



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

Important Note 重要提示：

- We will process your request within approximately 5 working days upon receipt of the form.
本公司將在收到申請表後大約五個工作天內處理您的申請。
- Please note that 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, 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。
- 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。

Please return the form and relevant documents via one of the channels listed below.

請透過以下途徑遞交表格及相關文件。

- Mail to 18/F, Tower 1, HSBC Centre, 1 Sham Mong Road, Kowloon, Hong Kong 郵寄至香港九龍深旺道1號滙豐中心1座18樓；OR
- Submit to any HSBC Branch 可於任何滙豐分行遞交

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

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

1. Request for statement 要求賬目報告

2. 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。

Notes 注意事項：

- 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。

Declaration and Authorisation 聲明及授權書

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：
- 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; 當本人考慮投放在理財目標的金額時，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；
 - 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；
 - seek independent professional tax advice whenever necessary, including but not limited to any tax implications on: (a) the value of my estate, and (b) any other tax issues. e.g. those related to non-Hong Kong citizen; 如在必要時諮詢專業的稅務意見，包括但不限於：(a) 遺產價值，及 (b) 其他稅務問題，例如：非香港公民身份；
 - 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，維持充足的可用資金，及將資產的較大部分存放在存款戶口；
 - 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；
 - 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 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 explanation 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。

By signing below, I/we confirm the above application and 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 the Personal Data (Privacy) Ordinance (which may otherwise be referred to as 'Personal Information Collection Statement'). I understand I can view such notice by scanning the QR code below, or else I can request a copy by visiting my local HSBC Branch or by calling the Life Insurance Service Hotline: (852) 2583 8000. 本人(等)在下方簽署即確認上述申請，並同意貴公司可根據本表格內有關個人資料(私隱)條例的通知書(也可稱為「個人資料收集聲明」)內列出的用途，使用及披露現時或其後持有有關本人(等)的所有個人資料。本人明白可以透過掃描下方的二維碼瀏覽該通知書，或可前往各滙豐分行或致電滙豐人壽保險服務熱線：(852) 2583 8000 索取該通知書的副本。

Personal Information
Collection Statement (English)

個人資料收集聲明(中文)



I acknowledge and agree only a restricted scope of services for my life insurance policy can and shall be provided to me during any time when I am located in the United States, either temporarily or permanently, when giving out any instruction for such services to HSBC Life (International) Limited. 本人確認及同意當本人短暫或永久身處在美國期間發出的任何人壽保險保單指示，滙豐人壽保險(國際)有限公司只能提供有限的服務。

Signature 簽署

Signature of Policyholder
保單持有人簽署

Date 日期：_____

Signed at (city, country/region)
於(城市、國家/地區)簽署

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	Servicing staff RI no.	Servicing staff IA no.	Branch code and chop
<input type="checkbox"/> Form copy provided to customer			