



Policy Number* 保單號碼* <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		ePolicy servicing[†] – You can now make online submission via HSBC Personal Internet Banking for transfer of funds (investment choices), change in premium allocation, policy value withdrawal and change of payment, giving you the convenience of 24/7 access for shorter turnaround time. Please visit www.hsbc.com.hk/1/2/hk/insurance for more details. 「網上保單服務 [†] 」—閣下可透過滙豐個人網上理財以更快捷及全天候24小時方式，隨時處理轉調基金(投資選擇)、更改保費分配、提取保單金額及更改繳付保費指示。詳情請瀏覽 www.hsbc.com.hk/1/2/chinese/hk/insurance 。 [†] applicable to some plans only. 只適用於相關保險。	
1 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 2 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 4 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 6 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 7 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 8 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 9 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 0 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Investment-linked products – Application for Statement/Reduction of Regular (Investment) Premium 投資相連產品 – 賬目報告/減低每期定期(投資)保費申請	
Plan Type 計劃名稱			
Name of Policyholder in English (Surname first) 保單持有人英文姓名(姓氏先行)			
ID Type & No. 身份證明文件類別及號碼		Identity Type 證件類別 <input type="checkbox"/> HKID 香港身份證 (I) <input type="checkbox"/> Passport 護照 (P) <input type="checkbox"/> Others 其他 (X) <input type="checkbox"/> Business Registration Certificate 商業登記 (B) Identity No. 證件號碼 _____	

NOTE 注意:

- * Please mark X in the appropriate boxes to indicate the policy number. 請在適當的方格內加上 X 以註明保單號碼。**
- 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 note references to "fund" in this form is equivalent to "Investment Choice" under WealthInvest Insurance Plan/WealthInvest Life Plan. 請注意，此表格所提及「基金」一字等同於財富投資保險計劃/財富投資人壽計劃的「投資選擇」。
- For application for reduction of regular (Investment) premium, the new regular (Investment) premium may be subject to the minimum regular (investment) amount of each plan. Please refer to respective prospectus for details. 就減低每期定期(投資)保費之申請，新每期定期(投資)保費可能須符合個別保單之最低每期定期(投資)保費金額要求。詳情請參閱有關之銷售文件。
- For application for reduction of regular (Investment) premium amount, except for WealthInvest Insurance Plan, the premium allocation will take effect on the next transaction date following the day we receive such request. For WealthInvest Insurance Plan, the premium allocation will take effect on a transaction date as soon as practicable following the day on which we receive the request. 就減低每期定期(投資)保費之申請，除財富投資保險計劃外，保費分配將於本公司接獲申請的下一個交易日生效。至於財富投資保險計劃，保費分配將於本公司接獲申請後的下一個最早而可行的交易日生效。
- 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。
- The Bank has explained the product features to you including potential liquidity, time horizon, any currency implications, fees & charges and ongoing charges related to the product(s) where applicable. 滙豐已向閣下解釋產品特性，包括有關流動性、年期和任何貨幣的潛在影響、收費及產品的經常費用。

<input type="checkbox"/> A. Request for statement 要求賬目報告
<input type="checkbox"/> B. Reduction of Regular (Investment) Premium 減低每期定期(投資)保費
New regular (Investment) premium amount 新定期(投資)保費額: Amount 金額 _____ (in policy currency 以保單貨幣計算) 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。

Personal Information Collection Statement 收集個人資料聲明

Notice relating to the Personal Data (Privacy) Ordinance (the "Ordinance") 關於個人資料(私隱)條例(「該條例」)的通知

HSBC Life (International) Limited ("HSBC") 滙豐人壽保險(國際)有限公司(「滙豐」)

- (a) From time to time, it is necessary for individuals to supply HSBC with data in connection with the provision, continuation and administration of insurance contracts or other financial products and services by HSBC or compliance with any laws, guidelines or requests issued by regulatory or other authorities. 就滙豐的保險合同或其他金融產品及所提供的服務、延續及行政事宜，或因法例規定或監管或其他監管或其他機關所發出的指引或要求，閣下有需要不時向滙豐提供有關的資料。
- (b) Failure to supply such data promptly may result in HSBC being unable to provide or continue to provide products and services. 若未能迅速向滙豐提供該等資料，可能會導致滙豐無法提供或繼續提供產品及服務。
- (c) It is also the case that data are collected from (i) individuals in the ordinary course of the continuation of the relationship, (ii) a person acting on behalf of the individual whose data are provided, and (iii) other sources available to HSBC. Data may also be generated or combined with other information available to HSBC or any member of the HSBC Group ("HSBC Group" means HSBC Holdings plc, its affiliates, subsidiaries, associated entities and any of their branches and offices (together or individually) and "member of the HSBC Group" has the same meaning). 滙豐亦會從以下各方收集資料：(i) 個人與滙豐的日常業務往來的過程中、(ii) 代表個別人士行事的人士提供該個別人士的資料、及(iii) 從其他可供滙豐獲取資料的來源。有關資料亦可能與滙豐或任何滙豐集團成員(「滙豐集團」)(一併及分別地)指滙豐控股有限公司，其附屬公司、子公司、聯營單位及彼等的任何分行及辦事處，而「滙豐集團成員」具有相同涵義)所持有的其他資料一起產生或合併。
- (d) The purposes for which data may be used are as follows: 資料可被用作下列用途：
- (i) considering applications for products and services and offering, providing, maintaining and managing products and services to customers and the operation and administration of the products and services (including without limitation, insurance, provident fund or scheme, credit facilities or other financial products or services) provided to customers which may include, without limitation, underwriting, administration or evaluation of an insurance policy or product; 考慮產品及服務之申請及為客戶推薦、提供、維持及管理產品和服務，以及用於客戶獲提供的產品及服務(包括但不限於保險、公積金或公積金計劃、信貸融通或其他金融產品或服務)的運作及行政，包括但不限於保單或保險產品的承保、行政或評估；
 - (ii) conducting identity, medical or credit checks; 進行身份審查、身體檢查或信用審查；
 - (iii) creating and maintaining the credit and risk related models of HSBC and the HSBC Group; 設立及維持滙豐及滙豐集團的信貸及風險相關準則；
 - (iv) any purposes in connection with any claims made by or against or otherwise involving a customer in respect of any products and/or services provided by HSBC or a member of the HSBC Group including, without limitation, making, defending, analysing, investigating, processing, assessing, determining, responding to, resolving or settling such claims; 與任何由滙豐或滙豐集團成員提供的產品及/或服務相關，而由客戶提出或對客戶作出的索償，或以其他形式涉及客戶的索償有關的任何用途，包括但不限於作出、辯護、分析、調查、處理、評估、釐定、回應、解決該等索償或就該等索償達成和解；
 - (v) designing insurance and other financial products and/or services for customers' use; 設計提供客戶使用的保險及其他金融產品及/或服務；
 - (vi) marketing services, products and other subjects as described in paragraph (f) below; 推廣以下(f)段所述的服務、產品及其他標的；
 - (vii) determining the amount of indebtedness owed to or by a customer and collecting amounts outstanding from a customer and those providing security for customers' obligations; 釐定滙豐對客戶或客戶對滙豐的欠債金額，並向客戶及為客戶債務提供抵押的人士追討欠款；
 - (viii) meeting obligations, requirements or arrangements, whether compulsory or voluntary, of HSBC or any of its branches or any member of the HSBC Group to comply with, or in connection with: 遵守滙豐或其任何分行或任何滙豐集團成員就以下各項負上或有關的責任、要求或安排(不論強制或自願性質)：
 - (1) any law, regulation, judgment, court order, voluntary code, sanctions regime, within or outside the Hong Kong Special Administrative Region ("Hong Kong") existing currently and in the future ("Laws") (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information); 現在及將來於香港特別行政區(「香港」)境內或境外存在的任何法律、法規、判決、法院命令、自願守則、制裁制度(「法律」)(例如《稅務條例》及其條文，包括關於自動交換財務賬戶資料的條文)；
 - (2) any guidelines, guidance or requests given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of financial services providers within or outside Hong Kong existing currently and in the future (e.g. guidelines, guidance or requests given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information) and any international guidance, internal policies or procedures; 現在及將來於香港境內或境外存在的任何法律、監管、政府、稅務、執法或其他機關，或財務服務供應商的自律監管或行業組織或協會所提供或發出的任何指引、指導或要求(例如稅務局所提供或發出的指引、指導或要求，包括關於自動交換財務賬戶資料的指引、指導或要求)，及任何國際指引、內部政策或程序；
 - (3) any present or future contractual or other commitment with local or foreign legal, regulatory, judicial, administrative, public or law enforcement body, or governmental, tax, revenue, monetary, securities or futures exchange, court, central bank or other authorities, or self-regulatory or industry bodies or associations of financial service providers or any of their agents with jurisdiction over all or any part of the HSBC Group (together the "Authorities" and each an "Authority") that is assumed by, imposed on or applicable to HSBC or any of its branches or any member of the HSBC Group; or 滙豐或其任何分行或任何滙豐集團成員承擔的或被施加的或適用於彼等的、與滙豐集團整體或任何部分具有司法權限的本地或外地法律、監管、司法、行政、公營或執法機關，或政府、稅務、納稅、財政、證券或期貨交易所、法院、中央銀行或其他機關，或財務服務供應商的自律監管或行業組織或協會或彼等的任何代理(統稱及各種「機關」)訂立的任何現在或將來的合約承諾或其他承諾；或
 - (4) any agreement or treaty between Authorities; 機關之間的任何協議或條約；
 - (ix) complying with any obligations, requirements, policies, procedures, measures or arrangements for sharing data and information within the HSBC Group and/or any other use of data and information in accordance with any programmes for compliance with sanctions or prevention or detection of money laundering, terrorist financing or other unlawful activities; 遵守滙豐集團內共用資料及資訊的使用而指定的任何責任、要求、政策、程序、措施或安排及/或任何符合制裁或預防或偵測清洗黑錢、恐怖分子融資活動或其他非法活動的任何方案；
 - (x) conducting any action to meet obligations of HSBC or any member of the HSBC Group to comply with Laws or international guidance or regulatory requests relating to or in connection with the detection, investigation and prevention of money laundering, terrorist financing, bribery, corruption, tax evasion, fraud, evasion of economic or trade sanctions and/or any acts or attempts to circumvent or violate any Laws relating to these matters; 採取任何行動以遵守滙豐或任何滙豐集團成員的責任以符合有關偵測、調查及預防清洗黑錢、恐怖分子融資活動、賄賂、貪污、逃稅、欺詐、逃避經濟或貿易制裁及/或規避或違反有關此等事宜的任何法律的任何行為或企圖的法律或國際指引或監管要求；
 - (xi) meeting obligations of HSBC or any member of the HSBC Group to comply with any demand or request from Authorities; 遵守滙豐或任何滙豐集團成員的任何責任，以符合有關機關的任何指令或要求；
 - (xii) exercising any rights HSBC or a member of the HSBC Group may have in connection with the products or services provided to a customer; 行使滙豐或滙豐集團成員與客戶獲提供的產品或服務相關的任何權利；
 - (xiii) matching any data held by HSBC or a member of the HSBC Group relating to a data subject from time to time for any of the purposes listed in this paragraph (d); 不時與滙豐或滙豐集團成員持有與資料當事人相關的任何資料核對，以供作本(d)段列明的任何一項用途；
 - (xiv) enabling an actual or proposed assignee or transferee of HSBC or any member of the HSBC Group, or participant or sub-participant of HSBC's or any member of the HSBC Group companies' rights to evaluate and/or undertake due diligence in relation to the transaction intended to be the subject of the assignment, transfer, participation or sub-participation; and 讓滙豐或任何滙豐集團成員的實際或建議承讓人或受讓人，或滙豐或任何滙豐集團成員公司權利的參與人或附屬參與人對擬議作為轉讓、出讓、參與或附屬參與之交易項目進行評核及/或盡職查證；及
 - (xv) purposes relating thereto. 與上述有關的用途。
- (e) Data held by HSBC or a member of the HSBC Group relating to an individual will be kept confidential but HSBC or a member of the HSBC Group may provide such information to the following parties (whether within or outside Hong Kong) for the purposes set out in paragraph (d): 滙豐或滙豐集團成員持有的個人資料將予以保密，但滙豐或任何滙豐集團成員可就第(d)段列明的用途把該等資料提供予下列各方(不論在香港境內或境外)：
- (i) any agents, contractors, sub-contractors, service providers, reinsurers or associates of the HSBC Group (including their employees, directors, officers, agents, contractors, service providers and professional advisers); 滙豐集團的任何代理人、承包商、次承包商、服務供應商、再保人或聯營人士(包括彼等的僱員、董事、職員、代理人、承包商、服務供應商及專業顧問)；
 - (ii) any third party service provider who provides administrative, telecommunications, computer, payment or securities clearing or other services to HSBC in connection with the operation of its businesses (including their employees, directors and officers); 就滙豐的業務運作向滙豐提供行政、電訊、電腦、付款或證券結算或其他服務的任何第三方服務供應商(包括彼等的僱員、董事及職員)；
 - (iii) any Authorities; 任何機關；
 - (iv) any person under a duty of confidentiality to HSBC including a member of the HSBC Group which has undertaken to keep such information confidential; 任何對滙豐有保密責任的人，包括已承諾對該等資料保密的滙豐集團成員；
 - (v) any person in the context of the sale or transfer by HSBC or any member of the HSBC Group of all or part of its business or portfolio of products, policies or other assets or any proposed or confirmed transaction relating to such a sale or transfer; 由滙豐或任何滙豐集團成員出售或轉讓其全部或部分業務或產品組合、保單或其他資產或任何擬訂或確定的有關該出售或轉讓的交易的人士；
 - (vi) credit reference agencies and, in the event of default, any debt collection agencies; 信貸資料服務機構，並且在客戶欠帳時，可將該等資料提供給任何追討欠款的代理公司；

Personal Information Collection Statement (cont'd) 收集個人資料聲明(續)

- (vii) any person to whom HSBC or any of its branches or any member of the HSBC Group is under an obligation or required or expected to make disclosure for the purposes set out in paragraph (d)(viii), (d)(ix), (d)(x) or (d)(xi); 滙豐或其任何分行或任何滙豐集團成員就第(d)(viii)、(d)(ix)、(d)(x)或(d)(xi)段所載目的而有責任或必須或預定期向其作出披露的任何人士；
- (viii) any actual or proposed assignee or transferee of HSBC or any member of the HSBC Group or participant or sub-participant of HSBC's or any member of the HSBC Group's rights in respect of the data subject; 滙豐或任何滙豐集團成員的任何實際或建議承讓人或受讓人，或就滙豐或任何滙豐集團成員對資料當事人享有的權利的參與人或附屬參與人；
- (ix) (1) any member of the HSBC Group; 任何滙豐集團成員；
(2) third party financial institutions, insurers, credit card companies, securities and investment services providers; 第三方金融機構、保險公司、信用卡公司、證券及投資服務供應商；
(3) third party reward, loyalty, co-branding and privileges programme providers; 第三方獎賞、忠誠、合作品牌及優惠計劃供應商；
(4) co-branding partners of HSBC or any member of the HSBC Group (the names of such co-branding partners will be provided during the application process for the relevant products as the case may be); 滙豐或任何滙豐集團成員的合作品牌夥伴(該等合作品牌夥伴的名稱將會於申請有關產品(視情況而定)時提供)；
(5) charitable or non-profit making organisations; and 慈善或非牟利機構；及
(6) external service providers (including but not limited to mailing houses, telecommunication companies, telemarketing and direct sales agents, call centres, data processing companies and information technology companies) that HSBC engages for the purposes set out in paragraph (d)(vii); 為達至第(d)(vii)段之目的而被滙豐僱用的外部服務供應商(包括但不限於代客寄件公司、電訊公司、電話行銷及直接促銷代理人、電話中心、數據處理公司及資訊科技公司)；
- (x) hospitals, clinics, medical practitioners, laboratories, technicians, loss adjustors, risk intelligence providers, legal advisers or private investigators that may be engaged by HSBC or on behalf of HSBC; 可能被滙豐任用或代表滙豐之醫院、診所、醫生、化驗所、技術員、理賠師、風險情報供應商、法律顧問或私家偵探；
- (xi) any persons acting on behalf of an individual whose data are provided, payment recipients, beneficiaries, account nominees, intermediary, correspondent and agent banks, clearing houses, clearing or settlement systems, market counterparties, upstream withholding agents, swap or trade repositories, stock exchanges, companies in which the customer has an interest in securities (where such securities are held by HSBC) or persons acting on behalf of the customer or the individual whose data is provided for the purposes of receiving benefits under an insurance policy; and 代表其資料被提供的個人行事的任何人士；收款人、受益人、戶口代名人、中介人、往來及代理銀行、結算公司、結算或交收系統、市場交易對手、上游預扣稅代理、掉期或交易儲存庫、證券交易所、客戶擁有證券權益的公司(如果該等證券由滙豐持有)，或代表客戶或其資料被提供以領取保單利益的個人行事之人士；及
- (xii) any party to a transaction or potential transaction acquiring interest in, or assuming or bearing risk in, or in connection with an insurance policy including, without limitation, reinsurers. 交易或潛在交易中收購保單權益或承擔或承受保單的或涉及保單的風險的任何一方，包括但不限於再保險人。

Such information may be transferred to a place outside Hong Kong SAR. 有關資料或被轉移至香港境外。

(f) Use of Data in Direct Marketing 在直接促銷中使用資料

HSBC intends to use personal data in direct marketing and HSBC requires the data subject's consent (which includes an indication of no objection) for that purpose. In this connection, please note that: 滙豐擬把個人資料用於直接促銷，而滙豐為該用途須獲得資料當事人同意(包括表示不反對)。就此，請注意：

- (i) the name, contact details, products and other service portfolio information, transaction pattern and behaviour, financial background and demographic data of a data subject held by HSBC from time to time may be used by HSBC in direct marketing; 滙豐可能把滙豐不時持有資料當事人的姓名、聯絡資料、產品及其他服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷；
- (ii) the following classes of services, products and subjects may be marketed: 可用作促銷下列類別的服務、產品及標的：
(1) financial, insurance, credit card, pensions, banking and related services and products; 財務、保險、信用卡、退休金、銀行及相關服務及產品；
(2) reward, loyalty, privilege or co-branding programmes and related services and products; and 獎賞、忠誠、優惠或合作品牌計劃及相關服務及產品；及
(3) services and products offered by HSBC's co-branding partners (the names of such co-branding partners will be provided during the application of the relevant services and products, as the case may be); and 滙豐合作品牌夥伴提供之服務及產品(該等合作品牌夥伴的名稱將會於申請有關服務及產品(視情況而定)時提供)；及
(4) donations and contributions for charitable and/or non-profit making purposes; 為慈善及/或非牟利用途的捐款及捐贈；
- (iii) the above services, products and subjects may be provided by or (in the case of donations and contributions) solicited by HSBC and/or: 上述服務、產品及促銷標的可能由滙豐及/或下列各方提供或(就捐款及捐贈而言)徵求：
(1) members of the HSBC Group; 滙豐集團成員；
(2) third party financial institutions, insurers, banks, credit card companies, securities and investment services providers; 第三方金融機構、保險公司、銀行、信用卡公司、證券及投資服務供應商；
(3) third party reward, loyalty, privileges or co-branding programme providers; 第三方獎賞、忠誠、優惠或合作品牌計劃供應商；
(4) co-branding partners of HSBC and members of the HSBC Group (the names of such co-branding partners will be provided during the application process of the relevant services and products, as the case may be); and 滙豐及滙豐集團成員的合作品牌夥伴(該等合作品牌夥伴的名稱將會於申請有關服務及產品(視情況而定)時提供)；及
(5) charitable or non-profit making organizations; 慈善或非牟利機構；
- (iv) in addition to marketing the above services, products and subjects itself, HSBC also intends that from time to time it may provide the data described in paragraph (f)(i) above to all or any of the persons described in paragraph (f)(iii) above for use by them in marketing those services, products and subjects, and HSBC requires the data subject's written consent (which includes an indication of no objection) for that purpose; 滙豐除促銷上述服務、產品及標的以外，滙豐亦擬不時將以上(f)(i)段所述的資料提供予以上(f)(iii)段所述的全部或任何人士，以供該等人士在促銷該等服務、產品及標的中使用，而滙豐為此用途須獲得資料當事人書面同意(包括表示不反對)；
- (v) HSBC may receive money or other property in return for providing the data to the other persons described in paragraph (f)(iv) above and, when requesting the data subject's consent or no objection as described in paragraph (f)(iv) above, HSBC will inform the data subject if it will receive any money or other property in return for providing the data to the other persons. 滙豐可能因按以上第(f)(iv)段所述將資料提供予其他人士而獲得金錢或其他財物的回報，而當滙豐徵求資料當事人給予以上第(f)(iv)段所述的同意或不反對表示時，倘若滙豐會因提供資料予其他人士而獲得任何金錢或其他財物回報，其將會告知資料當事人。

If a data subject does not wish HSBC to use or provide to other persons his data for use in direct marketing as described above, the data subject may exercise his opt-out right by notifying HSBC. 資料當事人如不希望滙豐使用其資料或把其資料提供予其他人用於以上所述的直接促銷用途，可通知滙豐以行使其選擇權拒絕促銷。

- (g) Under and in accordance with the terms of the Ordinance and the Code of Practice on Consumer Credit Data approved and issued under the Ordinance, any individual has the right: 根據該條例的條款及該條例核准及發出的個人信貸資料實務守則，任何個人有權：
(i) to check whether HSBC holds data about him and of access to such data; 查核滙豐有否持有其資料及查閱該等資料；
(ii) to require HSBC to correct any data relating to him which is inaccurate; 要求滙豐改正任何有關其不準確的資料；
(iii) to ascertain HSBC's policies and practices in relation to data and to be informed of the kind of personal data held by HSBC; and 查明滙豐對於資料的政策及做法及獲告知滙豐持有的個人資料的種類；及
(iv) in relation to consumer credit, to be informed on request whether any or which items of data are routinely disclosed to credit reference agencies or debt collection agencies, and be provided with further information to enable the making of an access and correction request to the relevant credit reference agency or debt collection agency. 就個人信貸而言，要求獲告知是否有任何或哪些資料會被例行披露予信貸資料服務機構或追討欠款公司，並獲提供進一步資料，藉以向有關信貸資料服務機構或追討欠款公司提出查閱和改正資料的要求。

Personal Information Collection Statement (cont'd) 收集個人資料聲明(續)

- (h) In accordance with the terms of the Ordinance, HSBC has the right to charge a reasonable fee for the processing of any data access request. 根據該條例的條款，滙豐有權就處理任何查閱資料的要求收取合理費用。
- (i) The person to whom requests for access to data or correction of data or for information regarding policies and practices and kinds of data held are to be addressed is as follows:
The Data Protection Officer,
The Hongkong and Shanghai Banking Corporation Limited,
PO Box 72677,
Kowloon Central Post Office,
Hong Kong SAR
Email: dfv.enquiry@hsbc.com.hk
任何關於查閱或改正資料，或索取關於資料政策及做法或所持有的資料種類的要求，應向下列人士提出：
香港九龍中央郵政局郵政信箱 72677 號
香港上海滙豐銀行有限公司
資料保護主任
電郵：dfv.enquiry@hsbc.com.hk
- (j) Nothing in this Notice shall limit the rights of data subjects under the Ordinance. 本通知中的任何條文均無限制資料當事人在該條例下所享有的權利。

Declaration 聲明

1. (For personal customer) I understand that I am advised to (適用於個人客戶)本人明白貴行的建議：
- (i) set aside at least 6 months personal/household expenses as liquid assets for unforeseeable emergency personal or family needs when considering the amount of funds available for achieving my financial goals and consider to diversify my investment and allocate the amount of fund across different products; 當本人考慮投放於理財目標的金額時，應先預留六個月個人/家庭開支金額作流動資產，以應付突如其來的個人或家庭開支，並可考慮分散投資，將金額分配於不同產品上；
- (ii) if I am aged 65 or above, invest into lower risk products with capital protection and less into products where the capital is at risk, maintain a higher proportion of assets in deposit based accounts, and reserve more personal/household expenses as liquid assets for unforeseeable emergency personal or family needs; 如本人是 65 歲或以上，應投資於風險較低的保本產品，減少投資於本金有風險的產品，將資產的較大部分存放在存款戶口，及預留更多個人/家庭開支金額作流動資產，以應付突如其來的個人或家庭開支；
- (iii) If I am non Hong Kong citizen aged 65 or above, take tax advice to maximize the value of my estate; 如本人是 65 歲或以上的非香港公民，應諮詢稅務意見以令遺產價值最大化；
- (iv) if I have or anticipate changes in circumstances impacting time horizon, invest less, invest into lower risk products with capital protection, maintain an accessible source of funds, and maintain a higher proportion of assets in deposit based accounts; 如本人的情況有變化或預計有變化而影響本人的投資年期，應減少投資，投資於風險較低的保本產品，維持充足的可動用的資金，及將資產的較大部分存放在存款戶口；
- (v) if I have limited means or no regular source of income, invest less and maintain a higher proportion of assets in deposit based accounts. 如本人資產有限或沒有固定收入來源，應減少投資，將資產的較大部分存放在存款戶口；
- (vi) if I have recently received unexpected windfall, deposit the money into a flexible savings account whilst I decide on what I want to achieve, and seek advice from trusted family, friends and professionals prior to committing to longer term products and services. 如本人最近收到意外之財，應在決定怎樣利用該筆款項前將款項存入靈活的儲蓄戶口，在投資於較長年期的產品前向信任的家人、朋友或專業人士諮詢。
2. I declare that the Bank has alerted me to consider the investment amount carefully if it exceeds 50% of my total portfolio. 本人聲明，若投資金額佔本人投資組合百分之五十以上，貴行已提示本人考慮投資金額。
3. I understand that I am advised to consider to diversify my investment and allocate the amount of fund across different products. 本人明白貴行的建議，可考慮分散投資，並將金額分配於不同產品上。
4. I understand and accept that explanation on the suitability of fund(s) (Investment Choice(s)) is made by the Bank or any HSBC Group company solely based on information including, without limitation, risk appetite, financial situation, investment experience and objectives provided by me, and that the suitability of fund(s) (Investment Choice(s)) will be adversely affected if any such information provided by me is inaccurate, misleading or incomplete for which neither the Bank nor such HSBC Group company assumes any responsibility. 本人明白及接受滙豐或任何滙豐集團公司在解釋基金(投資選擇)是否適合投資時僅依據本人所提供的資料(包括但不限於風險偏好、財務狀況、投資經驗及投資目標)；以及倘本人提供的任何該等資料有誤、存在誤導或不全時，將會對基金(投資選擇)是否適合本人投資的判斷帶來不利影響，而滙豐或相干滙豐集團公司對此概不承擔責任。
5. I understand that the Bank or any HSBC Group company is not making, and has not made, any representation whatsoever as to the fund(s) (Investment Choice(s)); and I confirm that I have not only relied on views or advice or explanation of the Bank, or any other HSBC Group company in assessing the merits, risks and suitability of the fund(s) (Investment Choice(s)). 本人明白滙豐或相干滙豐集團公司對本基金(投資選擇)並無作出且不曾作出任何陳述；本人確認，在評估本基金(投資選擇)的投資價值、風險及是否適合投資時，本人並不只依賴滙豐或任何其他滙豐集團公司的觀點、意見或解釋。
6. I understand that the fund (Investment Choice) factsheet(s) is/are not intended to provide, and must not be relied upon for, tax, legal or accounting advice, a credit or other evaluation of the fund(s) (Investment Choice(s)) nor as assurance or guarantee as to the expected return (if any) of the fund(s) (Investment Choice(s)); I should consult my own tax, legal, accounting, investment, financial and/or other advisors. 本人明白基金(投資選擇)資料概覽不擬提供稅務、法律或會計意見，或本基金(投資選擇)的信譽或其他評估，亦非對本基金(投資選擇)預期回報(如有)的保證或擔保，本人不可依賴基金(投資選擇)資料概覽作上述用途；本人應諮詢本人的稅務、法律、會計、投資、財務及/或其他顧問。
7. I understand and accept that any decision to apply for the fund(s) (Investment Choice(s)) shall be based on my own judgment and that I have relied upon information independently obtained by myself and not only on any advice or information provided by the Bank or any HSBC Group company. 本人明白及接受本人乃根據自身的判斷作出有關申請本基金(投資選擇)的任何決定；明白及接受本人除了依賴滙豐或任何滙豐集團公司提供的任何意見、解釋或資料之外，還依賴本人獨立獲得的資料。
8. By signing below, I/we agree that the Company may use and disclose all personal data about me/us that the Company currently or subsequently hold for the purposes as set out in the Notice relating to Personal Data (Privacy) Ordinance which accompanies this form. 本人(等)在下方簽署即同意貴公司可按本表格隨附的關於個人資料(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。

 Policyholder's signature
保單持有人簽署

_____ Date 日期

Importance Note: Please return the original of this form, duly completed and signed, to HSBC Life (International) Limited of 18/F, Tower 1, HSBC Centre, 1 Sham Mong Road, Kowloon, Hong Kong. Please note that we will only process your request upon actual receipt of this "original form."
重要事項：請填妥及簽署此申請表(表格)“正本”後並寄回滙豐人壽保險(國際)有限公司，地址：香港九龍深旺道一號滙豐中心一座十八樓，當收到此申請表(表格)“正本”，我們方會辦理閣下之申請。

For Bank Use Only

<input type="checkbox"/> Client's ID copy attached	Staff name	Staff ID no.	Contact no.
<input type="checkbox"/> Client's original ID sighted			
<input type="checkbox"/> Form copy provided to customer	Servicing staff RI no.	Servicing staff IA no.	Branch code and chop