡範圍之內。
Upon the death of the Life Insured, The Contingent Life Insured becomes the new Life Insured. The age of Contingent Life Insured must be within the range of issue age of the Basic Plan when the Company execute the change.
4. 後續受保人不可比最初受保人年長。
The Contingent Life Insured must not be older than the Initial Life Insured.
5. 保單權益人、受保人(年齡為 18 歲或以上)、後續受保人(年齡為 18 歲或以上)、受讓人(如有)須在此申請表格簽署。保單權益人簽名必須與本公司最近的記錄相符。
This form must be signed by the Policyowner, Life Insured (aged 18 or above), Contingent Life Insured (aged 18 or above), Assignee (if any). The signature of the Policyowner must be corresponded to the Company's latest available record.
6. 保單權益人、受保人及後續受保人等確認完全知悉，及已同意此申請。
The Policyowner/Life Insured/Contingent Life Insured confirm that they all are fully aware of and have consented to this request.
7. 須提供本公司認保單權益人與後續受保人可保之證明。
The evidence of insurability including the insurable interest for the Policyowner and Contingent Life Insured satisfactory to the Company must be submitted.
8. 若未能符合有關的規定，本公司有權不接受此更改申請。手續辦理後，申請將不能取消。
The Company has the right not to accept this request for change if not fulfilling the Company's requirements. Once the request is processed, it cannot be cancelled.
9. 行政指引如有更改，恕不另行通知。
Administration rules are subject to change without prior notice.
10. 若本申請書的中文與英文版有差異，一概以英文版本為準。
In the event of conflicts between the Chinese and the English versions of the Application Form, the English version shall prevail.

所需文件

Required Documents

1. 申請後續受保人，請遞交後續受保人的身分證文件副本及保單權益人與後續受保人之可保利益證明。(例如：出生證明書、結婚證明書)
For application for designation of Contingent Life Insured, please submit copy of identification document of the Contingent Life Insured and evidence of insurability including the insurable interest between Policyowner and the Contingent Life Insured. (e.g. Birth Certificate, Marriage Certificate)

請選擇其中一個選項：

Please select one of the following option:

選項一

Option 1



於本計劃有效期內及受保人生存期間，保單權益人可以本公司規定的書面方式申請指定最多三(3)位後續受保人，並且指定後續受保人於受保人身故時成為本保單之受保人的先後次序，惟須得到任何受讓人同意下進行。(本保單只有一位後續受保人可成為受保人)

While this Plan is in force and the Life Insured is alive, the Policyowner may, by filing written request satisfactory to the Company, apply to designate a maximum of three (3) Contingent Life Insured(s) and designate the sequence of Contingent Life Insured(s) to become the Life Insured of this Policy in the event of death of the Life Insured, subject to the rights of any named assignee. (Only one Contingent Life Insured is allowed to become the Life Insured of this Policy)

選項二

Option 2



受限於任何相關法律及條例規限及本公司不時釐定之行政規定及要求的情況下，保單權益人亦可申請於受保人身故時將本保單分拆，並且分配本保單指定比例之基本金額至多份獨立新保單（「指定保單」）。而就每張指定保單而言，保單權益人更可以指定最多三(3)位後續受保人，並且指定後續受保人於受保人身故時成為該指定保單之受保人的先後次序，惟須得到任何受讓人同意下進行。

Subject to any applicable laws and regulations, and the administrative rules and requirements as determined by the Company from time to time, the Policyowner may also submit a request to designate a split of this Policy by allocating a designated portion of the Principal Amount of this Policy to multiple separate new policies ("Designated Policy(ies)") and in respect of each Designated Policy, Policyowner may apply to designate a maximum of three (3) Contingent Life Insured(s) and designate the sequence of Contingent Life Insured(s) to become the Life Insured of such Designated Policy in the event of death of the Life Insured, subject to the rights of any named assignee.



選項一 Option 1			
指定後續受保人及其先後次序 Designate Contingent Life Insured(s) and the sequence			
後續受保人 Contingent Life Insured	次序一 Sequence 1	次序二（如適用） Sequence 2 (if applicable)	次序三（如適用） Sequence 3 (if applicable)
中文姓名 In Chinese Name			
英文姓名 In English Name			
其他名字 Other Names			
身分證文件及號碼 Identity Document No.	<div><input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card</div> <div><input type="checkbox"/> 香港居民身份證 HK Resident ID Card</div> <div><input type="checkbox"/> 身份證 ID Card</div> <div><input type="checkbox"/> 護照 Passport</div> <div><input type="checkbox"/> 出世紙 Birth Certificate</div> <div>號碼 No. _____</div>	<div><input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card</div> <div><input type="checkbox"/> 香港居民身份證 HK Resident ID Card</div> <div><input type="checkbox"/> 身份證 ID Card</div> <div><input type="checkbox"/> 護照 Passport</div> <div><input type="checkbox"/> 出世紙 Birth Certificate</div> <div>號碼 No. _____</div>	<div><input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card</div> <div><input type="checkbox"/> 香港居民身份證 HK Resident ID Card</div> <div><input type="checkbox"/> 身份證 ID Card</div> <div><input type="checkbox"/> 護照 Passport</div> <div><input type="checkbox"/> 出世紙 Birth Certificate</div> <div>號碼 No. _____</div>
國籍 Nationality			
出生日期（日/月/年） Date of Birth (DD/MM/YYYY)			
性別 Sex	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female
與現時保單權益人之關係 Relationship to the Existing Policyowner			
住宅地址 Residential Address (恕不接受郵政信箱) (P.O. Box address is not accepted)			
聯絡電話號碼 Contact Telephone No.			

選項二 Option 2			
分配保單指定比例及指定後續受保人及其先後次序 Allocation of Designated Portion of Policy and designate Contingent Life Insured(s) and the sequence			
甲部 一分配保單指定比例 Part A – Allocation of Designated Portion of Policy			
	指定保單1 Designated Policy 1	指定保單2 (如適用) Designated Policy 2 (if applicable)	指定保單3 (如適用) Designated Policy 3 (if applicable)
指定比例 Designated Portion	_____ %	_____ %	_____ %
申請指定保單之指定後續受保人 Request to designate Contingent life insured of Designated Policy	指定保單一之指定後續受保人，請填乙部(i) To designate Contingent Life Insured for Designated Policy 1, please complete Part B (i)	指定保單二之指定後續受保人，請填乙部(ii) To designate Contingent Life Insured for Designated Policy 2, please complete Part B (ii)	指定保單三之指定後續受保人，請填乙部(iii) To designate Contingent Life Insured for Designated Policy 3, please complete Part B (iii)

乙部 (i) Part B (i)	指定保單一 Designated Policy 1		
後續受保人* Name of Contingent Life Insured*	次序一 Sequence 1	次序二 (如適用) Sequence 2 (if applicable)	次序三 (如適用) Sequence 3 (if applicable)
中文姓名 In Chinese Name			
英文姓名 In English Name			
其他名字 Other Names			
身分證文件及號碼 Identity Document No.	<input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card <input type="checkbox"/> 香港居民身份證 HK Resident ID Card <input type="checkbox"/> 身份證 ID Card <input type="checkbox"/> 護照 Passport <input type="checkbox"/> 出世紙 Birth Certificate 號碼 No. _____	<input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card <input type="checkbox"/> 香港居民身份證 HK Resident ID Card <input type="checkbox"/> 身份證 ID Card <input type="checkbox"/> 護照 Passport <input type="checkbox"/> 出世紙 Birth Certificate 號碼 No. _____	<input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card <input type="checkbox"/> 香港居民身份證 HK Resident ID Card <input type="checkbox"/> 身份證 ID Card <input type="checkbox"/> 護照 Passport <input type="checkbox"/> 出世紙 Birth Certificate 號碼 No. _____
國籍 Nationality			
出生日期 (日/月/年) Date of Birth (DD/MM/YYYY)			
性別 Sex	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female
與現時保單權益人之關係 Relationship to the Existing Policyowner			
住宅地址 Residential Address (恕不接受郵政信箱) (P.O. Box address is not accepted)			
聯絡電話號碼 Contact Telephone No.			

*本保單只有一位後續受保人可成為受保人
Only one Contingent Life Insured is allowed to become the Life Insured of this Policy

乙部 (ii) Part B (ii)	指定保單二 Designated Policy 2		
後續受保人* Name of Contingent Life Insured*	次序一 Sequence 1	次序二（如適用） Sequence 2 (if applicable)	次序三（如適用） Sequence 3 (if applicable)
中文姓名 In Chinese Name			
英文姓名 In English Name			
其他名字 Other Names			
身分證明文件及號碼 Identity Document No.	<input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card <input type="checkbox"/> 香港居民身份證 HK Resident ID Card <input type="checkbox"/> 身份證 ID Card <input type="checkbox"/> 護照 Passport <input type="checkbox"/> 出世紙 Birth Certificate 號碼 No. _____	<input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card <input type="checkbox"/> 香港居民身份證 HK Resident ID Card <input type="checkbox"/> 身份證 ID Card <input type="checkbox"/> 護照 Passport <input type="checkbox"/> 出世紙 Birth Certificate 號碼 No. _____	<input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card <input type="checkbox"/> 香港居民身份證 HK Resident ID Card <input type="checkbox"/> 身份證 ID Card <input type="checkbox"/> 護照 Passport <input type="checkbox"/> 出世紙 Birth Certificate 號碼 No. _____
國籍 Nationality			
出生日期（日/月/年） Date of Birth (DD/MM/YYYY)			
性別 Sex	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female
與現時保單權益人之關係 Relationship to the Existing Policyowner			
住宅地址 Residential Address (恕不接受郵政信箱) (P.O. Box address is not accepted)			
聯絡電話號碼 Contact Telephone No.			

*本保單只有一位後續受保人可成為受保人
Only one Contingent Life Insured is allowed to become the Life Insured of this Policy

乙部 (iii) Part B (iii)	指定保單三 Designated Policy 3		
後續受保人* Name of Contingent Life Insured*	次序一 Sequence 1	次序二 (如適用) Sequence 2 (if applicable)	次序三 (如適用) Sequence 3 (if applicable)
中文姓名 In Chinese Name			
英文姓名 In English Name			
其他名字 Other Names			
身分證明文件及號碼 Identity Document No.	<input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card <input type="checkbox"/> 香港居民身份證 HK Resident ID Card <input type="checkbox"/> 身份證 ID Card <input type="checkbox"/> 護照 Passport <input type="checkbox"/> 出世紙 Birth Certificate 號碼 No. _____	<input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card <input type="checkbox"/> 香港居民身份證 HK Resident ID Card <input type="checkbox"/> 身份證 ID Card <input type="checkbox"/> 護照 Passport <input type="checkbox"/> 出世紙 Birth Certificate 號碼 No. _____	<input type="checkbox"/> 香港永久性居民身份證 HK Permanent Resident ID Card <input type="checkbox"/> 香港居民身份證 HK Resident ID Card <input type="checkbox"/> 身份證 ID Card <input type="checkbox"/> 護照 Passport <input type="checkbox"/> 出世紙 Birth Certificate 號碼 No. _____
國籍 Nationality			
出生日期 (日/月/年) Date of Birth (DD/MM/YYYY)			
性別 Sex	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female
與現時保單權益人之關係 Relationship to the Existing Policyowner			
住宅地址 Residential Address (恕不接受郵政信箱) (P.O. Box address is not accepted)			
聯絡電話號碼 Contact Telephone No.			

*本保單只有一位後續受保人可成為受保人
Only one Contingent Life Insured is allowed to become the Life Insured of this Policy

收集個人資料聲明

Personal Information Collection Statement

香港人壽保險有限公司（「香港人壽」/「本公司」）在收集、使用、轉移、保留及儲存個人資料時，會致力遵守《個人資料（私隱）條例（第486章）》（「條例」）。

Hong Kong Life Insurance Limited ("Hong Kong Life"/"the Company") is committed to complying with the Personal Data (Privacy) Ordinance (Cap. 486) (the "Ordinance") in relation to the collection, use, transfer, retention and storage of personal data.

1. 收集個人資料的重要性

Importance of Personal Data Collection

客戶及其他個別人士（下稱「資料當事人」）需要不時向香港人壽提供個人資料，使香港人壽可提供保險及/或有關的產品及服務予資料當事人及/或處理有關香港人壽簽發的保單之索償、資料當事人的任何和所有要求、查詢及投訴。提供個人資料予香港人壽純屬自願性質，但若未能按要求提供所需的個人資料，可能會導致香港人壽無法處理保險申請或提供或繼續提供保險產品及服務及/或其他相關產品及/或服務予資料當事人。

From time to time, it is necessary for customers and various other individuals (collectively referred to as "data subject(s)") to provide personal data to Hong Kong Life in connection with the provision of insurance and/or related products and services to the data subjects and/or the processing of claims under insurance policies issued by Hong Kong Life and any and all of the requests, enquiries and complaints from the data subjects. The provision of such personal data is voluntary, but failure to do so may result in Hong Kong Life being unable to process the insurance applications or to provide or continue to provide the insurance products and services and/or the related products and/or services to the data subjects.

2. 個人資料收集目的

Purposes of Collecting Personal Data

香港人壽收集所需的個人資料是為處理投保或其他保險或財務產品及/或服務之申請，及提供所有關於該等申請之繼後服務、進行身分審查或信用審查、處理理賠或其有關分析、處理權益轉讓協議、統計或精算研究用途、訴訟、通訊、內部或外界審計、提供客戶服務（包括但不限於處理查詢及投訴）及有關活動、直接銷售保險產品、資料核對、與任何因香港人壽提供的產品及/或服務之機構或人士溝通，促使香港人壽可與實在或建議的受讓人、或香港人壽對資料當事人的權利的參與人或附屬參與人評核意圖成為轉讓、參與或附屬參與的交易及為符合根據下述適用於香港人壽或期望香港人壽遵從有關披露及使用資料之責任、規定或安排（包括但不限於）：

Hong Kong Life collects necessary personal data for the purposes of processing insurance application or any other applications for insurance or financial related products and/or services and providing all on-going services relating to such applications, conducting identity or credit checks, claim processing or any analysis of it, assignment processing, statistical or actuarial research, litigation, communication, internal or external audit, providing customer services (including but not limited to, processing enquiries and complaints) and related activities, direct marketing for insurance products, data matching, communicating with any relevant organization or person in respect of any products and/or services provided by Hong Kong Life, enabling an actual or proposed assignee of Hong Kong Life, or participant or sub-participant of Hong Kong Life's rights in respect of the data subjects to evaluate the transaction intended to be the subject of the assignment, participation or sub-participation, and complying with the obligations, requirements or arrangements for disclosing and using data that apply to Hong Kong Life or that it is expected to comply according to the following (including but not limited to) :

- (a) 在香港境內或境外之現存及將來對其具約束力之任何本地或海外法律；
any local or foreign law binding on or applying to it within or outside Hong Kong existing currently and in the future;
- (b) 在香港境內或境外之現存及將來並由任何法定、監管、政府、稅務、執法或其他機構，或由金融服務提供者之行業的團體或組織所發出或提供之任何指引或指導；
any guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or industry bodies or associations of financial services providers within or outside Hong Kong existing currently and in the future;
- (c) 香港人壽因其金融、商業、營業或其他利益或活動處於或關連於相關本地或海外的法定、監管、政府、稅務、執法或其他機構或金融服務提供者之行業團體或組織之司法管轄區而須承擔或獲施加與本地或海外之法定、監管、政府、稅務、執法或其他機構或金融中介人、或金融服務提供者之行業團體或組織之間的現有或將來之任何合約承諾或其他承諾及/或香港人壽遵守適用稅務法律的義務，包括但不限於根據香港與美國之間的跨政府協議之《外國賬戶稅務合規法案》和經濟合作暨發展組織作出的規定（包括關於為履行共同申報準則的主管機關協議的監管機制）。
any present or future contractual or other commitment with local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities or financial intermediaries, or industry bodies or associations of financial services providers that is assumed by or imposed on Hong Kong Life by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or industry bodies or associations and/or the obligations of Hong Kong Life to comply with applicable tax laws including but not limited to the Foreign Account Tax Compliance Act pursuant to the Intergovernmental Agreement between Hong Kong and the United States and the provisions issued by the Organization for Economic Co-operation and Development (including the regulatory scheme relating to its Competent Authority Agreement to implement its Common Reporting Standard).



3. 個人資料的轉移

Transfer of Personal Data

香港人壽或會就上述目的將任何收集或持有之個人資料儲存、使用、透露、發放及/或轉交予（不論在香港或海外）任何從事與保險或再保險業務有關之公司、中介人、第三方便理人、第三方服務供應商（包括但不限於保險公司、銀行、證券、商品及投資公司、消費卡或信用卡發行公司、第三方獎賞、年資獎勵、聯名合作及優惠計劃供應商、香港人壽之聯名合作夥伴、律師、會計師，以及其他提供行政、電訊、電腦、付款、印刷、贖回或其他服務以令香港人壽的業務可以運作的第三方服務供應商）、理賠調查員、醫療賬單審查公司、有關提供保險業務服務之公司、專業顧問、研究人員、政府機構、任何保險業組織或聯會、信貸資料服務機構、收賬代理、伙伴金融機構、任何對香港人壽有保密責任並已承諾作出保密有關資料的其他人士、香港人壽的任何實在或建議的受讓人或就香港人壽對資料當事人的權利的參與人或附屬參與人或承讓人、符合法例或法庭頒令的資料披露規定之單位、或根據監管或其他有關機構所發出的指引而作出披露之單位。

Any personal data collected or held by Hong Kong Life may be stored, used, disclosed, released and/or transferred (whether within or outside Hong Kong) by Hong Kong Life to any other companies carrying on insurance or reinsurance related businesses, intermediaries, third party administrators, third party service providers (including but not limited to insurers, banks, securities, commodities and investment companies, charge or credit card issuing companies, third party rewards, loyalties, co-branding and privileges programme providers, co-branding partners of Hong Kong Life, lawyers, accountants, and other third party service providers who provide administrative, telecommunications, computer, payment, printing, redemption or other services to Hong Kong Life for its business operations), claims investigators, medical bill review companies, other service providers providing services relevant to insurance business, professional advisors, researchers, government authorities, any associations or federations of insurance companies, credit reference agencies, debt collection agencies, partnering financial institutions, any other person under a duty of confidentiality to Hong Kong Life which has undertaken to keep such data confidential, any actual or proposed assignee of Hong Kong Life or participant or sub-participant or transferee of Hong Kong Life's rights in respect of the data subjects, any organizations which meet data disclosure requirements imposed by law or court orders or pursuant to guidelines issued by regulatory or other relevant authorities, for any of the above purposes.

4. 使用個人資料作直接促銷

Use of Personal Data in Direct Marketing

香港人壽擬使用資料當事人的個人資料作直接促銷及須為此目的取得資料當事人的同意（包括不反對之表示）。因此，請注意以下事項：

Hong Kong Life intends to use the data subjects' personal data for direct marketing and requires the consent (which includes an indication of no objection) from data subjects for that purpose. In this connection, please note the following:

- (a) 香港人壽持有資料當事人的姓名、性別、出生日期、身分證或護照號碼一部分、聯絡資料（包括但不限於電話號碼、傳真號碼、電郵地址、通訊地址及住宅地址）、已購買產品及/或服務資料、交易模式及行徑、財務背景及統計資料可不時被香港人壽用作直接促銷；

The name, gender, date of birth, part of identity card or passport number, contact details (including but not limited to phone number, fax number, email address, correspondence address and residential address), information about the purchased products and/or services, transaction pattern and behaviour, financial background and demographic data of data subjects held by Hong Kong Life from time to time may be used by Hong Kong Life in direct marketing;

- (b) 以下種類的產品、服務及類別可作推廣：

The following classes of products, services and subjects may be marketed:

- (i) 財務、保險、信用卡、證券、商品、投資、銀行及相關產品和服務及授信；
financial, insurance, credit card, securities, commodities, investment, banking and related products and services and facilities;
- (ii) 獎賞、年資獎勵或優惠計劃及相關產品和服務；
rewards, loyalties or privileges programmes and related products and services;
- (iii) 香港人壽的聯名合作夥伴提供之產品和服務；及
products and services offered by Hong Kong Life's co-branding partners; and
- (iv) 為慈善及/或非牟利目的之捐款及資助。
donations and contributions for charitable and/or non-profit making purposes.

- (c) 上述產品、服務及類別可由香港人壽及/或下述人士提供或募捐（如涉及捐款及資助）：

The above products, services and subjects may be provided or solicited (in the case of donations and contributions) by Hong Kong Life and/or the following parties:

- (i) 第三方金融機構、保險公司、信用卡公司、證券、商品及投資服務供應商；
third party financial institutions, insurers, credit card companies, securities, commodities and investment services providers;
- (ii) 第三方獎賞、年資獎勵、聯名合作或優惠計劃供應商；
third party rewards, loyalties, co-branding or privileges programme providers;
- (iii) 香港人壽之聯名合作夥伴；及
co-branding partners of Hong Kong Life; and
- (iv) 慈善或非牟利組織。
charitable or non-profit making organizations.



收集個人資料聲明 (續)

Personal Information Collection Statement (Con't)

- (d) 除香港人壽推廣上述產品、服務及類別外，香港人壽同時擬提供列明於上述(a)段之資料至上述(c)段的所有或其中任何人士，該等人士藉以用於推廣上述產品、服務及類別。香港人壽須為此目的取得資料當事人的同意（其中包括不反對之表示）。
In addition to marketing the above products, services and subjects, Hong Kong Life also intends to provide the data described in paragraph (a) above to all or any of the persons described in paragraph (c) above for use by them in marketing those products, services and subjects. Hong Kong Life requires the data subjects' written consent (which includes an indication of no objection) for that purpose.

若資料當事人不希望香港人壽使用或提供其個人資料予其他人士藉以用於以上所述之直接促銷，資料當事人可通知香港人壽以行使不同意此安排的權利。

If the data subject does not wish Hong Kong Life to use or provide to other persons his personal data for use in direct marketing as described above, the data subject may exercise his opt-out right by notifying Hong Kong Life.

5. 查詢及改正資料權利 Data Access and Correction Right

根據條例規定，資料當事人有權知悉香港人壽是否持有他的個人資料及有權查閱該等資料。若認為香港人壽持有有關他的個人資料不準確，資料當事人有權要求更改他的個人資料。而香港人壽或會收取處理有關資料的合理費用。有關要求查閱及更改個人資料，或對以上的個人資料收集聲明有任何疑問，請致電2290 2882或以書面形式致函香港皇后大道中183號中遠大廈15樓，向香港人壽資料保護主任提出。

In accordance with the Ordinance, the data subject has the right to check whether Hong Kong Life holds his personal data and the right of access to such data. If the data subject believes that his personal data held by Hong Kong Life is incorrect, the data subject has the right to request for correction of his personal data. Hong Kong Life may charge a reasonable fee for the processing of such data. Any enquiries regarding request for accessing and correction of personal data or the Personal Information Collection Statement, please call us at 2290 2882 or make a written request to the Corporate Data Protection Officer of Hong Kong Life at 15/F, Cosco Tower, 183 Queen's Road Central, Hong Kong.

香港人壽保留權利可隨時且在無須通知的情況下修訂本個人資料收集聲明。若香港人壽更改個人資料收集聲明，香港人壽會更新網站上的個人資料收集聲明(www.hklife.com.hk)或以書面形式通知。任何有關更改將在刊登後即時生效。

Hong Kong Life reserves the right to amend the Personal Information Collection Statement at any time without any prior notice. If Hong Kong Life changes its Personal Information Collection Statement, Hong Kong Life will either update the Personal Information Collection Statement on its website at www.hklife.com.hk or provide a notification in writing. Should there be any changes to the Personal Information Collection Statement in the future, such changes will become effective upon posting.

聲明及授權

Declaration and Authorization

1. 本人/吾等為保單權益人、受保人及後續受保人在此要求保單按照上述細則更改。本人/吾等明白及同意申請表之副本將附於本保單契約內，且構成保單契約之一部分。本人/吾等確認我們完全知悉，及已同意此申請。
I/We, the Policyowner, Life Insured and Contingent Life Insured(s) request that the Policy be changed according to the above particulars. I/We understand and agree that a copy of this request will be attached to and form part of the Policy. I/We confirm that we are fully aware of, and have consented to this request.

2. 本人/吾等為保單權益人、受保人及後續受保人謹此授權：(1) 任何僱主、醫生、醫院、診所、保險公司、政府部門、其他因香港人壽提供的產品及/或服務之機構/人士，凡曾已或將會知悉或持有本人/吾等之個人資料（不論是醫療或其他資料），均可向香港人壽或其代表透露、發放或轉交該等資料，以作為處理本申請及其後之保單復效和理賠事宜；(2) 香港人壽或任何其指定之醫護人員或化驗所，可就本申請及其後之保單復效和理賠事宜，替本人/吾等進行所需之醫療評估及測試以審核本人/吾等之健康狀況。即使本人/吾等死亡或喪失能力，如法律上可行時，此授權書仍具效力，而本人/吾等之繼承人及承讓人亦會受此授權書約束。本授權書之影印本與正本均有同等效力。

I/We, the Policyowner, Life Insured and Contingent Life Insured(s) hereby authorize: (1) any employer, doctor, hospital, clinic, insurance company, government office or any relevant organization/person in respect of any services and/or products provided by Hong Kong Life who has or may hereafter have any record, knowledge or information of me/us (whether medical or otherwise) to disclose, release or transfer to Hong Kong Life or its representative such record, knowledge or information pertinent to this application and any reinstatement or claim arising therefrom; (2) Hong Kong Life or any of its appointed medical/paramedical examiners or laboratories to perform the necessary medical assessment and tests to evaluate the health status of me/us in relation to this application for insurance and any reinstatement or claim arising therefrom. This authorization shall bind me/us as well as the successors and assignees of me/us and remain valid notwithstanding death or incapacity in so far as legally possible. A photocopy of this authorization shall be valid as the original.

3. 本人/吾等為後續受保人確定本人/吾等已閱讀、明白及同意「個人資料收集聲明」。
I/We, the Contingent Life Insured confirm that I/we have read, understood and agreed to the Personal Information Collection Statement.

本人/吾等為後續受保人同意根據「個人資料收集聲明」，提供本人/吾等的個人資料用作直銷推廣之用途。

I/We, Contingent Life Insured(s) agree to the provision and use of my/our personal data for the direct marketing purposes as set out in the Personal Information Collection Statement."

☐ 若本人/吾等不同意根據「個人資料收集聲明」，提供、使用及/或轉移個人資料用作直銷推廣用途，請在左方空格上填上"✓"號。

Please check the box on the left if I/we do not agree with the provision to provide, use and/or transfer of my/our personal data for direct marketing purposes in accordance with the Personal Information Collection Statement



選項一

Option 1

簽署及簽署日期

Signature and Sign Date



保單權益人簽署
Signature of Policyowner

日 月 年
DD MM YYYY



受保人簽署
Signature of Life Insured

日 月 年
DD MM YYYY



後續受保人(次序一)簽署(年齡為 18 歲或以上)
Signature of Contingent Life Insured (Sequence 1) (Age 18 or above)

日 月 年
DD MM YYYY



後續受保人(次序二)簽署(年齡為 18 歲或以上) (如適用)
Signature of Contingent Life Insured (Sequence 2) (Age 18 or above)(if applicable)

日 月 年
DD MM YYYY



後續受保人(次序三)簽署(年齡為 18 歲或以上) (如適用)
Signature of Contingent Life Insured (Sequence 3) (Age 18 or above)(if applicable)

日 月 年
DD MM YYYY

供保險中介人/見證人/受讓人(如適用)

For Insurance Intermediary/Witness/Assignee (if applicable)



保險中介人姓名及簽署
Name and Signature of Insurance Intermediary

日 月 年
DD MM YYYY



見證人姓名及簽署
Name and Signature of Witness

日 月 年
DD MM YYYY



受讓人簽署
Signature of Assignee

日 月 年
DD MM YYYY



選項二

Option 2

簽署及簽署日期

Signature and Sign Date



保單權益人簽署
Signature of Policyowner

日 月 年
DD MM YYYY



受保人簽署
Signature of Life Insured

日 月 年
DD MM YYYY

指定保單一

Designated Policy 1



後續受保人(次序一)簽署 (年齡為 18 歲或以上) (如適用)
Signature of Contingent Life Insured (Sequence 1) (Age 18 or above) (if applicable)

日 月 年
DD MM YYYY



後續受保人(次序二)簽署 (年齡為 18 歲或以上) (如適用)
Signature of Contingent Life Insured (Sequence 2) (Age 18 or above)(if applicable)

日 月 年
DD MM YYYY



後續受保人(次序三)簽署 (年齡為 18 歲或以上) (如適用)
Signature of Contingent Life Insured (Sequence 3) (Age 18 or above)(if applicable)

日 月 年
DD MM YYYY

指定保單二

Designated Policy 2



後續受保人(次序一)簽署 (年齡為 18 歲或以上) (如適用)
Signature of Contingent Life Insured (Sequence 1) (Age 18 or above) (if applicable)

日 月 年
DD MM YYYY



後續受保人(次序二)簽署 (年齡為 18 歲或以上) (如適用)
Signature of Contingent Life Insured (Sequence 2) (Age 18 or above)(if applicable)

日 月 年
DD MM YYYY






後續受保人(次序三)簽署 (年齡為 18 歲或以上) (如適用)
Signature of Contingent Life Insured (Sequence 3) (Age 18 or above)(if applicable)

日 月 年
DD MM YYYY



指定保單三

Designated Policy 3

			
後續受保人(次序一)簽署 (年齡為 18 歲或以上) (如適用) Signature of Contingent Life Insured (Sequence 1) (Age 18 or above) (if applicable)	日 DD	月 MM	年 YYYY
			
後續受保人(次序二)簽署 (年齡為 18 歲或以上) (如適用) Signature of Contingent Life Insured (Sequence 2) (Age 18 or above)(if applicable)	日 DD	月 MM	年 YYYY
			
後續受保人(次序三)簽署 (年齡為 18 歲或以上) (如適用) Signature of Contingent Life Insured (Sequence 3) (Age 18 or above)(if applicable)	日 DD	月 MM	年 YYYY

供保險中介人/見證人/受讓人(如適用)

For Insurance Intermediary/Witness/Assignee (if applicable)

			
保險中介人姓名及簽署 Name and Signature of Insurance Intermediary	日 DD	月 MM	年 YYYY
			
見證人姓名及簽署 Name and Signature of Witness	日 DD	月 MM	年 YYYY
			
受讓人簽署 Signature of Assignee	日 DD	月 MM	年 YYYY

