



HSBCBIL

Policy Number 保單號碼

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PICS 2020Jun

## Change of Premium Instruction 更改繳付保費指示

Name of Policyholder in English 保單持有人英文姓名	
NOTE 注意： <ol style="list-style-type: none"> <li>1. 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。</li> <li>2. 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)。</li> <li>3. 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 including but not limited to premium payments, levy payments and benefit payments. By choosing the plans denominated in currencies other than local exchange rate, 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徵費上限的貨幣(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徵費上限的貨幣(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。匯率之波動會對款額構成影響，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在後保費及/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。</li> <li>4. 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，閣下需按的要求提供相關核實證明。</li> <li>5. 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 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/保單持有人之父母、合法配偶、兄弟姊妹、子女及法定監護人等。</li> </ol>	
<input type="checkbox"/> <b>1. Change of Payment Method 更改繳付保費方式</b> <sup>^</sup> <ul style="list-style-type: none"> <li><input type="checkbox"/> Monthly autopay from bank account* 每月由銀行戶口自動轉賬*</li> <li><input type="checkbox"/> Monthly autopay from HSBC VISA/Master credit card** 每月由滙豐信用卡自動轉賬**</li> <li><input type="checkbox"/> Annual autopay from bank account* (effective on policy anniversary) 每年自動轉賬*(於保單周年日生效)</li> <li><input type="checkbox"/> Annual autopay from HSBC VISA/Master credit card** (effective on policy anniversary) 每年由滙豐信用卡自動轉賬**(於保單周年日生效)</li> <li><input type="checkbox"/> Annual premium notice (effective on policy anniversary) 每年郵寄賬單(於保單周年日生效)</li> <li><input type="checkbox"/> Annual Standing Instruction (Applicable to non HKD currency policy only) 每年常行指示(只適用於非港元貨幣的保單)</li> <li><input type="checkbox"/> Monthly Standing Instruction (Applicable to non HKD currency policy only) 每月常行指示(只適用於非港元貨幣的保單)</li> <li><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</li> </ul> <p>* 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 HSBC 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。如選擇以滙豐信用卡繳費，將以港幣扣除保費及保費徵費。</p> <p># <b>Not applicable to Investment Linked Insurance Plan. 不適用於投資連壽險計劃。</b></p> <p><sup>^</sup> 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。</p> <p>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。</p>	

2. **Change of Direct Debit Account 更改自動轉賬賬戶**

I/We authorise HSBC Life (International) Limited to initiate deductions from my/our account<sup>^</sup>, or to debit my/our HSBC credit card account\*, 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<sup>^</sup>或在本人/我等的滙豐信用卡戶口內\*，直接轉賬支付保費及保費徵費。

OR 或	<input type="checkbox"/> Bank Name and Branch 銀行及分行之名稱	Bank No. 銀行編號	Branch No. 分行編號	Account No. 賬戶號碼	Account Currency <sup>^</sup> 賬戶貨幣 <sup>^</sup>
	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"/> 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)
<input type="checkbox"/>	HSBC Credit Card Account No. *# <sup>o</sup> 滙豐信用卡號碼 *# <sup>o</sup>		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 HSBC credit card payment. 如選擇以滙豐信用卡繳費，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。

<sup>o</sup> HSBC Union pay Dual Currency Credit card is not applicable. 滙豐銀聯雙幣信用卡並不適用。

<sup>^</sup> 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 and Employment Details of Payor 付款人的個人及職業資料	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	
HKID Card No. If non-permanent HKID card holder or non-HK resident, please provide Passport No. and issuing country/region with entry proof 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/地區及入境證明	
Gender 性別	<input type="radio"/> Male 男 <input type="radio"/> Female 女
<b>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</b>	
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 with entry proof to HK on the date of signing initial Application Form. 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。如非香港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及與投保申請表簽署日期有關之入境證明，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<sup>^</sup> 適用於付款人為非個人<sup>^</sup>**

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的關係	
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	Certification of Incorporation 公司註冊證書 Number 號碼 _____  Business Registration Certificate 商業登記證 Number 號碼 _____  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="radio"/> Yes 是 <input type="radio"/> 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	

<sup>^</sup> 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。

INH-K102R4 (1/22)ZW

# Data Privacy Notice

Notice relating to the Personal Data (Privacy) Ordinance

We protect your privacy. Read this notice to find out how we collect, store, use and share your personal data.

## 1

### HOW WE COLLECT AND STORE YOUR DATA

#### We collect your data

- when you interact with us, apply for and use our products and services
- visit our websites (please see the "Privacy and Security" section of [www.hsbc.com.hk](http://www.hsbc.com.hk) and refer to "Use of cookies policy" for details of how we use cookies)
- from other people and companies, including other HSBC group companies

We may store your data locally or overseas, including in the cloud. We apply our global data standards and policies wherever your data is stored.

We're responsible for keeping your data safe in compliance with Hong Kong law.

## 2

### WHAT WE USE YOUR DATA FOR

#### We use your data

- to send you direct marketing if you've consented to it
- to consider applications for, offer, provide and manage products and services

*For example: (i) insurance, annuities, pensions and health and wellness products and services; (ii) educational materials; (iii) products and services relating to campaigns and promotions which you have signed up to*

- to design and improve our products, services and marketing
- to help us and other HSBC group companies comply with laws, regulations and requirements, including our internal policies, in or outside Hong Kong
- to detect, investigate and prevent financial crimes
- for the other purposes set out in section B

## 3

### WHO WE SHARE YOUR DATA WITH

#### We share your data with

- other HSBC group companies
- third parties who help us to provide services to you or who act for us
- third parties who you consent to us sharing your data with
- local or overseas law enforcement agencies, industry bodies, regulators or authorities
- the other third parties set out in section C

We may share your data locally or overseas.

#### You can access your data

You can request access to the data we store about you. We may charge a fee for this.

You can also ask us to

- correct or update your data
- explain our data policies and practices

#### You control your marketing preferences

You control whether you receive marketing from us.

You can change this at any time by contacting us.

#### You can contact us

[dfv.enquiry@hsbc.com.hk](mailto:dfv.enquiry@hsbc.com.hk)

The Data Protection Officer

HSBC, PO Box 72677,

Kowloon Central Post Office,

Hong Kong

## A

### Collect and store

#### We may collect

- biometric, medical and health/lifestyle data such as your heart rate, BMI and steps count
- your geographic data and location data based on your mobile or other electronic device
- data from people who act for you or who you deal with through our services
- data from public sources, aggregators and other sources available to us
- data from policyholders or members of our insurance policies of which you benefit from or are insured by

If you don't give us data then we may be unable to provide products or services.

We may also generate data about you

- by combining information that we and other HSBC group companies have collected about you
- based on the analysis of your interactions with us and information which we have collected about you
- through the use of cookies and similar technology when you access our website or apps

## B

### Use

#### We use your data to

- handle and take care of claims
- help us to comply with requirements or requests that we or the HSBC group have or receive such as legal or regulatory in or outside Hong Kong. Sometimes we may have to comply and other times we may choose to voluntarily comply
- conduct identity, medical or credit checks
- create and maintain the credit and risk related models of the HSBC group (such as underwriting models, health and wellness models and models/algorithms for data analytics and artificial intelligence)
- manage our business, including exercising our legal rights
- determine, pay or collect money owed to you or to us
- match data held by HSBC group companies for purposes listed in this notice
- provide personalised advertising to you on third party websites (this may involve us aggregating your data with data of others)
- other uses relating to the above or to which you have consented

#### If you provide data about others

If you provide data to us about another person, you should tell that person how we will collect, use and share their data as explained in this notice.

## C

### Share

#### We share your data with

- local or overseas bodies or authorities such as legal, regulatory, law enforcement, government and tax and any partnerships between law enforcement and the financial sector
- any person who is a party to a transaction (or a potential transaction) buying interest or assuming risk in an insurance policy, such as reinsurers
- payment recipients, beneficiaries or any person who act for our customer or you, or anyone whose data is provided for receiving benefits under an insurance policy or otherwise
- hospitals, clinics, medical practitioners, laboratories, technicians, loss adjustors, risk intelligence providers, legal advisers or private investigators who act for us
- any third party who we may transfer our business, policies or assets to so it can evaluate our business and use your data after any transfer
- partners and providers of reward, co-branding or loyalty programs, charities or non-profit organisations
- social media advertising partners (who can check if you have or use our products and services and send our adverts to you and advertise to people who have a similar profile to you)

We may share your anonymised data with other parties not listed above. If we do this you won't be identifiable from this data.

## D

### Direct Marketing

This is when we use your data to send you details about financial, insurance, pensions, annuities or related products, services and offers (such as health and wellness) and promotional campaigns provided or hosted by us or our co-branding, rewards or loyalty programme partners, charities or other third party financial institutions and service providers.

We may use data such as your demographics, the products and services that you're interested in, transaction behaviour, portfolio information, location data, social media data, analytics, health and wellness data and information from third parties when we market to you.

**We don't give your data to others for them to market their products and services to you.** If we ever wanted to do this, we'd get your separate consent.

This notice will apply for as long as we store your data. We'll send you the latest version at least once a year. If we use your data for a new purpose, we'll get your consent.

Note: In case of discrepancies between the English and Chinese versions, the English version shall apply and prevail.

# 資料私隱通知

關於個人資料(私隱)條例的通知

我們致力保護您的私隱。請閱讀此通知，了解我們如何收集、儲存、使用及披露您的個人資料。

## 1

### 我們如何收集及儲存您的資料

#### 我們收集您資料的途徑包括

- 您與我們互動，向我們申請及使用我們的產品和服務
- 您瀏覽我們網站(有關我們如何使用「cookies」的詳情，請參閱我們網站 [www.hsbc.com.hk](http://www.hsbc.com.hk) 進入「私隱與保安」閱覽「Use of cookies 政策」)
- 其他人士及公司(包括其他滙豐集團旗下公司)

我們可能將您的資料儲存於本地或海外，包括雲端。無論您的資料儲存於何處，均受我們的環球資料標準及政策約束。

我們有責任根據香港法律保護您的資料安全。

## 2

### 我們如何使用您的資料

#### 我們將您的資料用於

- 經您同意後向您發送直接促銷資料
- 考慮申請、為您推薦、提供及管理產品與服務  
*例如：(i) 保險、年金、退休金、健康與保健產品及服務；(ii) 教育材料；(iii) 關於您已報名參與之活動及推廣的產品與服務*
- 設計及改進我們的產品、服務及市場推廣活動
- 幫助我們及其他滙豐集團旗下公司遵守香港或其以外的國家或地區的法律、法規和要求，包括我們的內部政策
- 偵測、調查及預防金融罪案
- B 部分所列的其他目的

## 3

### 我們與誰披露您的資料

#### 我們與下列人士披露您的資料

- 其他滙豐集團旗下公司
- 幫助我們向您提供服務或代表我們行事的第三方
- 您同意我們與之披露您資料的第三方
- 本地或海外執法機構、行業組織、監管機構或權力機關
- C 部分所列的其他第三方

我們可能在本地或海外披露您的資料。

### 您可查閱自己的資料

您可要求查閱我們所儲存有關您的資料。我們可能就此向您收取費用。

您可要求我們

- 改正或更新您的資料
- 說明我們的資料政策及慣例

### 您可控制自己的市場推廣偏好

您可控制您會否從我們收取市場推廣資料。

您可隨時聯絡我們對此作出更改。

### 您可聯絡我們

[dfv.enquiry@hsbc.com.hk](mailto:dfv.enquiry@hsbc.com.hk)

資料保護主任

香港上海滙豐銀行有限公司

香港九龍中央郵政局

郵政信箱 72677 號

## A

### 收集及儲存

#### 我們或會

- 收集生物辨識、醫療及健康/生活模式資料，例如您的心跳率、身高體重指數及步數統計
- 基於您的流動或其他電子裝置收集您的地域及位置資料
- 從代表您的人士或您透過我們服務與之往來的人士收集資料
- 從公開渠道、資料整合機構及其他我們接觸得到的渠道收集資料
- 從您受益或受保於我們的保險下的保單持有人或保單成員收集資料

若您不向我們提供資料，我們可能無法提供產品或服務。

我們亦可能透過以下途徑衍生有關您的資料

- 整合我們及其他滙豐集團旗下公司收集的有關您的資料
- 分析您與我們的互動及我們已收集得來有關您的資料
- 於您瀏覽我們網站或應用程式時使用 cookies 或類似技術

## B

### 使用

#### 我們將您的資料用於

- 處理及安排索償
- 幫助我們遵守包括香港或其以外的地區或國家的法律或監管機構對我們或滙豐集團現有或所收到的相關監管規定或要求。這些監管規定或要求可能是我們必須遵從或選擇自願遵從的
- 進行身份審查、身體檢查或信用審查
- 設立及維持滙豐集團的信貸及風險相關準則(例如承保準則、健康及保健準則，以及用於資料分析及人工智能的準則/算法)
- 管理我們業務，包括行使我們的法律權利
- 釐定、支付或收取欠您或欠我們的款項
- 與滙豐集團旗下公司所持有的資料核對，以供作本通知所列明的用途
- 於第三方網站上為您提供個人化廣告(這可能涉及我們將您與他人的資料進行整合)
- 與上述用途相關或經您同意的其他用途

#### 若您提供他人的資料

若您向我們提供有關其他人士的資料，您應按本通知所述，告知該人士我們將如何收集、使用和披露其資料。

## C

### 披露

#### 我們與下列人士披露您的資料

- 本地或海外的法律、監管、執法、政府和稅務等機構或權力機關，以及執法機構與金融業界之間的任何合作夥伴
- 交易(或潛在交易)下收購保單權益或承擔保單風險的一方，例如再承保人
- 收款人、受益人或任何為我們的客戶或您行事的人；或任何為收取保單賠償或為其他目的而資料被提供的人
- 代表或為我們提供服務的醫院、診所、醫生、化驗所、技術員、理賠員、風險情報提供機構、法律顧問或私家偵探
- 我們可能轉讓業務、保單或資產的任何第三方，以便其評估我們的業務及在轉讓後使用您的資料
- 獎賞、合作品牌或忠誠計劃的合作夥伴及供應商，以及慈善或非牟利機構
- 社交媒體廣告合作夥伴(可查看您是否擁有或使用我們的產品及服務，並向您及與您個人資料相似的人士發送我們的廣告)

我們可能與上文並未列出的其他人士披露您的匿名資料。在此情況下，有關資料將無法識別出您的身分。

## D

### 直接促銷

指我們使用您的資料向您發送由我們或我們的合作品牌、獎賞或忠誠計劃合作夥伴、慈善機構或其他第三方金融機構及服務供應商所提供或舉辦的金融、保險、退休金、年金或相關產品、服務和優惠詳情(例如健康與保健)及推廣活動的詳細資料。

向您進行市場推廣時，我們或會使用您的資料，例如人口統計資料、您感興趣的產品及服務、交易行為、投資組合資料、位置資料、社交媒體資料、分析、健康及保健資料和來自第三方的資料。

**我們不會向他人提供您的資料，以供其向您推廣產品及服務。**如有此意，我們會另行徵求您的同意。

本通知於我們儲存您的資料期間適用。我們亦會每年向您提供此通知的最新版本。若我們將您的資料用於新用途，則會徵求您的同意。

注意：中英文本如有歧義，概以英文本為準。



Signature of Policyholder 保單持有人簽署  	Date 日期
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Important 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"，我們將盡快辦理閣下之申請。

<b>For Bank Use</b>			
<input type="checkbox"/> Client's ID copy attached	Staff Name and ID:	Servicing Staff IA No.	Branch Code and Chop
<input type="checkbox"/> Client's original ID sighted	Contact No.:	Servicing Staff RI No.	