Disclaimer

1. Acceptance

1.1. Please read the terms of this Disclaimer which applies to your use of this sample of Risk Profile Questionnaire (the "RPQ"). By reading the material discussed in this RPQ, you are deemed to have accepted the terms of this Disclaimer.

2. Accuracy

2.1. Whilst Heng An Standard Life (Asia) Limited ("HASL Asia") endeavors to capture necessary information in this RPQ base on industry practice and applicable guidelines issued by Insurance Authority ("IA") as at the date of issue, you should treat this RPQ only as reference material for you to commence the development of your specific version of the financial needs analysis, risk profile questionnaire and/or suitability check process.

2.2. You should not rely solely on this RPQ to perform the financial needs analysis, risk profiling of your client and/or suitability checks with your client. You should base on your professional judgment and expertise advice to tailor this RPQ to address your specific business requirements and situation.

2.3. Please note that HASL Asia may change the content, presentation and availability of all or part of this RPQ at any time without prior notice.

3. Advice

3.1. This RPQ is for information only and does not constitute official or formal advice in any way.

3.2. IA may update the requirements from time to time and the information presented in this RPQ might not be current. You should revisit the information published by all applicable professional and regulatory bodies to ensure that you have seen and are aware of the latest requirements.

3.3. You should seek professional advice when you are in any doubt as to the accuracy and currency of any information contained on this RPQ

4. Exclusion

4.1. HASL Asia makes no warranties or representatives as to the accuracy of the information in this document. HASL Asia assumes no liability or responsibility for any errors or omissions in the content of this document. In particular, HASL Asia will not liable for the accuracy, completeness, adequacy, timeliness, or comprehensiveness of the Information contained in this document.

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免責聲明

1. 接受條款

1.1. 請參閱本免責聲明的條款，閣下使用此風險承擔能力問卷（「本問卷」）樣本將受該等條款約束。閣下閱讀本問卷所述材料會被視為接受本免責聲明的條款。

2. 準確性

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3. 忠告

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3.3. 閣下如對本問卷所載任何資料的準確性及時效性有任何疑問，尋求專業建議。

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Heng An Standard Life 恒安標準人壽

Risk Profile Questionnaire
風險承擔能力問卷

Policy number 保單編號：	
Name of First Policy Owner 第一保單持有人姓名	HKID / Passport No 香港身份證 / 護照號碼
Name of Second Policy Owner (if any) 第二保單持有人姓名 (如適用)	HKID / Passport No 香港身份證 / 護照號碼

Please note that the result of this Risk Profile Questionnaire ("RPQ") will be applied to all your policies held with Heng An Standard Life (Asia) Limited, except for joint-owned* and trust-owned policies

請注意此風險承擔能力問卷（「本問卷」）的結果將適用於所有您在恒安標準人壽（亞洲）有限公司持有的保單, 聯合保單*及信託保單除外。

* For joint-owned policies, the result of this RPQ will be applied if such policies are held by the same policy owners under this RPQ.

* 若是聯合保單，本問卷的結果將適用於其他跟本問卷具有相同保單持有人的聯合保單。

Important Note:

重要事項

Please complete this "Risk Profile Questionnaire" ("RPQ") which covers questions about your investment objective, investment horizon, risk tolerance, financial circumstances, knowledge and experience in investment (including investment knowledge in derivatives). Once all the questions are completed, the result will indicate your investment risk profile based on your given answers.

請填寫此「風險承擔能力問卷」("RPQ")，其中涉及有關您的投資目標、投資年期、風險承受能力、財務狀況、投資知識和經驗（包括與衍生工具有關的投資知識）。 完成所有問題後，將根據您的答案顯示您的投資風險承擔能力。

If you intend to subscribe to investment choices involving virtual assets (e.g. Virtual Asset Exchange-Traded Funds), you are required to complete a separate Virtual Assets Experience and Knowledge Assessment Form prior to making any investment choice selection. Failure to do so may result in your application for switching of investment choices, redirection of future premiums/contributions or top up being rejected.

如您有意認購任何涉及虛擬資產（例如虛擬資產交易所買賣基金）的投資選擇，您必須先完成一份獨立的虛擬資產經驗及知識評估，否則您的轉換投資選擇、更改未來供款之投資比例或增加投資申請可能會被拒絕。

Please note that:

請注意:

1. The investment risk profile derived is indicative and for reference only. It may not match your actual investment risk appetite.
   由本問卷得出的投資風險承擔能力僅供參考之用。 它可能與您的實際的投資風險偏好不符。
2. Heng An Standard Life (Asia) Limited (the "Company") is required to obtain information on your financial needs, objectives and current financial situation in order to make reasonable suitability assessment on Investment-Linked Assurance Scheme ("ILAS") products and its investment option(s). Depending on individual circumstances, you may need to consult your financial adviser for further understanding of your own investment risk profile.
   恒安標準人壽有(亞洲)有限公司(「本公司」)需要您提供有關財務需要、 目標及現時財政狀況的資料 ， 以便對投資相連壽險計劃(「投連壽險」) 產品及其投資選項的合理的合適性評估。 因應個別情況，您可能需要諮詢您的財務顧問以進一步了解您的投資風險取向。
3. This RPQ is designed to help the Company assess your investment risk profile. If relevant information is not provided, the Company may not be able to process your application(s). This RPQ does not constitute any offer, solicitation or recommendation of any investment product. You should seek independent professional advice if you have any doubt regarding the result of this RPQ.
   本問卷用以協助本公司評估您的投資風險取向。如您不提供有關資料，本公司可能無法處理您的申請。本問卷並不構成任何投資產品的要約、招攬或建議。如您對本問卷之分析存有任何疑問，敬請您諮詢獨立專業意見。
4. The results of this RPQ are derived from the information you provide to the Company and are built upon the assumptions that an appropriate risk level will depend on your investment preference and experience, risk tolerance and financial circumstances. The risk tolerance level is divided into 5 levels where the investment products involving higher risk are only suitable for those customers with higher risk tolerance level. Your answers have material impact on the indicative result of this RPQ. You must provide information that is valid, true, complete, accurate and updated where your failure in doing so would materially affect the accuracy and reliability of our suitability assessment. The Company has no liability for the risk profiling result if you are provided with inaccurate or incomplete information.
   本問卷的結果乃根據您提供予本公司的資料而得出，本問卷內容是基於以下假設：您適宜的風險水平將取決於您的投資取向及經驗、風險承受及財務狀況。風險承受級別分為5個級別，其中較高風險的投資產品僅適合於風險承受級別較高的客戶。您的答案對本問卷的指示性結果有重大影響。請您務必提供有效、真實、完整、準確及最新的資料。如您未能提供該等資料將會對本公司的合適性評估之準確性及可信性產生重大影響。如您提供不準確或不完整資料，本公司不會對所作出的風險取向評估結果負上任何責任。

5. Please select the most appropriate answers for all questions. The Company may not be able to process your application(s) if there's any unanswered question(s).
   請就所有題目選擇最適合的答案，如您有任何未回答題目，本公司可能無法處理您的申請。
6. Before making any investment decisions, you should fully understand the product risks and merits, determine that the investment is consistent with your objectives and that you are able to assume the risk. If you have any questions about investment, you are advised to seek independent professional advice.
   作出任何投資決定前，您應全面了解有關產品的風險和回報，確定該投資符合您的投資目標，且有關風險亦在您承受能力之內。如對投資有任何疑問，請尋求獨立專業意見。
7. The Company recommends you to refresh your risk profile every 12 months or when there are any material changes on the information provided. In the case your RPQ has expired or you have never submitted a RPQ, your risk tolerance level may be default to the lowest level.
   本公司建議您每12個月或當所提供的信息有任何重大變化時，更新您的風險評估。如本問卷已過期或從未提交, 您的風險承受級別可能將預設為最低級別。
8. If more than one instruction of change in risk profile level is received by the Company on the same working day via whatever means, the Company has the sole discretion to determine the priority in dealing with such instructions or to defer such instructions and the Company shall not be liable for any direct, indirect, special or consequential loss or damages in this regard.
   如在同一個工作日內以任何方式收到多於一個更改風險評估的指示，本公司可全權酌情決定該等指示的處理先後次序或延遲處理該等指示及本公司對於因此而引起的的任何直接、間接、特殊或後果性損失或損害不承擔任何責任。
9. You should seek further advice if you have any doubt regarding the result of this RPQ.
   如您對本問卷之分析存有任何疑問，敬請您諮詢其他意見。

Section 1: Risk Profile 第一部分：風險評估

Please complete the RPQ, and "✔" where appropriate 請填妥本問卷，及在適當位置加上"✔"

I. Basic Information 基本資料

1. What is your age? 您現時的歲數是?

☐ Age 18 – 30 18 – 30歲(5)	☐ Age 31 – 44 31 – 44歲 (4)	☐ Age 45 – 54 45 – 54歲 (3)	☐ Age 55 – 64 55 – 64歲 (2)	☐ Age 65 or above 65 歲或以上 (1)

2. What is your education level? 你的教育程度是？

☐ University degree or above 大學或以上 (5)	☐ Post-Secondary or High Diploma or Associate Degree or equivalent qualifications 預科 或 高級文憑 或 副學士或其他同等學歷畢業(4)	☐ Secondary Completed 中學畢業(3)	☐ Primary Completed 小學畢業(2)	☐ Primary Not Completed 小學沒有畢業(1)

II. Investment Knowledge and Experience 投資知識和經驗

3. How many years of investment experience (exclude savings, fixed deposit and foreign currency deposit) do you have?
   您有多少年投資經驗 (不包括儲蓄、定期儲蓄及外幣儲蓄) ?

☐ Over 10 years 多於10年 (5)	☐ 7 – 10 years 7 – 10 年 (4)	☐ 4 – 6 years 4 – 6 年 (3)	☐ 1 – 3 years 1 – 3 年 (2)	☐ Less than 1 year 少於 1 年 (1)

4. From the recent 3 years, which of the following products you have invested with at least 5 times*? (You may select more than 1 option. Yet, only the selected option with the highest score will be counted.)
   在最近三年內，以下哪些產品你有投資過最少五次*? (您可選擇多於一項，惟只以分數最高的選項作計算)

☐ Derivatives (Including but not limited to structured products, linked deposits / FX trading with margin / Mutual Funds (derivative fund))
衍生產品 (包括但不限於結構性產品 / 掛鉤存款 / 外匯槓桿投資 / 基金 (衍生產品基金)) (5)

☐ Investment-Linked Assurance Scheme / Mutual Funds (Non-derivative fund)
投資相連壽險計劃 / 基金 (非衍生產品基金) (3)

☐ None / Savings / Fixed Deposits / Foreign Currency / Certificate of Deposits Deposit
沒有 / 儲蓄 / 定期儲蓄 / 外幣儲蓄 / 存款證 (1)

☐ Stocks
證券 (4)

☐ Bonds
債券 (2)

* For investment-linked assurance scheme and mutual funds, each subscription/regular contribution/additional contribution or switch-in of an Investment choice is counted as 1 time of investment.

* 以投資相連壽險計劃及基金投資而言，每項認購 / 定期供款 / 額外供款或轉入一項投資選擇會被視為一次投資。

III. Investment Horizon 投資年期

5. When do you expect to start withdrawing your investment? 您預計何時開始提取投資款項?

☐ Over 20 years 多於20年 (5)	☐ 11 – 20 years 11– 20 年 (4)	☐ 6 – 10 years 6 – 10 年 (3)	☐ 1 – 5 years 1 – 5 年 (2)	☐ Less than 1 year 少於 1 年 (1)

Section 1: Risk Profile 第一部分：風險評估

Please complete the RPQ, and "✔" where appropriate 請填妥本問卷，及在適當位置加上"✔"

IV. Investment Objective 投資目標

6. What is your current objective for investment? 您現時之投資目標是?

- ☐ Maximize capital growth as soon as possible 以最短時間，爭取最高回報 (5)
- ☐ Stable, balanced income and capital growth 穩定、平衡收入與資本增長 (3)
- ☐ Capital preservation with a return similar to bank deposit rate 保本及賺取相約於銀行存款的回報 (1)
- ☐ Gradual long-term capital growth 資本長期地逐漸增長 (4)
- ☐ Earn a return which is slightly above bank deposit 賺取略高於銀行存款的回報 (2)

V. Risk Tolerance 風險承受能力

7. Which of the following statement could best describe your attitude towards investment risk? 以下哪一段句子最能反映您對投資風險的態度?

- ☐ I never consider risks, as I aim to maximize returns 我不會考慮風險，務求得到最高回報 (5)
- ☐ I am trying to strike a balance between risks and returns 我會平衡風險與回報 (3)
- ☐ I am risk adverse and don't want to take any risks 我不願意承受任何風險 (1)
- ☐ I am willing to accept more risks, as I aim for more returns 我願意承受較高的風險，以換取更高回報 (4)
- ☐ I will try to avoid risks but minor ones are still acceptable 我會盡量回避風險，但仍可承受較低的波動 (2)

8. Generally, the higher the expected return the higher price fluctuation may be involved. What level of annualized price fluctuation would you generally be comfortable with? 一般而言，預期較高回報，亦會涉及較高的價格波幅。您可以接受以下哪個年度價格波幅?

- ☐ Price fluctuates between -20% and +20% 價格波幅介乎 -20% 與 +20% 之間 (5)
- ☐ Price fluctuates between -10% and+ 10% 價格波幅介乎 -10% 與 +10% 之間 (3)
- ☐ No price fluctuation 沒有價格波幅 (1)
- ☐ Price fluctuates between -15% and +15% 價格波幅介乎 -15% 與 +15% 之間 (4)
- ☐ Price fluctuates between -5% and +5% 價格波幅介乎 -5% 與 +5% 之間 (2)

9. You invested $1,000,000, and the value of investment fell dramatically in a short period of time, would you: 如果您投資了 $1,000,000，但在短時間內價格大幅下跌，您會：

- ☐ I will adequately invest more to lower the average cost of my investment. 我將適量增持以降低平均投資成本。(5)
- ☐ I will sell a small part of the investment, and hold the remaining investment in the expectation of growth over the long term. 我將出售小部份投資，並持有餘下的投資及觀望其長線增長。 (3)
- ☐ I will sell the investment immediately to prevent further losses. 我將立即出售投資以防止進一步的損失。 (1)
- ☐ I will hold the investment in the expectation of growth over the long term. 我將繼續持有現有投資並觀望其長線增長。 (4)
- ☐ I will sell a large part of the investment and hold the remaining investment in the expectation of growth over the long term. 我將出售大部份投資，並持有餘下的投資及觀望其長線增長。 (2)

VI. Financial Circumstances 財務狀況

10. I anticipate that my disposable income, savings and/or investments such as income funds, other than any benefits of the ILAS policy including any non-guaranteed cash dividend from investment choice(s), are sufficient to serve as my source of income. 我預計我的可支配收入，儲蓄和 / 或如收益基金等投資（不計算投連壽險產品的任何收入，包括來自投資選擇的任何非保證現金紅利）足以作為我的收入來源。

☐ Yes 是 ☐ No 否

11. What portion of your liquid net worth is reserved for this investment? Note: Liquid net worth excludes real estate, cars, and insurance, etc., as they are not readily to be turned into cash. 您用作此投資的金額，只佔您的流動淨資產多少個百分比？注意： 流動淨資產並不包括物業、車輛及保險等不容易轉化為現金的資產。

☐ Less than 20% 少於20% (5) ☐ 21% – 40% (4) ☐ 41% - 60% (3) ☐ 61% – 80% (2) ☐ 81% or above 81% 或以上 (1)

12. How many months of your household expenses could be covered by your liquid net worth to meet unforeseen events? Note: Liquid net worth excludes real estate, cars, and insurance, etc., as they are not readily to be turned into cash. 您現時的流動淨資產足夠應付多少個月的日常家庭開支，以面對突如其來的情況? 注意： 流動淨資產並不包括物業、車輛及保險等不容易轉化為現金的資產。

☐ More than 12 months 多於12 個月 (5) ☐ 6 – 12 months 6 – 12 個 (4) ☐ 3 – 6 months 3 – 6 個月 (3) ☐ Less than 3 months 少於3 個月 (2) ☐ None 沒有 (1)

Section 1: Risk Profile 第一部分：風險評估

Please complete the RPQ, and "✔" where appropriate 請填妥本問卷，及在適當位置加上"✔"

13. How do you expect your future monthly investable amount over the next five years?
    您預計未來五年每月可投資之金額會怎樣?

- ☐ Expect the monthly investable amount will increase sharply
  預計每月可投資之金額會急升 (5)
- ☐ Expect the monthly investable amount will increase gradually, and the rate of increase would be steady
  預計每月可投資之金額會逐漸及平穩地上升 (3)
- ☐ Expect the monthly investable amount will decrease
  預計每月可投資之金額會減少 (1)
- ☐ Expect the monthly investable amount will increase gradually, and the rate of increase would be accelerating
  預計每月可投資之金額會逐漸上升，並且上升幅度會愈來愈大 (4)
- ☐ Expect the monthly investable amount will remain unchanged
  預計每月可投資之金額會維持不變 (2)

Total Score
總分數:

Risk Profile Analysis 風險評估分析

Total Score 總分數	12-21	22-30	31-40	41-50	51-60
Risk Tolerance Level 風險承受級別	Low 低	Low-to-Medium 低至中	Medium 中	Medium-to-High 中至高	High 高
Investor Characteristics 投資者特徵	**Conservative** **保守型** An investor who is risk-averse and to whom capital preservation is very important. 投資者對風險採取比較保守的態度及重視保存資本。	**Stable** **穩健型** An investor who would like to have the capital gain potential, and he/she understands he/she needs to take a low to medium level of risk in respect of the capital invested. 投資者喜愛有資本增值的潛力的投資，同時亦明白到需要承擔低至中度風險。	**Balance** **平衡型** An investor who is willing to accept a medium level of risk. 投資者願意承擔中等程度的風險。	**Growth** **增長型** An investor who would like to have greater capital gain potential, and he/she understands that he/she needs to take a high level of risk. 投資者喜愛有較大資本增值潛力的投資，同時亦明白到需要承擔高程度的風險。	**Aggressive** **進取型** An investor who would like to have significant capital gain, and he/she understands that he/she needs to take a very high level of risk in respect of the capital invested. 投資者喜愛有可觀資本增值的投資，同時亦明白到要承擔相當高的風險。

If you choose to deviate in any respect from the Risk Profile Questionnaire process, you must indicate your reason(s) in writing.
如您選擇偏離任何關於「風險承擔能力問卷」過程，您必須書面詳述有關原因。

(Policy owner(s) must complete explanation in own handwriting in this box. 保單持有人必須在此親筆填寫解釋。)

Section 2: Personal Information Collection Statement 第二部份 – 個人資料收集聲明

I/We, the Policy Owner of the above policy, hereby jointly and severally declare that:
本人 / 吾等，上述保單的保單持有，在此共同及分別確認：

- I/We confirm that I/we have read and understood the Personal Information Collection Statement ("PICS") of Heng An Standard Life (Asia) Limited ("the Company"). I/We agree that the Company may collect, use, store, process, disclose, transfer and otherwise share our personal data in accordance with the terms of the PICS. For the latest version of PICS, it can be downloaded from the Company website (https://www.hengansl.com.hk) or available upon request.
  本人 / 吾等確認已閱讀及明白恒安標準人壽 (亞洲) 有限公司 (「貴公司」) 的收集個人資料聲明(「本聲明」)。本人 / 吾等確認已經閱讀並且明白本聲明。吾等同意貴公司可 依照本聲明的條款收集、使用、儲存、處理、披露、轉移及以其他方式分用吾等的個人資料。有關最新版本的收集個人資料聲明，可於貴公司網站上 (https:// www.hengansl.com.hk) 下載或向恒安標準人壽 (亞洲) 有限公司索取。

- I/We hereby declare that any personal data provided by me/us to the Company (whether by way of this application or otherwise) which is in relation to a third party not being myself/ourselves has been obtained by me/us in compliance with the Personal Data (Privacy) Ordinance, and the relevant third party has explicitly agreed to the disclosure of his/her personal data to the Company for the purposes set out in the PICS. I/We agree to indemnify and hold harmless the Company against all losses, liability and costs which the Company may incur or suffer as a result of, or in connection with, any breach of my/our declaration contained in this paragraph.
  本人/吾等謹此聲明，任何由本人/吾等向貴公司提供 (不論是透過本申請或其他方式提供) 有關第三者 (而非本人/吾等) 的個人資料乃是以符合個人資料 (私 隱) 條例規定的手法取得，而有關第三者已明確同意向貴公司披露其個人資料作「個人資料收集聲明」所述的用途。本人 / 吾等同意彌償及確保貴公司免受因 本人 / 吾等違反於本文下的聲明而產生或引致的任何損失、責任或費用。

Section 3: Declaration and Acknowledgement 第三部分：聲明及確認

I/We declare and acknowledge that:
本人 / 吾等聲明及確認：

- I/We have read, understand and agreed with the information as stated in the Important Note.
  本人 / 吾等已閱讀、了解及同意重要事項內容。
- All the answers to this RPQ are true and accurate and are given according to my/our current situation. I/We understand that the provision of information in this RPQ is voluntary for the purposes of updating my/our risk profile on record with the Company. If I/we fail to provide the information, my/our risk profile will not be updated.
  有關本問卷之所有答案均為真實及準確，並根據本人 / 吾等的現況作答。本人/ 吾等明白於本問卷上提供之資料作為本人/ 吾等在本公司的風險取向的記錄更新乃屬自願。倘本人/ 吾等未能提供有關資料，本人/ 吾等的風險取向將不獲更新。
- This RPQ is intended only to help me/us understand my/our risk appetite. It does not constitute any investment advice and should not be regarded as a recommendation, or an offer to sell or a solicitation to buy any investment products or services.
  本問卷僅用以協助本人 / 吾等明白本人 / 吾等的可承受的風險水平，並不構成投資建議及不應視為任何投資產品或服務之促銷或銷售的建議或邀約
- In case of any substantial changes of information provided in this RPQ, I/we understand I/we should inform the Company and submit a new RPQ as soon as possible.
  若本問卷上填報的資料有重大改變，本人/ 吾等明白需要盡快通知貴公司及提交一份新問卷。
- I/We have read, understood and agreed with the Personal Information Collection Statement attached in this form.
  本人/ 吾等已閱讀、理解並同意本表格所附的個人資料收集聲明。

Disclaimer 聲明：

- Investment involves risks. Past performance is not indicative of future performance.
  投資涉及風險，過往的投資表現對未來的投資表現並無指導性意義。
- If you have any doubt, you are highly recommended to seek independent professional advice.
  如您有任何疑問，懇請您諮詢獨立專業意見。
- For details of the risks associated with the investment products/underlying funds, please refer to the relevant offering documents.
  有關投資產品 / 相連基金之附帶風險的詳情，請參閱相關銷售文件。

Signature of First Policy Owner
第一保單持有人簽署

Date of Signature (DD/MM/YY)
簽署日期 (日 / 月 / 年)

Signature of Second Policy Owner (if any)
第二保單持有人簽署 (如適用)

Date of Signature (DD/MM/YY)
簽署日期 (日 / 月 / 年)

Verified by Licensed Insurance Intermediary (if applicable)
由持牌保險中介人核對 (如適用)

Name and signature of Licensed Insurance Intermediary
持牌保險中介人之姓名及簽署

Date of Signature (DD/MM/YY)
簽署日期 (日 / 月 / 年)

Name and stamp of Company of the Licensed Insurance Intermediary
持牌保險中介人的公司名稱及蓋章

Heng An Standard Life (Asia) Limited (662679) is registered in Hong Kong at 12/F., Lincoln House, Taikoo Place, 979 King's Road, Quarry Bay, Hong Kong. Authorised by the Insurance Authority of Hong Kong to write Class A, Class C and Class I long term business in Hong Kong.
恒安標準人壽 (亞洲) 有限公司 (662679) 的註冊公司地址為香港鰂魚涌英皇道979號太古坊林肯大廈12樓，其已獲香港的保險業監管局授權於香港承保 A 類、C 類及 I 類之長期業務。
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