



Change of Policy Payment Option 更改保單付款方式

Important Note 重要提示：

- Your request will be processed within approximate 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 provide bank account proof (if applicable). 請提供銀行帳戶證明(如適用)。
- HSBC Life (International) Limited is referred to as the "Company" or "HSBC Life" in this document. 滙豐人壽(國際)有限公司在此文件中稱為「本公司」或「滙豐保險」。
- 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,閣下需按要求提供相關核實證明。
- Such change will not be effective until issuing written confirmation to you by HSBC Life (International) Limited. 由本公司向閣下發出書面確認前,有關更改不會生效。

Please submit the form and relevant documents via one of the available channels below. 請將表格和相關文件用以下其中一種方式遞交。

- Scan the QR code on your right hand side to upload documents to "Document Upload Service" on HSBC website 您可以掃描右方的二維碼上載相關文件到滙豐網站上的「文件上載服務」: OR 或
- 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 或
- 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

Section I – Change of Policy Payment Option (please refer note 1 for product name) 第一部分 – 更改保單款項方式(完整的產品名稱請參閱註1)

1. Change of Dividend Payment Option* 更改紅利運用方式*

Dividend option* (not applicable to IPP, LBP, SCIP, SPL, SPP, SSPP, ESA, E3A, LIPV, RIVP, ULPP, ULEP, WIIP, WIPP, WSRP, WSRB, WGIP, WGIP2, WPLP, UWGIP, JWIP, EGIP, FGIP and HGIP) 紅利運用方式(不適用於滙全保/富全保/滙達保危疾保障計劃/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/滙溢保險計劃II/滙萃保障相連保險計劃/滙溢尊尚保險計劃/滙禧保險計劃/滙圖多元貨幣保險計劃/滙盛人生保險計劃及滙康保險計劃)

- Cash out[^] 現金提取[^] Rollover 積存生息 Paid-up addition 增購繳清保險

* For IGIP, IGIP2, DANNB and FIAP, 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,滙豐聚富入息延期年金計劃及滙豐裕達年金計劃,紅利運用方式的變更都會更改期末獎賞派發方式。

[^] For DEIAP and DANNB, 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。

2. Change of Annuity Payment / Guaranteed Cash Bonus / Endowment Option / Maturity Benefit Payment / Cash Fund Dividend Payment Option 更改年金金額/保證現金運用方式/期滿利益款項運用方式/基金紅利款項運用方式

Annuity Payment option (only applicable to EIAP, DEIAP, FIAP, IGIP, IGIP2, DANNB, REPP and RIAP) 年金金額運用方式(僅適用於盈達年金計劃、滙豐盈達延期年金計劃、滙豐裕達年金計劃、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)

- Accumulate with interest 累積生息 Payment at Monthly interval 按月收取現金

Guaranteed Cash bonus / Endowment option (only applicable for LSPP, ESA, E3A, LWPP, 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/財富樂全保/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

Maturity Benefit Payment Option (Please submit the request before 7 working days of maturity date, otherwise, the payment will refund by existing system record) 期滿利益款項運用方式(請在保單期滿日前7個工作天提交申請表,否則款項將以現有的系統紀錄發放)

- Lump Sum Payment 一次過付款
 Regular Payment by Monthly Instalment 分期按月付款 (10 years 年 20 years 年)

Cash Fund Dividend Payment Option (only applicable to WIIP, WIPP, WPLP) (this option not apply to accumulated with interest) 基金紅利款項運用方式(只適用於財富投資保險計劃、財富投資人壽計劃、滙萃保障相連保險計劃)(此選項不適用於累積生息)

- Cash out 現金提取

■ 3. Change of Death Benefit Payout Instruction (for Annuity Plan) 更改身故賠償發放指示 (適用於年金計劃)

Lump sum to beneficiary 一次性金額支付予受益人*

Beneficiary continues to receive the unpaid Monthly Annuity Payment until the end of the Annuity Period 受益人將繼續收取未支付的每月年金金額直至年金期結束為止**

* Under this instruction, the beneficiary(ies) may receive the death benefit in one lump sum payment immediately (with the exclusion of the future dividends, if any). 如選擇此項指示，受益人將可即時獲得一筆過全數支付的身故賠償(但不包括其後的紅利，如有)。

** Under this instruction, the policy will remain in force upon the death of the Life Insured until the time at which all outstanding benefits under the policy have been paid or become payable. The beneficiary(ies) may continue to receive the unpaid Monthly Annuity Payment together with the future dividends, if any, under the policy over the remaining Annuity Period. For REPP, RIAP, ANNB, DANNB, ANNB2 and DEIAP it shall only operate if the Life Insured dies on or after the commencement of Annuity Period. For EIAP and FIAP, it should only operate if the Life Insured dies anytime upon the expiration of the relevant premium payment term. 如選擇此項指示，當受保人死亡時，保單將繼續生效直至於保單內未償付的全數金額已經支付或將會支付。受益人將繼續在餘下的年金期內收取尚未支付的每月年金金額及獲發其後的紅利(如有)。如保單為聚全保、退休收入年金計劃、聚富入息保險計劃、滙豐聚富入息延期年金計劃、聚富入息保險計劃II及滙豐盈達延期年金計劃，當受保人於年金期開始或以後身故才執行此項指示。如保單為盈達年金計劃及滙豐裕達年金計劃，有關指示只會在受保人於本保單保費繳付年期結束以後身故才執行。

■ 4. Change of Death Benefit Settlement Option[^] (Applicable to WGIPII, UWGIP, JWIP, EGIP, Jade Global Generations Universal Life, Jade Ultra Global Generations Universal Life and PGIP only)

更改身故賠償支付選項[^] (適用於滙豐保險計劃II、滙豐尊尚保險計劃、滙禧保險計劃、滙圖多元貨幣保險計劃、翡翠環球世代萬用壽險、翡翠尊尚環球世代萬用壽險及滙豐環球壽險計劃)

(Please tick one only 請只選擇一項)

One lump sum payment 一筆過全數支付*

10-year instalment (annual payment) 10年分期支付(每年支付)*

20-year instalment (annual payment) 20年分期支付(每年支付)*

30-year instalment (annual payment) 30年分期支付(每年支付)*

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

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

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

Note 註：

1. 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) ; LVP: LifeInvest Protection Plus (投資儲全保) ; RVP: RetireInvest Protection Plus (退休儲全保) ; IPP: Integrated Protection Plus (滙全保) ; SSPP: Salary Savings Protection Plan (樂網多保計劃) ; LBP: LifeBond Plus (富全保) ; LWPP: Lifestyle Wealth Protection Plus (財富樂全保) ; ESA/E3A: LifeSave Protection Plus (豐全保) ; REPP: RetireEnrich Protection Plus (聚全保) ; SEPP: SaveEnrich Protection Plus (積全保) ; 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) ; HSBC Ultra Wealth Goal Insurance Plan 滙豐尊尚保險計劃 ; FGIP: HSBC Family Goal Insurance Plan (滙豐人生保險計劃) ; HGIP: HSBC Health Goal Insurance Plan (滙康保險計劃) ; EIAP: EarlyIncome Annuity Plan (盈達年金計劃) ; DEIAP: HSBC EarlyIncome Deferred Annuity Plan (滙豐盈達延期年金計劃) ; IGIP: Income Goal Insurance Plan (聚富入息保險計劃) ; IGIP2: Income Goal Insurance Plan II (聚富入息保險計劃II) ; DANNB: HSBC Income Goal Deferred Annuity Plan (滙豐聚富入息延期年金計劃) ; FIAP: HSBC Flourish Income Annuity Plan (滙豐裕達年金計劃) ; SCIP: HSBC Swift Guard Critical Illness Plan (滙豐保危疾保障計劃) ; WPLP: HSBC Wealth Select Protection Linked Plan (滙豐保障相連保險計劃) ; JWIP: HSBC Jubilee Wealth Insurance Plan (滙禧保險計劃) EGIP: HSBC Eminent Goal Multi-Currency Insurance Plan (滙圖多元貨幣保險計劃)。
2. 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。
3. 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? Yes/No. 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？是/否。如答「是」，請填寫信託核實表格及提供其註明的相關證明文件。
4. (For corporate customer) Is there any change in directorship, beneficial owner or authorised signatory of the company since the policy was issued? Yes/No, 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/或負責人否有轉變？如有，請填寫「公司授權表格」。

Section II – Payment Instruction 第二部分 – 發還退款指示**PAYMENT made payable to Policyholder/Assignee 收款人為保單持有人／承讓人**

- Policyholder 保單持有人
 Assignee 承讓人

(If “Payment at Monthly interval”, “Cash out”, “Lump Sum Payment” and “Regular Payment by Monthly Instalment” in Section 1, please fill in this section. 如第 1 部分選擇「按月收取現金」、「現金收取」、「一次過付款」及「分期按月付款」，請填寫此部分。)

- Policy currency 保單貨幣 HKD for NON-HKD policies 港幣付款(適用於非港幣保單)

Please select one of the payment instruction below. 請選擇以下其中一個發還退款指示。

By Autopay 自動轉帳

- Credit to the Policyholder bank account below 存入以下保單持有人銀行戶口
 Credit to the Assignee’s bank account below ^ 存入至承讓人之戶口 ^

Please provide bank account proof 請提供銀行帳戶證明

| Bank No. 銀行號碼 | Branch No. 分行號碼 | Account No. 戶口號碼 |
|------------------|--------------------|---------------------|
| | | |

Notes 註：

- (i) If no identity verification has been performed by Bank staff for this request, please also submit adequate proof showing the policyholder / assignee’s full name and the bank account number (such as copy of bank book, ATM card, bank statement etc) to the HSBC Life. If we do not receive the copy of the required document(s), the payment will be made by cheque payable to the policyholder / assignee and mailed to the policyholder / assignee’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／承讓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)寄回滙豐保險)。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／承讓人之通訊地址。
- (ii) Please submit your identity document copy if the policy is enrolled online. 如您經網上投保，請遞交身份證明文件副本。

By Telegraphic Transfer 電匯 ^ (Only applicable for overseas client 只適用於海外客戶)

Name of Bank Account Holder 銀行戶口帳戶持有人姓名：_____

Name of Bank 銀行名稱 (OVERSEAS BANK 海外銀行)：_____ Please provide bank account proof 請提供銀行帳戶證明

Bank Account Number 銀行帳戶號碼：_____

IBAN Number 國際銀行帳戶號碼 (if applicable 如適用)：_____

Address of Bank 銀行地址：_____

Swift Code 銀行編號：_____

The Reason for Telegraphic Transfer 電匯原因：_____

Name of Intermediary/Correspondence Bank 中轉銀行名稱 (if applicable 如適用)：_____

Swift Code Intermediary/Correspondence Bank 中轉銀行銀行編號 (if applicable 如適用)：_____

Notes 註：

If provided information is incomplete or missing relevant bank account proof, the payment will be mailed out by cheque. 如未能提供完整資料或相關銀行戶口證明，款項將以支票形式寄出。

Bank account holder must be the same person of policyholder / assignee. 銀行戶口帳戶持有人必須為保單持有人／承讓人。

By Cheque 以支票形式 (Only applicable for payment currency in CNY/HKD/USD 只適用於收款貨幣為人民幣／港幣／美金)

Please mail the cheque to 請把支票寄往

- Policyholder’s correspondence address 保單持有人之通訊地址
 Assignee’s correspondence address 承讓人之通訊地址
 To change address, please tick and give details. 如需更改地址，請✓及填上資料。

Any charges may be incurred as a result of receiving the payment from the Company, including but not limited to depositing into bank account and cheque encashment, will be borne by the policyholder. 任何由於收取由本公司發出之款項而可能產生的費用，包括但不限於存入銀行帳戶及兌現支票^，將由保單持有人承擔。

^ If the receiving bank is non-HSBC, bank charges incurred will be deducted from the amount payable to the said bank, if applicable. 如收款戶口非滙豐銀行，該銀行將於提出款項中收取服務費用，如適用。

Declaration and Authorisation 聲明及授權書

- (1) I/We hereby declare that all answers to any questions any statements made are, to be best of my knowledge and belief, complete and true, whether written by own hand or not, and I/we agree that they are, with the following agreements, to be considered as the basis of the proposed Changes and shall not take effect until this application has been approved by HSBC during the lifetime and continued insurability of the person insured by the said policy and any required premium has been paid. 本人(等)聲明, 以上提供之資料(不論是否親筆填寫)皆完全屬實及真確無訛, 並清楚明白這些答案將成為此申請更改保障之依據。此更改之申請必須經滙豐核準及在受保人在生及健康時收妥所需保費始能生效。
- (2) By signing below, I/we agree that HSBC may use and disclose all personal data about me/us that HSBC currently or subsequently holds for the purposes as set out in the Notice relating to Personal Data (Privacy) Ordinance which accompanies this form. 本人(等)在下方簽署即同意滙豐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滙豐現時或其後持有有關本人(等)的全部個人資料。
- (3) 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 my/our information contained in this application form (except for the correspondence address) with the Bank for the purpose of updating 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)有限公司有權向滙豐提供本人(等)在此申請表格上所載的有關資料(通訊地址除外)以更新滙豐之相關業務所儲存有關本人(等)的資料。
- (4) 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。

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') that HSBC Life have most recently notified me of, and I understand I can scan the QR code below for review or else I can request a copy by visiting my local HSBC Branch or through 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。該條例亦是貴公司最近通知本人有關「個人資料收集聲明」, 本人亦明白「個人資料收集聲明」可以掃描下方的二維碼瀏覽及可向滙豐各分行或致電(852) 2583 8000索取。

PICS 2020Jun (English)

個人資料收集聲明(中文)

**Signature 簽署**Signature of Policyholder
保單持有人簽署Signature of Irrevocable Beneficiary (if any)
不可撤換受益人簽署(如適用)Signature of Assignee
(with company chop, if any)
承讓人簽署(附上公司蓋章, 如適用)

Date 日期: _____

Date 日期: _____

Date 日期: _____

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

For Bank Use Client's ID copy attached

Staff Name and ID:

Servicing Staff IA No.

Branch Code and Chop

 Client's original ID sighted

Contact No.:

Servicing Staff RI No.