



Change of Premium Instruction 更改繳付保費指示

Important Note 重要提示：

- Your request will be processed within approximate 5 working days upon receipt of the form. 本公司將在收到申請表後大約五個工作天內處理您的申請。
- HSBC Life (International) Limited is referred as the "Company" or "HSBC Life" in this document. 滙豐人壽(國際)有限公司在此文件中張被稱為「本公司」或「滙豐保險」。
- To comply with the Foreign Account Tax Compliance Act (FATCA) regulations issued by the United States Department of the Treasury and Internal Revenue Service (IRS), we are required to establish the status of Policyholder and connected person (including entities/companies) that is entitled to access the contract's value or change a beneficiary under the contract. If there is any update in information concerning these parties, you are required to provide the supporting documents. 為符合由美國財政部和國稅局(IRS)發出的海外賬戶稅務合規法案(FATCA)的規定，我們需要向保單持有人及關連人士(包括機構或公司)在保單上有權獲得保險合約的現金價值或更改受益人以作識別及分類。若該等人士有任何資料更新，閣下需按要求提供相關核實證明。
- The payor must be one of the following designated persons or legal person which include the Life Insured, Policyholder, Life Insured's/Policyholder's parent, legal spouse, sibling, children, grandparent and legal guardian, etc. 付款人必須為以下指定人士或法人之一，包括受保人、保單持有人、受保人/保單持有人的父母、合法配偶、兄弟姊妹、子女、祖父母/外祖父母及法定監護人等。

Please log on to your personal internet banking to place your change of premium instruction directly or submit the form and relevant documents using one of the available channels below. 請登入您的網上理財直接更改繳付保費指示或透過以下其中一種方式將表格連同相關文件遞交。

- Scan the QR code on your right hand side to upload documents to "Document Upload Service" on HSBC website 您可以掃描右方的二維碼上載相關文件到滙豐網站上的「文件上載服務」；OR 或
- Mail to 18/F, Tower 1, HSBC Centre, 1 Sham Mong Road, Kowloon, Hong Kong 郵寄至香港九龍深旺道1號滙豐中心1座18樓；OR 或
- Submit to any HSBC Branch 可於任何滙豐分行遞交



Please complete this form in English BLOCK LETTERS and put a ✓ in the appropriate box(es) 請用英文正楷填寫，並在適當方格內加上✓號

Policy Information 保單資料

Policy number 保單號碼	
Name of Policyholder in English 保單持有人英文姓名	

1. Change of Payment Method 更改繳付保費方式[^]

<input type="checkbox"/> Monthly 每月	<input type="checkbox"/> Autopay from bank account* 每月由銀行戶口自動轉賬*	<input type="checkbox"/> Autopay from VISA/Master/JCB credit card** 由信用卡/萬事達卡/JCB 信用卡自動轉賬**
	<input type="checkbox"/> Standing Instruction (Applicable to non HKD currency policy only) 常行指示(只適用於非港元貨幣的保單)	
<input type="checkbox"/> Annual 每年	<input type="checkbox"/> Autopay from bank account* (effective on policy anniversary) 自動轉賬*(於保單周年日生效)	<input type="checkbox"/> Autopay from VISA/Master/JCB credit card** (effective on policy anniversary) 由信用卡/萬事達卡/JCB 信用卡自動轉賬** (於保單周年日生效)
	<input type="checkbox"/> Premium notice (effective on policy anniversary) 郵寄賬單(於保單周年日生效)	<input type="checkbox"/> Standing Instruction (Applicable to non HKD currency policy only) 常行指示(只適用於非港元貨幣的保單)
<input type="checkbox"/> Other 其他	<input type="checkbox"/> Shortfall or Direct Credit Claim Payment 收取索償超出賠償額的欠款或直接存入賠償款項	

* To apply for direct debit, please complete Direct Debit Authorization section below. For direct debit from HSBC Account, premium and levy will be debited from the below-mentioned account in account currency (i.e. HKD or Policy Currency). Premium and levy will be debited in HKD for credit card payment. 申請自動轉賬，請填寫以下之直接付款授權書。當支賬戶口為滙豐戶口時，保費及保費徵費均將於下述戶口以賬戶貨幣(即港幣或保單貨幣)扣除。如選擇以信用卡繳費，將以港幣扣除保費及保費徵費。

Not applicable to Investment Linked Insurance Plan. 不適用於投資相連壽險計劃。

[^] Payment Method varies subject to plans. Please refer to Policy's terms and conditions for details. 繳付保費方式因保險計劃各有不同，詳情請檢閱保單條款及細則。

Note 註：

- If "Standing Instruction" has been set up for premium payment arrangement, please be reminded that you should complete and return the "Standing Instruction Request form" to The Hongkong and Shanghai Banking Corporation Limited for the amendment/cancellation of the said arrangement. Normally, it takes 5 business days to processing such request. 若上述保單已設立「常行指示」以繳付保費，請注意，閣下需填妥並交回「常行指示申請表」予香港上海滙豐銀行有限公司，以修改或取消有關常行指示的安排。有關安排，一般需時5個工作天方可生效。
- If the payments are paid in currencies other than the policy currencies/currency of levy cap i.e. HKD as provided by the Insurance Authority, the payments would be subject to change according to the prevailing exchange rate of policy currencies/HKD to payment currencies to be determined by the Company from time to time. Likewise any payments settled in currencies other than the policy currencies/currency of levy cap i.e. HKD, the payments would be subject to the change according to the prevailing exchange rate of policy currencies/HKD to payment currencies to be determined by the Company from time to time. The fluctuation in exchange rates may have impact on the amount of payments including but not limited to premium payments, levy payments and benefit payments. By choosing the plans denominated in currencies other than local currency, you are subject to the exchange rate risks. Exchange rate fluctuates from time to time. You may suffer a loss of your benefit values and the subsequent premium payments and/or levy payments (if any) may be higher than your initial premium payment as a result of the exchange rate fluctuations. 如繳付款項貨幣有別於保單貨幣或保險業監管局訂定繳費上限的貨幣(即港幣)，該款項可能會受本公司不時釐定的保單貨幣/港幣對繳付款項貨幣的匯率而改變。同樣，如任何款項的貨幣不是以保單貨幣或保險業監管局訂定繳費上限的貨幣(即港幣)支付，該款項將會受本公司不時釐定的保單貨幣對支付貨幣/港幣的匯率而改變。匯率之波動會對款項構成影響，包括但不限於以繳付保費，保費徵費及利益支付款項。選擇非本地貨幣結算的保單，閣下須承受匯率風險。匯率會不時波動，閣下可能因匯率之波動而損失部分的利益價值及繳交往後保費及/或保費徵費(如有)可能會比繳交首次保費及保費徵費金額為高。

2. Change of Direct Debit Account (NOT applicable to Jade Global Generations Universal Life, Jade Ultra Global Generations Universal Life and HSBC Paramount Global Life Insurance Plan) 更改自動轉賬賬戶 (不適用於翡翠環球世代萬用壽險、翡翠尊尚環球世代萬用壽險及滙豐環球壽險計劃)

I/We authorise HSBC Life (International) Limited to initiate deductions from my/our account[^], or to debit my credit card*, as specified below, for the premium and levy due. 本人/我等授權滙豐人壽保險(國際)有限公司在本人/我等的戶口[^]或在本人的信用卡內*, 直接轉賬支付保費及保費徵費。

OR 或	<input type="checkbox"/> Bank Name 銀行名稱 Bank No. 銀行編號 Branch No. 分行編號 Account No. 賬戶號碼 Account Currency [^] 賬戶貨幣 [^] <input type="checkbox"/> HKD 港幣 <input type="checkbox"/> Policy Currency (Applicable to Non-HKD Policy only) 保單貨幣(只適用於非港幣保單)
	For Integrated Account, if the debit is from the HKD Current account, please write the last 3 digits of the bank Account No. with 001. 如支賬戶口為綜合理財戶口內之港幣往來戶口, 請將賬戶號碼最後3個數字寫為001。
<input type="checkbox"/>	Bank Name 銀行名稱 Credit Card No. ** ^o 信用卡號碼 ** ^o Expiry Date 到期日: _____ MM月/YY年

Signature of Account Holder
戶口持有人簽署

Relationship to Policyholder
(if not Policyholder) 與保單
持有人關係(如非保單持有人)

Signature of Joint Account Holder
聯名戶口持有人簽署

⇒ (S.V.)

⇒ (S.V.)

Name in English
英文姓名: _____

Name in English
英文姓名: _____

ID Type & No.
身份證明文件類別及號碼: _____

ID Type & No.
身份證明文件類別及號碼: _____

Date
日期: _____

Date
日期: _____

* Premium and levy will be debited in HKD for credit card payment. 如選擇以信用卡繳費, 將以港幣扣除保費及保費徵費。

Not applicable to Investment Linked Insurance Plan. 不適用於投資相連壽險計劃。

^o UnionPay/American Express Credit Card are not applicable. 銀聯/美國運通信用卡並不適用。

[^] For direct debit from HSBC Account, premium and levy will be debited from the above-mentioned account in account currency (i.e. HKD or Policy Currency). 當支賬戶口為滙豐戶口時, 保費及保費徵費均將於上述戶口以賬戶貨幣(即港幣或保單貨幣)扣除。

3. Change of Premium Payor 更改保費付款人

For Personal Customer Payor (If other than Policyholder or Proposed Insured) 適用於付款人為個人客戶(如與保單持有人或受保人不同)

Personal Details of Payor 付款人的個人資料	Premium Payor 保費付款人	
Surname 姓氏		
Given Name(s) 名字		
Any other known by name (where applicable) 別名(如適用)		
Relationship between the payor and the Policyholder 付款人與保單持有人之關係	Gender 性別	<input type="checkbox"/> Male 男 <input type="checkbox"/> Female 女
HKID Card No. If non-permanent HKID card holder or non-HK resident, please provide Passport No. and issuing country/region 香港身份證號碼。如非持有香港永久居民身份證或非香港居民, 請提供護照號碼、簽發國家/地區	<input type="checkbox"/> HKID Card No. 香港身份證號碼: _____ <input type="checkbox"/> Passport No. 護照號碼: _____	
The following section is mandatory if the annual premium is equal to or greater than USD120,000 per policy 如每張保單繳付之每年保費相等或多於美元 120,000, 必須填寫以下部分		
Date of Birth 出生日期 (DD 日 / MM 月 / YYYY 年)		
Nationality (Country/Region) 1 國籍(國家/地區) 1		
Nationality (Country/Region) 2 (where applicable) 國籍(國家/地區) 2 (如適用)		
Nationality (Country/Region) 3 (where applicable) 國籍(國家/地區) 3 (如適用)		
Residential Address 住宅地址		
Residential Address Country/Region and Postal Code 住宅地址國家/地區及郵區編碼		

* Please submit the following Required Identification Documentation: 請提交以下所需驗證文件:

- Certified copy of HKID Card. For non-permanent HKID cardholders, a certified copy of HKID Card and also Passport showing identification number, photograph and legible signature. For non-HK residents, a certified copy of Passport. Mainland Chinese nationals or residents are also required to provide certified copy of PRC ID/passport/travel permit. 香港身份證核證副本。如香港非永久居民身份證持有人, 請提交香港身份證及顯示證件號碼、持有人照片和清晰簽署的護照核證副本。如非香港居民, 請提交護照核證副本, 如中國籍人士或中國居民, 亦須提交中國居民身份證/護照/通行證核證副本。

For non-Personal Payor[^] 適用於付款人為非個人[^]

Details of Payor 付款人資料	Premium Payor 保費付款人
Company Registered Name 公司註冊名稱	
Trading As Name(s) (if different from the Company Registered Name) 營業名稱 (如與公司註冊名稱不同)	
Company Registered Name in Chinese (if any) 公司中文註冊名稱 (如有)	
Relationship between the payor and the Policyholder 付款人與保單持有人之關係	
Registered Office Address in Country/Region of Incorporation 註冊公司地址 (於註冊國家/地區)	
Registration/Incorporation Document 登記/註冊文件	<input type="checkbox"/> Certification of Incorporation 公司註冊證書 Number 號碼 _____ <input type="checkbox"/> Business Registration Certificate 商業登記證 Number 號碼 _____ <input type="checkbox"/> Other 其他 Number 號碼 _____
Date of Registration 登記日期 (DD 日 / MM 月 / YYYY 年)	
Country/Region of Registration 註冊國家/地區	
Regulated in an Equivalent Country/Region/ Listing in an Exchange 受監管機構監管/在交易所上市	<input type="checkbox"/> Yes 是 <input type="checkbox"/> No 否
Name of Regulator/Exchange (where applicable) 監管機構/交易所名稱 (如適用)	
Nature of Business/Industry 商業/行業性質	
Country/Region where Major Business is Carried out 主要業務所在地	

[^] Please submit the following Required Identification Documentation: 請提交以下所需驗證文件:

- Certified copy of Certificate of Incorporation 公司註冊證書核證副本
- Certified copy of HK Business Registration Certificate (for company not registered in HK, then a certified copy of equivalent business registration document if applicable) 商業登記證核證副本 (或香港以外註冊公司的相應商業登記文件核證副本, 如適用)
- Certified copy of Company Search dated within 6 months on the Policyholder (for company not registered in HK, then certified copy of Certificate of Incumbency dated within 6 months) 六個月內的公司查冊紀錄 (若公司為香港以外註冊公司, 請提交六個月內發出的董事/股東職權證明書核證副本)
- Certified copy of Company Memorandum & Articles of Association 公司組織章程大綱及細則核證副本

■ 4. Suspension/Re-activation of Premium Collection*[#] 暫停/恢復定期保費*[#]

Suspend with effect from (DD/MM/YY) 暫停之生效日期(日/月/年) _____

Re-activate with effect from (DD/MM/YY) 恢復之生效日期(日/月/年) _____

If "Standing Instruction" has been set up for premium payment arrangement, please be reminded that you should complete and return the "Standing Instruction Request form" to The Hongkong and Shanghai Banking Corporation Limited for the amendment/cancellation of the said arrangement. Normally, it takes 5 business days to process such request. 若上述保單已設立「常行指示」以繳付保費, 請注意, 閣下需填妥並交回「常行指示申請表」予香港上海滙豐銀行有限公司, 以修改或取消有關常行指示的安排。有關安排, 一般需時5個工作天方可生效。

Please note that during the suspension of premium collection/premium holiday period, applicable policy charges will continue to be deducted from the cash value balance under your policy as long as the policy is in force. The cash value of your policy may be significantly reduced as a result of the premium suspension/premium holiday. Your policy may automatically lapse if the total cash value of your policy is not sufficient to cover the relevant policy charges. Moreover, your entitlement to bonus(es) (if any) may also be affected. If you suspend the premium collection/take a premium holiday, the cash value accumulated and bonuses (if any) under your policy will be lower than they would otherwise be. You may suffer a substantial loss of your investment as a result. 請注意, 於暫停保費/保費緩繳期期間, 若保單仍然生效, 保單的有關費用會繼續從閣下保單現金價值結餘中扣除。閣下保單的現金價值或會因暫停保費/保費緩繳而大幅減少。若保單的現金價值總額不足支付有關的保單費用, 閣下的保單可能會因而自動失效。此外, 閣下所獲享的花紅/獎賞(如有)會因而受影響。若閣下暫停保費/行使保費緩繳, 閣下的保單所累積的現金價值及花紅/獎賞(如有)可低於原本應有的價值, 最終可能令閣下的投資蒙受重大虧損。

* For WealthInvest Insurance Plan, premium holiday is not allowed during Initial Payment Period. In addition, you will lose your entitlement to the "Guaranteed Coverage" privilege once you have taken premium holiday, and this privilege cannot be resumed even if you resume the premium payment afterwards. Please note that, as a result of losing the "Guaranteed Coverage" privilege, your policy will lapse automatically if the policy cash value is negative and you could lose all your premiums paid and benefits. Please refer to the respective terms of your policy for details. 保費緩繳期不適用於財富投資保險計劃之最初供款期。此外, 閣下會因曾行使保費緩繳期而失去享有「保證保障」權益。即使閣下在其後恢復繳交保費, 「保證保障」權益也不能復效。請注意, 如失去「保證保障」權益, 若閣下的保單現金價值為負數, 保單會自動失效, 而閣下可能會失去全部供款及利益。有關詳情請查閱閣下保單相關條款。

[#] For LifeInvest Protection Plus (Standard Protection/Increasing Protection)/RetireInvest Protection Plus (Standard Protection/Increasing Protection), you may lose your entitlement to the "Guaranteed Coverage" privilege once you have taken premium holiday. Please note that, as a result of losing the "Guaranteed Coverage" privilege, your policy will lapse automatically if the policy cash value is negative and you could lose all your premiums paid and benefits. Please refer to the respective terms of your policy for details. 如保單為投資儲全保(標準保障/遞增保障)/退休儲全保(標準保障/遞增保障), 閣下可能會因曾行使保費緩繳期而失去享有「保證保障」權益。請注意, 如失去「保證保障」權益, 若閣下的保單現金價值為負數, 保單會自動失效, 而閣下可能會失去全部供款及利益。有關詳情請查閱閣下保單相關條款。

Declaration and Authorisation 聲明及授權書

By signing below, I/we confirm the above application and agree that the HSBC Life may use and disclose all personal data about me/us that the HSBC Life currently or subsequently hold for the purposes as set out in the Notice relating to the Personal Data (Privacy) Ordinance (which may otherwise be referred to as 'Personal Information Collection Statement') that HSBC Life has most recently notified me of, and I/we understand I/we can scan the QR code below for review or else I/we can request a copy by visiting local HSBC Branch or through the HSBC Life Service Hotline: (852) 2583 8000. 本人(等)在下方簽署即確認上述申請並同意貴公司可按個人資料(私隱)條例的通知內列出的用途使用及披露貴公司現時或其後持有有關本人(等)的全部個人資料。該條例亦是滙豐人壽保險(國際)有限公司最近通知本人(等)有關「個人資料收集聲明」,本人(等)亦明白「個人資料收集聲明」可以掃描下方的二維碼瀏覽及可向滙豐各分行或致電(852) 2583 8000 索取。

PICS (English)



個人資料收集聲明(中文)

**Signature 簽署**
 Signature of Policyholder
 保單持有人簽署

 Date
 日期
For Bank Use
 Client's ID copy attached

Staff Name and ID:

Servicing Staff IA No.

Branch Code and Chop

 Client's original ID sighted

Contact No.:

Servicing Staff RI No.