



PICS 2020Jun

<p>Policy Number* 保單號碼*</p> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:30px; height:30px;"></td><td style="width:30px; height:30px;"></td><td style="width:30px; height:30px;"></td><td style="width:30px; height:30px;"></td><td style="width:30px; height:30px;"></td><td style="width:30px; height:30px;"></td><td style="width:30px; height:30px;"></td><td style="width:30px; height:30px;"></td><td style="width:30px; height:30px;"></td><td style="width:30px; height:30px;"></td><td style="width:30px; height:30px;"></td><td style="width:30px; height:30px;"></td> </tr> <tr> <td>1</td><td><input type="checkbox"/></td><td>1</td><td><input type="checkbox"/></td><td>1</td><td><input type="checkbox"/></td><td>1</td><td><input type="checkbox"/></td><td>1</td><td><input type="checkbox"/></td><td>1</td><td><input type="checkbox"/></td> </tr> <tr> <td>2</td><td><input type="checkbox"/></td><td>2</td><td><input type="checkbox"/></td><td>2</td><td><input 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type="checkbox"/>	<p><b>ePolicy servicing<sup>†</sup></b> – 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 <a href="http://www.hsbc.com.hk/1/2/hk/insurance">www.hsbc.com.hk/1/2/hk/insurance</a> for more details. 「網上保單服務<sup>†</sup>」一閣下可透過滙豐個人網上理財以更快及全天候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<a href="http://www.hsbc.com.hk/1/2/chinese/hk/insurance">www.hsbc.com.hk/1/2/chinese/hk/insurance</a>。  <sup>†</sup> applicable to some plans only. 只適用於相關保險。</p> <p style="text-align: center;"><b>Request for Policy Change – Non Financial</b> <b>更改保單申請表 — 非財務</b></p> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%; padding: 5px;">                 Plan Name 計劃名稱             </td> <td style="width:50%;"></td> </tr> <tr> <td style="padding: 5px;">                 Name of Policyholder (Surname first) 保單持有人姓名(先填寫姓氏)             </td> <td></td> </tr> <tr> <td style="padding: 5px;">                 ## ID Type &amp; No. ## 身份證明文件類別及號碼             </td> <td></td> </tr> </table> <p><b>NOTE 注意：</b></p> <ol style="list-style-type: none"> <li><b>* Please mark X in the appropriate boxes to indicate the policy number.</b> 請在適當的方格內加上 X 以註明保單號碼。</li> <li><b>## ID Type</b> 身份證明文件類別：I = HKID 香港身份證，P = Passport 護照，B = Business Registration Certificate 商業登記，X = Others 其他。</li> <li><b>Please put a '✓' in the appropriate box(es) and complete in BLOCK LETTERS.</b> 請在適當方格內加上✓號，並用正楷填寫。</li> <li><b>Please enclose Identification copy in support, if necessary.</b> 請附上身份證明文件副本以作證明(如適用)。</li> <li>LSP: Lifestyle Protection Plus (樂全保)；SPP: Savings Protection Plus (儲全保)；SPL: Super Life (卓滙投資壽險計劃)；LIVP: LifeInvest Protection Plus (投資儲全保)；RIVP: RetireInvest Protection Plus (退休儲全保)；IPP: Integrated Protection Plus (滙全保)；SSPP: Salary Savings Protection Plan (樂綢繆多保計劃)；LBP: LifeBond Plus (富全保)；ESA/E3A: LifeSave Protection Plus (豐全保)；REPP: RetireEnrich Protection Plus (聚全保)；SEPP: SaveEnrich Protection Plus (富全保)；WIIP: WealthInvest Insurance Plan (財富投資保險計劃)；RIAP: RetireIncome Annuity Plan (退休收入年金計劃)；WIPP: WealthInvest Life Plan (財富投資人壽計劃)；WSRP: WealthSave (Renminbi) Insurance Plan (財富儲蓄(人民幣)保險計劃)；WSRB: WealthSave (Renminbi) Insurance Plan II (財富儲蓄(人民幣)保險計劃II)；WSRC: HSBC WealthSave (RMB) Insurance Plan III (滙豐財富儲蓄(人民幣)保險計劃III)；ULPP: Goal Access Universal Life Plan (Protection) (駿富保障萬用壽險計劃)；ULEP: Goal Access Universal Life Plan (Education) (駿富教育萬用壽險計劃)；WGIP: HSBC Wealth Goal Insurance Plan (滙豐保險計劃)；WGIP2: HSBC Wealth Goal Insurance Plan II (滙豐保險計劃II)；FGIP: HSBC Family Goal Insurance Plan (滙豐人生保險計劃)；HGIP: HSBC Health Goal Insurance Plan (滙豐健康保險計劃)。</li> <li>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費率上限的貨幣(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費率上限的貨幣(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。</li> <li>The Bank has explained the product features to you including potential liquidity, time horizon, any currency implications, fees &amp; 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。</li> <li>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，閣下需按需要提供相關核實證明。</li> <li>For trust owned policy or policy that is ultimately owned by a trust, is there any change in directorship, beneficial owner or authorised signatory of the trust since the policy was issued? If Yes, please complete the Verification of Trust Form and provide the documents specified in the form. 如信託作為保單持有人或唯最終擁有人，倘若在保單發出後公司董事、實益擁有人或信託的獲授權簽署人是否有任何更改？如有，請填寫信託核實表格及提供其註明的相關證明文件。</li> <li>(For corporate customer) Is there any change in directorship, beneficial owner or authorised signatory of the company since the policy was issued? If Yes, please complete the "Corporate Authorisation Form" (適用於公司客戶)貴公司由保單生效至今，公司之董事、最終實益擁有人、及/或負責人是否有轉變？如有，請填寫「公司授權表格」。</li> <li>With effect from 1 July 2017, the following insurance terminology shown on this form shall be updated for the purpose of reading the policy provisions and other documents related to your policy. Please note that the change will not impact the original meanings and definitions of the insurance terminology for your policy concerned. For details, please visit <a href="https://www.personal.hsbc.com.hk/1/2/hk/insurance/info">https://www.personal.hsbc.com.hk/1/2/hk/insurance/info</a>. 由2017年7月1日起，此表格上所顯示之下列保險詞彙將會更改以便閣下閱讀保單條款及其他和閣下的保單相關的文件。請注意，該變更不會影響閣下的保單相關保險詞彙的含義及定義，詳情請登入 <a href="https://www.personal.hsbc.com.hk/1/2/chinese/hk/insurance/info">https://www.personal.hsbc.com.hk/1/2/chinese/hk/insurance/info</a>。</li> </ol> <table border="1" style="width:100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width:50%; text-align: center;">Terminology currently used (if applicable) 現用詞彙(如適用)</th> <th style="width:50%; text-align: center;">New terminology (with effect from 1 July 2017) 新詞彙(由2017年7月1日起生效)</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Terminal Bonus</td> <td style="text-align: center;">Special Bonus</td> </tr> <tr> <td style="text-align: center;">期末獎賞</td> <td style="text-align: center;">特別獎賞</td> </tr> </tbody> </table>	Plan Name 計劃名稱		Name of Policyholder (Surname first) 保單持有人姓名(先填寫姓氏)		## ID Type & No. ## 身份證明文件類別及號碼		Terminology currently used (if applicable) 現用詞彙(如適用)	New terminology (with effect from 1 July 2017) 新詞彙(由2017年7月1日起生效)	Terminal Bonus	Special Bonus	期末獎賞	特別獎賞
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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

1. Change or correction of personal details (Please enclose ID Card/Passport/Birth Certificate copy in support)  
更改或更正客戶資料(請附上身份證/護照/出生證明副本以作證明)

(a) Insured 受保人       (b) Policyholder 保單持有人       (c) Sole Proprietor<sup>o</sup> 獨資經營公司持有人資料<sup>o</sup>       (d) Payor 付款人

Name 姓名 \_\_\_\_\_

Former Name/Alias (Surname first) (where applicable)<sup>^</sup> 前用姓名/別名(先填寫姓氏)(如適用)<sup>^</sup> \_\_\_\_\_

## ID Type & No. 身份證明文件類別及號碼 \_\_\_\_\_

I would like to apply the change or correction of ## ID Type & No. to my following life insurance policy(ies) underwritten by HSBC Life (International) Limited 本人擬申請更改或更正本人由滙豐人壽保險(國際)有限公司承保之人壽保險保單之身份證明文件類別及號碼：

All my life insurance policy(ies) underwritten by HSBC Life (International) Limited 所有本人由滙豐人壽保險(國際)有限公司承保之人壽保險保單

This life insurance policy and my other life insurance policy(ies) underwritten by HSBC Life (International) Limited. Please specify the policy number(s) here 此人壽保險保單及本人其他由滙豐人壽保險(國際)有限公司承保之人壽保險保單，請在此列出有關的保單號碼：

\_\_\_\_\_

*Note 註：Please choose your change request option by inserting tick '✓' in the applicable box above. If no option is chosen, this change will be applied to this life insurance policy only. 請在以上適用的空格內劃上✓號選擇所需的更改類別。如未選擇，此更改將只限此人壽保險保單。*

GIIN No. (where applicable) 全球中間機構識別碼(如適用) \_\_\_\_\_

Date of Birth 出生日期 \_\_\_\_\_  Place of Birth 出生地區 \_\_\_\_\_

Nationality (Country/Region) 1\* 國籍(國家/地區) 1\* \_\_\_\_\_

Nationality (Country/Region) 2\*(please complete if different from Nationality 1) 國籍(國家/地區) 2\*(若與國籍 1 不同請填寫此欄) \_\_\_\_\_

Nationality (Country/Region) 3\*(please complete if different from Nationality 1 and 2) 國籍(國家/地區) 3\*(若與國籍(國家/地區) 1 及 2 不同請填寫此欄) \_\_\_\_\_

US Tax ID (where applicable) 美國稅務編號(如適用) \_\_\_\_\_

Local Tax ID (where applicable and optional)# 地方稅務編號(如適用及非必要填寫)# \_\_\_\_\_

Country/Region of Local Tax ID (where applicable and optional)# 地方稅務編號之國家/地區(如適用及非必要填寫)# \_\_\_\_\_

Employment Status<sup>^</sup> 職業狀況<sup>^</sup>

Self-Employed 自僱       Full-time Employed 全職       Part-time Employed 兼職       Not Currently Employed 非在職

Student 學生       Housewife 主婦       Retired 退休

Industry (where applicable)<sup>^</sup> 行業(如適用)<sup>^</sup> \_\_\_\_\_

Occupation (where applicable)<sup>^</sup> 職業(如適用)<sup>^</sup> \_\_\_\_\_

Job Title (where applicable)<sup>^</sup> 職位(如適用)<sup>^</sup> \_\_\_\_\_

Employment Start Date (where applicable)<sup>^</sup> 任職日期(如適用)<sup>^</sup> (MM月/YY年) \_\_\_\_\_

Name of Employer / Business & Address (where applicable)<sup>^</sup> 僱主/公司名稱及地址(如適用)<sup>^</sup> \_\_\_\_\_

Monthly Salary (HKD) (where applicable)<sup>^</sup> 月薪(港幣)(如適用)<sup>^</sup>

below 5,000 以下 (0)       5,000 – 9,999 (1)       10,000 – 14,999 (2)       15,000 – 19,999 (3)

20,000 – 29,999 (4)       30,000 – 49,999 (5)       50,000 – 69,999 (6)       70,000 – 99,999 (7)

100,000 – 199,999 (8)       200,000 or above 或以上 (9)

New Signature of Policyholder 保單持有人新簽署 

<sup>o</sup> Applicable when Policyholder is a Sole Proprietor 適用於保單持有人為獨資經營公司持有人

<sup>#</sup> Any country/region other than US 美國以外之國家/地區

<sup>\*</sup> Please state all your current Nationality(ies) (Country/Region) if you have any revision. In addition, nationality (country/region) proof is required if the change of nationality (country/region) applied by non-permanent Hong Kong resident. 如修正任何國籍(國家/地區)資料，請填寫閣下現在的所有國籍(國家/地區)。此外，如非香港永久居民申請修正國籍(國家/地區)資料，請附上國籍(國家/地區)證明。

<sup>^</sup> Applicable when Policyholder is an Individual 適用於保單持有人為個人

**2. Change or correction of Address/Contact Number 更改或更正地址／聯絡號碼**

I would like to apply the change or correction of Address/Contact Number to my following life insurance policy(ies) underwritten by HSBC Life (International) Limited 本人擬申請更改或更正本人由滙豐人壽保險(國際)有限公司承保之人壽保險保單之地址／聯絡號碼：

- All my life insurance policy(ies) underwritten by HSBC Life (International) Limited 所有本人由滙豐人壽保險(國際)有限公司承保之人壽保險保單
- This life insurance policy and my other life insurance policy(ies) underwritten by HSBC Life (International) Limited. Please specify the policy number(s) here 此人壽保險保單及本人其他由滙豐人壽保險(國際)有限公司承保之人壽保險保單，請在此列出有關的保單號碼：

Note 註：Please choose your change request option by inserting tick '✓' in the applicable box above. If no option is chosen, this change will be applied to this life insurance policy only. 請在以上適用的空格內劃上✓號選擇所需的更改類別。如未選擇，此更改將只限此人壽保險保單。

**Address 地址**

Address in English 英文地址

	Room/ Flat 室	Floor 樓	Block/ Tower 座數	Name of building/estate 大廈／屋苑名稱	No. and name of street/road 街道號數及名稱	District 區域	Country/ Region 國家／地區
<input type="checkbox"/> Correspondence Address 通訊地址							
<input type="checkbox"/> Current Permanent Address 現有永久住址	<input type="checkbox"/> Same as correspondence address 與通訊地址相同 <input type="checkbox"/> Others, please complete 其他，請填寫此欄 (If not specify, same as correspondence address 如未列明，與通訊地址相同。)						
<input type="checkbox"/> Current Residential Address 現有住宅地址	<input type="checkbox"/> Same as correspondence address 與通訊地址相同 <input type="checkbox"/> Same as current permanent address 與現有永久地址相同 <input type="checkbox"/> Others, please complete 其他，請填寫此欄 (If not specify, same as correspondence address 如未列明，與通訊地址相同。)						
<input type="checkbox"/> Previous Address 前居住地址	(please complete if residing in Current Residential Address less than 3 years) (若於現有住宅地址居住少於3年請填寫此欄)						

- If country/region of new address is not the same as nationality (country/region) or existing address, please provide reason 如新地址所屬之國家／地區與閣下之國籍(國家／地區)或現時地址不同，請說明原因：\_\_\_\_\_

**Telephone No. 電話號碼**

(Please provide at least one telephone no. with its country/region. Country/Region code is not necessary) (請最少提供一個聯絡電話及其所屬國家／地區。唯無須提供國家／區域編號)

Home 住宅

Hong Kong SAR 香港特別行政區  US 美國 1-  China 中國 86-  Other Countries/Regions 其他國家／地區 \_\_\_\_\_

Telephone no. 聯絡電話 \_\_\_\_\_

Work 工作

Hong Kong SAR 香港特別行政區  US 美國 1-  China 中國 86-  Other Countries/Regions 其他國家／地區 \_\_\_\_\_

Telephone no. 聯絡電話 \_\_\_\_\_

Mobile 手提電話

Hong Kong SAR 香港特別行政區  US 美國 1-  China 中國 86-  Other Countries/Regions 其他國家／地區 \_\_\_\_\_

Telephone no. 聯絡電話 \_\_\_\_\_

**E-mail Address 電子郵寄地址** \_\_\_\_\_

**3. Request for reprint of annual statement 要求重發年結通知書**

**4. Request for reprint of annual summary 要求重發保險單年結摘要**

(Applicable for HSBC EarlyIncome Deferred Annuity Plan(DEIAP) and HSBC Income Goal Deferred Annuity Plan (DANNB).)

For the Year of Assessment From \_\_\_\_\_ to \_\_\_\_\_

因應 \_\_\_\_\_ 至 \_\_\_\_\_ 之課稅年度

**5. Request for physical medical card issuance or replacement 要求補發或更換實體醫療卡**

(For HSBC Voluntary Health Insurance Scheme only 只適用於滙豐自願醫保計劃)

**6. Change of Beneficiary 更改受益人**

I hereby apply the change of Beneficiary to my following life insurance policy(ies) underwritten by HSBC Life (International) Limited 本人擬申請更改本人由滙豐人壽保險(國際)有限公司承保之人壽保險保單之受益人：

- All my life insurance policy(ies) underwritten by HSBC Life (International) Limited 所有本人由滙豐人壽保險(國際)有限公司承保之人壽保險保單
- This life insurance policy and my other life insurance policy(ies) underwritten by HSBC Life (International) Limited. Please specify the policy number(s) here 此人壽保險保單及本人其他由滙豐人壽保險(國際)有限公司承保之人壽保險保單，請在此列出有關的保單號碼：

*Note 註： Please choose your change request option by inserting tick ‘/’ in the applicable box above. If no option is chosen, this change will be applied to this life insurance policy only. 請在以上適用的空格內劃上‘/’號選擇所需的更改類別。如未選擇，此更改將只限此人壽保險保單。*

I appoint the following person(s) as Beneficiary of the Policy. This nomination supersedes all prior nominations. 本人指定下列人士為保單受益人。此項提名取代一切以往的提名紀錄。

Please provide all the required information as listed below, sign and return the application to us within one month. If the said information is missing, the application will not be complied with. 請提供下列所需資料，並於簽妥後一個月內遞交申請。若有關資料遺漏，此申請將不獲接納。

**Details of Beneficiaries 受益人資料**

**Details of Primary Beneficiaries 基本受益人資料** (If it is left blank, the Policyholder will be taken as the beneficiary. 如沒有填寫，受益人為保單持有人。)

Name 姓名	ID Type & No. 身份證明文件類別及號碼	Relationship to the Proposed Insured 與受保人關係	Minor beneficiary of age below 18 十八歲以下未成年受益人	Trustee Details (for minor beneficiary(ies) of age below 18)* 受託人資料 (如受益人為十八歲以下未成年受益人)*		Contact Telephone No. and/or Email Address (Optional) 聯絡電話及/或電郵地址 (非必要填寫)	Percentage of Entitlement 領取利益之百分比
				Trustee Name (In English) 受託人姓名 (請以英文填寫)	Trustee ID Type & No. 受託人身份證明文件類別及號碼		
			<input type="checkbox"/> Yes 是				
			<input type="checkbox"/> Yes 是				
			<input type="checkbox"/> Yes 是				
<b>Total 總計</b>							<b>100%</b>

**Details of Secondary Beneficiaries 次位受益人資料**

• If there is no primary beneficiary(ies) living at the time of the Life Insured's death, the secondary beneficiary(ies) will be taken as the beneficiary(ies) of this policy. 如受保人身故時所有基本受益人已離世，此保單的受益人將為次位受益人。

Name 姓名	ID Type & No. 身份證明文件類別及號碼	Relationship to the Proposed Insured 與受保人關係	Minor beneficiary of age below 18 十八歲以下未成年受益人	Trustee Details (for minor beneficiary(ies) of age below 18)* 受託人資料 (如受益人為十八歲以下未成年受益人)*		Contact Telephone No. and/or Email Address (Optional) 聯絡電話及/或電郵地址 (非必要填寫)	Percentage of Entitlement 領取利益之百分比
				Trustee Name (In English) 受託人姓名 (請以英文填寫)	Trustee ID Type & No. 受託人身份證明文件類別及號碼		
			<input type="checkbox"/> Yes 是				
			<input type="checkbox"/> Yes 是				
			<input type="checkbox"/> Yes 是				
<b>Total 總計</b>							<b>100%</b>

Please state the reason if beneficiary is a charity organization: 如受益人為慈善機構，請列明原因：

\* *Note 註： If the beneficiary(ies) is/are at her/his minority upon the death of the Life Insured of this policy, the above designated trustee(s) will be taken as the trustee(s) for the beneficiary(ies). 如保單內的受保人身故時受益人仍未成年，以上指定的受託人將會成為受益人的受託人。*

If you would like to appoint the above person(s) as Irrevocable Beneficiary, please submit along with the respective document ID copy. 若閣下指定上述人士為不可撤換受益人，請一併遞交其身份證明文件副本。

Change of Dementia Benefit Recipient (applicable to EarlyIncome Annuity Plan only) 更改認知障礙保障收益人 (僅適用於盈達年金計劃)：

I appoint the following person as Dementia Benefit Recipient of the Policy. This nomination supersedes all prior nominations. 本人指定下列人士為認知障礙保障收益人。此項提名取代一切以往的提名紀錄。

Name 姓名	ID Type & No. 身份證明文件類別及號碼	Relationship to the Proposed Insured 與受保人關係	Telephone No. 聯絡電話	Percentage of Entitlement 領取利益之百分比
				100%

Tick (“✓”) this box if you want the Dementia Benefit Recipient to receive basic plan Monthly Annuity Payment when the Proposed Insured is diagnosed with Severe Dementia. “Cash out” has to be selected as the payment option of the Monthly Annuity Payment. 如閣下希望於受保人被診斷患有認知障礙時將基本計劃每月年金金額支付予認知障礙保障收益人，請在此方格內加上別號 (“✓”)。年金金額支付方式須為“現金提取”。

- Notes 註：*
- The Dementia Benefit Recipient must be the Policyholder or one of the Primary Beneficiaries. If not, the Policyholder will be taken as the Dementia Benefit Recipient. 認知障礙保障收益人須為保單持有人或其中一位基本受益人。如為其他，則保單持有人為認知障礙保障收益人。
  - If the Dementia Benefit Recipient is different from the policyholder, and in case he/she passes away during the Monthly Dementia Income payout period, the benefit payout will be payable to the policyholder. 如認知障礙保障收益人與保單持有人不同，而其於每月認知障礙入息賠付期間不幸逝世，此保障金額將支付予保單持有人。

INHK006R53 (1/120)W ESIG

7. Change of Payment Method 更改繳付保費方式

- Monthly autopay from bank account\*<sup>^</sup>  
每月由銀行戶口自動轉賬 \*<sup>^</sup>
- Monthly autopay from HSBC credit card\*<sup>#o^</sup>  
每月由滙豐信用卡自動轉賬 \*<sup>#o^</sup>
- Annual autopay from bank account\* (effective on policy anniversary and not applicable to SPP/SPL policies applied for before Nov 2001, IPP policies applied for before 6 Oct 2003, and SSPP policies) (not applicable to WSPP/WSRP/WSRB/WSRC if payment currency is CNY)  
每年自動轉賬 \* (於保單周年日生效而不適用於樂網繆多保計劃、於2001年11月前申請之儲全保/卓滙投資壽險計劃、及於2003年10月6日前申請之滙全保保障計劃)(不適用於以人民幣為繳付貨幣之財富儲蓄(人民幣)保障計劃/財富儲蓄(人民幣)保險計劃/財富儲蓄(人民幣)保險計劃II/滙豐財富儲蓄(人民幣)保險計劃III)
- Annual autopay from HSBC credit card\*<sup>#o^</sup> (effective on policy anniversary and not applicable to SPP/SPL policies applied for before Nov 2001, IPP policies applied for before 6 Oct 2003, and SSPP policies)  
每年由滙豐信用卡自動轉賬 \*<sup>#o^</sup> (於保單周年日生效而不適用於樂網繆多保計劃、於2001年11月前申請之儲全保/卓滙投資壽險計劃、及於2003年10月6日前申請之滙全保保障計劃)
- Annual premium notice (effective on policy anniversary and not applicable to SPP, SPL, IPP and SSPP)  
每年郵寄賬單(於保單周年日生效而不適用於儲全保、卓滙投資壽險計劃、滙全保及樂網繆多保計劃)
- 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)
- 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)
- Shortfall or Direct Credit Claim Payment (For HSBC Voluntary Health Insurance Scheme only)  
收取索償超出賠償額的欠款或直接存入賠償款項(只適用於滙豐自願醫保計劃)

\* To apply for direct debit, please complete the Direct Debit Authorisation below. Premium and levy will be collected in HKD. 申請自動轉賬，請填寫以下之直接付款授權書。保費及保費徵費將以港元收取。

# Not applicable to Investment Linked Insurance Plan. 不適用於投資壽險計劃。

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

^ Not applicable to WealthSave Insurance Plan/WealthSave (Renminbi) Protection Plan/WealthSave (Renminbi) Insurance Plan/WealthSave (Renminbi) Insurance Plan II/WealthSave Insurance Plan III/HSBC WealthSave (RMB) Insurance Plan III/HSBC FirstSave Insurance Plan (subscribed at branches) 不適用於財富儲蓄保險計劃/財富儲蓄(人民幣)保障計劃/財富儲蓄(人民幣)保險計劃/財富儲蓄(人民幣)保險計劃II/財富儲蓄保險計劃III/滙豐財富儲蓄(人民幣)保險計劃III/滙昇儲蓄保險計劃(於分行申請)。

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個工作天可生效。

8. 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, 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。

<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
OR 或	For Integrated Account, if the debit is from the 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往來戶口，請將賬戶號碼最後3個數字寫為001。			
<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 collected in HKD. 保費及保費徵費將以港元收取。

# Not applicable to Investment Linked Insurance Plan. 不適用於投資壽險計劃。

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

^ Not applicable to WealthSave Insurance Plan/WealthSave (Renminbi) Protection Plan/WealthSave (Renminbi) Insurance Plan/WealthSave (Renminbi) Insurance Plan II/WealthSave Insurance Plan III/HSBC FirstSave Insurance Plan (subscribed at branches). 不適用於財富儲蓄保險計劃/財富儲蓄(人民幣)保障計劃/財富儲蓄(人民幣)保險計劃/財富儲蓄(人民幣)保險計劃II/財富儲蓄保險計劃III/滙昇儲蓄保險計劃(於分行申請)。

Note 註:

If total premium payment of this policy is equal to or greater than USD75,000/HKD600,000 (or other currency equivalent) per year, 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. 如保單繳付之每年保費相等或多於美元75,000/港元600,000(或等值貨幣)，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。

9. 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	
Former Name/Alias (Surname first)(where applicable) 前用姓名/別名 (先填寫姓氏) (如適用)	
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 USD75,000 per policy 必須填寫以下部分如每張保單繳付之每年保費相等或多於美元 75,000</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	

10. Suspension/Re-activation of Premium Collection\*\* 暫停/恢復定期保費\*\* (applicable to Saving Protection Plus, Super Life, Integrated Protection Plus, Salary Savings Protection Plan, LifInvest Protection Plus, RetireInvest Protection Plus and WealthInvest Insurance Plan 只適用於儲全保/卓滙投資壽險計劃/滙全保/樂網繆多保計劃/投資儲全保/退休儲全保/財富投資保險計劃)

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 will 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 LifInvest 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。

Initial of Policyholder  
保單持有人簡簽

11. Change of Annuity Payment Option 更改年金選擇方式 (only applicable to EarlyIncome Annuity Plan, HSBC EarlyIncome Deferred Annuity Plan, Income Goal Insurance Plan, Income Goal Insurance Plan II, HSBC Income Goal Deferred Annuity Plan, RetireEnrich Protection Plus and RetireIncome Annuity Plan 僅適用於盈達年金計劃、滙豐盈達延期年金計劃、聚富入息計劃、聚富入息計劃II、滙豐聚富入息延期年金計劃、聚全保及退休收入年金計劃)

Payment at monthly interval 按月收取現金  Rollover 積存生息

**12. Change of Dividend / Guaranteed Cash Bonus / Endowment Option 更改紅利/保證現金運用方式**

Dividend option\* (not applicable to IPP, LBP, SPL, SPP, SSPP, ESA, E3A, LIPV, RIVP, ULPP, ULEP, WIIP, WIPP, WSRP, WSRB, WGIP, WGIP2, FGIP and HGIP)

紅利運用方式(不適用於滙全保/富全保/卓滙投資壽險計劃/儲全保/樂網繆多保計劃/豐全保/投資儲全保/退休儲全保/駿富保障萬用壽險計劃/駿富教育萬用壽險計劃/財富投資保險計劃/財富投資人壽計劃/財富儲蓄(人民幣)保險計劃/財富儲蓄(人民幣)保險計劃II及滙溢保險計劃/滙溢保險計劃II/滙盛人生保險計劃及滙康保險計劃)

- Paid-up addition 增購繳清保險  Accumulate with interest 累積生息  Cash out 現金提取<sup>^</sup>

Guaranteed Cash bonus / Endowment option (only applicable for LSPP, ESA, E3A, LIPV, RIVP, REPP, RIAP and SEPP)

保證現金運用方式(只適用於樂全保/退休樂全保/教育樂全保/豐全保/投資儲全保/退休儲全保/聚全保/退休收入年金計劃及積全保)

- Accumulate with interest 累積生息  Cash out 現金提取

\* For Income Goal Insurance Plan, Income Goal Insurance Plan II and HSBC Income Goal Deferred Annuity Plan, change of dividend option will also apply to special and terminal bonus payment. 對於聚富入息保險計劃, 聚富入息保險計劃II及滙豐聚富入息延期年金計劃, 紅利運用方式的變更都會更改期末獎賞派發方式。

<sup>^</sup> For HSBC EarlyIncome Deferred Annuity Plan and HSBC Income Goal Deferred Annuity Plan, dividends can only be cashed out after premium payment period, before which all dividends declared (if any) will be accumulated in the policy with interest. 滙豐盈達延期年金計劃及滙豐聚富入息延期年金計劃下之紅利只可在保費繳付期後才能以現金收取, 期間之紅利(如有)將存於保單內積存生息。

**Payment Instruction 發還款項指示 (If "Payment at monthly interval" option is selected in Section 11 or "Cash out" option is selected in Section 12, please fill in this section. 如於第 11 部分中選擇「按月收取現金」或於第 12 部分選擇「現金提取」, 請填寫此部分。**

- By Bank Account 經銀行戶口

Transfer to the policyholder's premium deduction account (not applicable if the bank account is held by someone other than the policyholder's sole or joint name.) 轉賬至保單持有人之保費轉帳戶口(不適用於非保單持有人之個人或聯名銀行戶口。)

Transfer to the policyholder's any other bank account<sup>^</sup> (Not applicable if the bank account is held by someone other than the policyholder's sole or joint name.) 轉賬至保單持有人之任何其他銀行戶口<sup>^</sup>(不適用於非保單持有人之個人或聯名銀行戶口。)

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

(Applicable to payment in HKD / USD 適用於港幣/美金之轉帳)

Account Holder Name 戶口持有人姓名 \_\_\_\_\_

- By cheque 以支票形式

Policy currency 保單貨幣

HKD for USD policies 港幣付款(適用於美金保單)

Please 請把支票

Mail the cheque to the Policyholder's correspondence address 請寄往保單持有人之通訊地址

<sup>^</sup> If no identity verification has been performed by Bank staff for this request, please also submit adequate proof showing the policyholder's full name and the bank account number (such as copy of bank book, ATM card, bank statement etc) to the company. If we do not receive the copy of the required document(s), the payment will be made by cheque payable to the policyholder and mailed to the policyholder's correspondence address. 如此申請並沒經由銀行職員作出身份核實, 請同時提交印有保單持有人全名及銀行戶口號碼之充足證明(如銀行存摺或自動櫃員機卡或月結單副本等)。若閣下沒有提供上述所需文件, 退款將以支票形式寄予保單持有人之通訊地址。

**13. Update Occupation Details for Policyholder 更新保單持有人職業資料**

- If there is no update, please insert tick '✓' in the box 如無任何轉變, 請在空格內劃上 ✓ 號

Employment Status (For personal policyholder) 職業狀況(適用於個人保單持有人)

- Self-Employed 自僱  Full-time Employed 全職  Part-time Employed 兼職  Not Currently Employed 非在職  
 Student 學生  Housewife 主婦  Retired 退休

Industry (where applicable) (For personal policyholder) 行業(如適用)(適用於個人保單持有人) \_\_\_\_\_

Occupation (where applicable) (For personal policyholder) 職業(如適用)(適用於個人保單持有人) \_\_\_\_\_

Job Title (where applicable) (For personal policyholder) 職位(如適用)(適用於個人保單持有人) \_\_\_\_\_

Employment Start Date (where applicable) (For personal policyholder) 任職日期(如適用)(適用於個人保單持有人) (MM 月 / YYYY 年) \_\_\_\_\_

Name of Employer / Business & Address (where applicable) (For personal policyholder) 僱主/公司名稱及地址(如適用)(適用於個人保單持有人) \_\_\_\_\_

Monthly Salary (HKD) (where applicable) (For personal policyholder) 月薪(港幣)(如適用)(適用於個人保單持有人)

- below 5,000 以下 (0)  5,000 – 9,999 (1)  10,000 – 14,999 (2)  15,000 – 19,999 (3)  
 20,000 – 29,999 (4)  30,000 – 49,999 (5)  50,000 – 69,999 (6)  70,000 – 99,999 (7)  
 100,000 – 199,999 (8)  200,000 or above 或以上 (9)

Business Nature (For corporate policyholder) 業務性質(適用於公司保單持有人) \_\_\_\_\_

Main source of income (For both personal and corporate policyholder) 主要收入來源(適用於個人及公司保單持有人)

- Salary 薪金  Saving 儲蓄  Donation 捐獻  
 Inheritance 遺產  Business Income 生意收入  From Business Owner 由生意持有人提供  
 Return on Investment 投資回報  Sales Proceed 銷售收入  Fee and Commission Income 酬金及佣金收入  
 Others, please state 其他, 請註明: \_\_\_\_\_

- 14. Others 其他**

# 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 any 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：中英文本如有任何歧義，概以英文本為準。

I/We understand and agree that: (i) a prescribed levy will be imposed on this policy by the Insurance Authority ("IA") pursuant to section 134 of the Insurance Ordinance (Cap. 41) and it is my/our statutory duty to pay such prescribed levy required for this policy to the IA through HSBC Life (International) Limited ("the Company"); (ii) such levy payment should be made together with the premium payment to the Company for direct remittance to the IA within the remittance period as prescribed by the IA; (iii) subject to the applicable levy cap, the amount of levy payable for each premium payment is the amount of the premium multiplied by the applicable levy rate as prescribed by the IA from time to time; (iv) the policy date or the policy anniversary date is used to determine which levy rate is applicable for calculating the levy payable in a particular policy year. All subsequent premiums to be paid will also be subject to the applicable levy rate and levy cap; and (v) if I/we choose to make the payment by direct debit or credit card, the Company will debit the amount of my/our initial and/or regular premium required together with the applicable levy as prescribed by the IA from time to time, and therefore sufficient funds will be maintained in my/our bank/credit card account to pay the subsequent premiums and levy. 本人(等)明白並同意: (i) 根據《保險業條例》(第41章)第134條, 保險業監管局(「保監局」)將按此保險單收取訂明保費徵費及本人(等)有法定責任透過滙豐人壽保險(國際)有限公司(「貴公司」)繳付訂明保費徵費予保監局; (ii) 此保費徵費應與保費一同繳付予貴公司, 並再由貴公司於保監局指明的轉付期內直接轉付予保監局; (iii) 需繳付的保費徵費是保單的每期保費金額與適用的徵費率之相乘, 但受限於保監局不時訂明的通用徵費上限; (iv) 保單日期或保單周年日用於決定使用那個適用的徵費率以計算該保單年度應繳付的保費徵費, 往後需繳付的保費亦會根據訂明的適用徵費率及徵費上限收取保費徵費; (v) 若本人(等)選擇以自動轉賬或信用卡付款, 貴公司將從本人(等)的指定戶口收取首期及/或應付的定期保費及保監局不時訂明的適用保費徵費。本人(等)並同意會於本人(等)指定銀行/信用卡戶口維持足夠結餘以繳付往後保費及保費徵費。

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。

**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](http://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](http://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線。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](http://www.hsbc.com.hk)). 於滙豐網站([www.hsbc.com.hk](http://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/電子郵件地址指示表格(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(美國預扣稅責益擁有外人外國身分證明書)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 Policyholder 保單持有人簽署  	Signature of Assignee/Irrevocable Beneficiary (if any) 承讓人/不可撤換受益人簽署(如適用)  	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.	