



Form of Additions, Amendments or Corrections to an Application for Insurance(A)[^]
補充、修正或刪改保險申請書資料表格 (A)[^]

[^]: This form is applicable to Addition, Amendments or Corrections for Health Related, Travel, Financial and Occupation information in Application for Insurance. It is also applicable to the Amendment on Basic Plan/Rider. 此表格適用於在保險申請書上補充、修正或刪改健康、外遊、財務及職業資料。而此表格也適用於更改保險計劃。

To HSBC Life (International) Limited / The Hongkong and Shanghai Banking Corporation Limited
致：滙豐人壽保險(國際)有限公司／香港上海滙豐銀行有限公司

A. Details of Application for Insurance 保險申請書資料

| | |
|--|---|
| Policy/Serial No. 保單／編號表格： _____ | Name of Policyholder 保單持有人姓名：_____ (Surname first in English) (先填寫姓氏) |
| Date of Insurance Application 保險申請日期： _____ | Name of Proposed Insured (If other than the Policyholder) 受保人姓名(若與保單持有人不同)：_____ (surname first in English) (先填寫姓氏) |
| Plan Name 計劃名稱： _____ | # ID Type and No. : _____ # 身份證明文件類別及號碼：_____ |

NOTE 注意：

- # ID Type 身份證明文件類別：I = HKID 香港身份證，P = Passport 護照，X = Others 其他。
- Please put a '✓' in the appropriate box(es) and complete in BLOCK LETTERS. 請在適當方格內加上✓號，並用正楷填寫。
- Please enclose identification copy in support, if necessary. 請附上身份證明文件副本以作證明(如適用)。

B. Additions, Amendments or Corrections to Application for Insurance 補充、修正或刪改保險申請書

1. I hereby make the following additions, amendments, and corrections as the case may be, to my application for insurance as set out in Section A above.
 本人藉此就A部所述的保險申請書上資料，作出以下的補充、修正或刪改：

| | |
|---|-------|
| <input type="checkbox"/> Health Related 健康資料 | _____ |
| <input type="checkbox"/> Travel Information 外遊資料 | _____ |
| <input type="checkbox"/> Financial Information 財務資料 | _____ |
| <input type="checkbox"/> Occupation 職業資料 | _____ |
| <input type="checkbox"/> Amend on Basic Plan/Rider 更改保險計劃 | _____ |

FOR OFFICE USE ONLY

RBWM USP (for personal customer)

Change of Death Benefit Settlement Option (Applicable to WGIPII/Jade Global Generations Universal Life/Jade Ultra Global Generations Universal Life with application date on or after 1st March 2021 and PGIP only)
更改身故賠償支付選項* (適用於2021年3月1日或之後申請的滙豐保險計劃II/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)

Death Benefit settlement option 身故賠償支付選項^
(Please tick one only 請只選擇一項)

- One lump sum payment 一筆過全數支付*
- 10-year instalment (annual payment) 10年分期支付(每年支付)*
- 20-year instalment (annual payment) 20年分期支付(每年支付)*
- 30-year instalment (annual payment) 30年分期支付(每年支付)*

^ Death Benefit Settlement Option can only be changed while the Life Insured is still alive. 身故賠償支付選項須於受保人在生期間作出更改。

Under this instruction, subject to the terms of the policy, the beneficiary(ies) may receive the Death Benefit in a lump sum payment after the death of the Life Insured. 如選擇此項指示，受保單條款約束的情況下，於受保人身故後，受益人將可獲得一筆過全數支付的身故賠償。

* Under this instruction, subject to the terms of the policy, only the designated surviving (at all time) beneficiary(ies) may receive the Death Benefit according to the above selected option after the death of the Life Insured. However, notwithstanding anything stated in this document, subject to the terms of the policy, all of the Death Benefit will be paid by lump sum after the death of the Life Insured under any of the following circumstances: a) the policy is assigned; b) the policy is without any designated beneficiary. 如選擇此項指示，受保單條款約束的情況下，於受保人身故後，只有於任何時候仍然在生之受益人會根據上述選擇的方案獲得身故賠償。但是，儘管本文件中有任何規定，受保單條款約束的情況下，在下列任何一種情況下，所有身故賠償將於受保人身故後以一筆過全數支付：a) 保單已轉讓；b) 該保單沒有任何指定受益人。

Special note: If premium payor is other than the Policyholder or the Proposed Insured and the annual premium is equal to or greater than USD75,000 per policy, please complete item (5) to (7) of Section B in "Form of Additions, Amendments or Corrections to an Application for Insurance(B)^(where applicable).

請注意：如保費付款人與保單持有人或建議受保人不同及每張保單繳付之每年保費相等或多於美元75,000，請填寫「補充、修正或刪改保險申請書資料表格(B)^(內B部的第5至第7部份(如適用))。

I declare, understand and agree that:

本人聲明、明白並同意：

(i) the declarations and agreements made by me in the application for insurance as described in Section A above shall apply equally to the information supplied in this form; and
本人對A部所述保險申請書上所作出一切聲明及協議，將同樣適用於此表格所載資料；及

(ii) the information provided in this form will be considered as supplemental information for the purpose of processing the insurance application as described in Section A above.
在任何以A部所述保險申請書為申請基礎時，此表格的一切資料會被視為保險申請的補充資料。

I/we agree that if I/we am/are a customer(s) of The Hongkong and Shanghai Banking Corporation Limited (the "Bank"), HSBC Life (International) Limited may share this form with the Bank for the purpose of updating certain of my/our information retained by the relevant business line(s) of the Bank.*

本人(等)同意如本人(等)為香港上海滙豐銀行有限公司(「滙豐」)之客戶，滙豐人壽保險(國際)有限公司可向滙豐提供此表格以更新滙豐之相關業務所儲存有關本人(等)的特定資料。*

* Please note that not all information provided by you in this form will be updated in the Bank's record. If you need to update your correspondence address record maintained with the Bank, please submit request via the following channels:

請注意並非閣下於此表格所提供的全部資料將會被用作更新閣下於滙豐的紀錄。如閣下需要更新在滙豐紀錄的通訊地址，請透過以下途徑提交申請：

(i) Login to HSBC Internet Banking (www.hsbc.com.hk), click "Maintain My Details" at "My HSBC" tab and update your address record by choosing "Change Personal Information and Address" option;
登入滙豐網上理財(www.hsbc.com.hk)，於「我的HSBC」標籤頁點擊「更改我的設定」並選擇「更改個人資料及地址」選項以更新閣下的地址紀錄；

(ii) Call HSBC Phone Banking hotline on (852) 2233 3322 for HSBC Premier customers, (852) 2748 8333 for HSBC Advance customers and (852) 2233 3000 for other personal banking customers; or
致電滙豐電話理財服務熱綫。滙豐卓越理財客戶請致電(852) 2233 3322，滙豐運籌理財客戶請致電(852) 2748 8333，其他個人銀行客戶請致電(852) 2233 3000；或

(iii) Download and complete the "Change of Address/Telephone Number/Fax Number/Email Address Instruction Form (For Personal Customer)" under "Form and Document Download" page at HSBC website (www.hsbc.com.hk).
於滙豐網站(www.hsbc.com.hk)的「表格及文件下載」頁面下載並填寫「更改地址/電話號碼/傳真號碼/電子郵箱地址指示表格(個人客戶)」。

Please also note the following remarks in respect of change of address in the Bank's record.

此外，請注意以下有關更改在滙豐紀錄的通訊地址之注意事項。

(i) In compliance with securities dealing restrictions/relevant laws and/or regulation in the United States of America (US) and Canada (CN), customers changing any of their addresses on the Bank's record to US or CN will not be able to continue to enjoy the Bank's securities and unit trust trading services. In case you have a Margin FX Trading Account, you will be required to close your Margin FX Trading Account and all open positions.

基於美國及加拿大就有關證券交易的管制/有關法例及/或規則，若客戶將其其在滙豐紀錄的任何地址更改為美國或加拿大地址，均不可繼續享用滙豐所提供的任何證券或基金投資服務。如果閣下擁有外匯孖展買賣戶口，閣下需要將所有未平倉盤平倉及取消閣下的外匯孖展買賣戶口。

Please also note that customers (who are South Korean nationals) changing any of their addresses on the Bank's record to South Korea, will not be able to continue to enjoy the Bank's securities and unit trust trading services. In case you have a Margin FX Trading Account, you will be required to close your Margin FX Trading Account and all open positions.

此外，請注意，若客戶將其其在滙豐紀錄的任何地址更改為南韓地址(而客戶同時為南韓公民)，均不可繼續享用滙豐所提供的任何證券或基金投資服務。如果閣下擁有外匯孖展買賣戶口，閣下需要將所有未平倉盤平倉及取消閣下的外匯孖展買賣戶口。

(ii) If you are holding with the Bank an overseas securities account and/or have holdings in treasuries, bonds, bank deposits (including CDs), securities or any other investment products issued by a United States issuer, you are required to separately submit to the Bank a new form W-8BEN (Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding) or such other form as required by the Bank from time to time incorporating your new address and other updated information.

如閣下持有滙豐的海外證券戶口及/或美國國庫債券及/或任何美國發行者發出的債券、銀行存款(包括存款證)、證券或其他投資工具，閣下需要同時遞交一份更新的W-8BEN表格(美國預扣稅實益擁有人外國身分證明書)或按滙豐不時要求遞交的其他表格，在表格上納入新的地址及其他更新資料。

(iii) In compliance with United States' foreign exchange transactions laws, customers changing any of their nationalities or addresses on the Bank's record to US will not be able to apply for certain types of foreign exchange products (for enquiries, please refer to the Bank's branches).

基於美國外匯交易法例的管制，若客戶將其其在滙豐紀錄的國籍更改為美國國籍或任何地址更改為美國地址，均不可申請外匯相關產品(如有查詢，請聯絡滙豐各分行)。

| | | |
|-------------------------------------|--|---------|
| Signature of Proposed Insured 受保人簽名 | Signature of Policyholder (if not Life Insured) 保單持有人簽名(若不是受保人) | Date 日期 |
|-------------------------------------|--|---------|

| | |
|---------------------|----------------------|
| For Bank Use | |
| Staff Name and ID: | Branch Code and Chop |
| Contact No.: | |