



## Change in Contribution Form (Applicable to both Single Contribution and Regular Investment Plan) 更改供款表格 (適用於單一投資供款及定期投資計劃)

### Filling in this form 請填妥下列表格

Please fill in this service form and return the original to 12/F, Lincoln House, Taikoo Place, 979 King's Road, Quarry Bay, Hong Kong. The change request shall be made to the policy as stated below. If you have any enquiries, please contact our Customer Service Department on (852) 2169 0300. 請填妥下列表格，並將正本寄回香港鰂魚涌英皇道 979 號太古坊林肯大廈 12 樓。公司將按要求於下列保單作出更改。若閣下有任何查詢，請致電公司之客戶服務部 (852) 2169 0300。

For investment choice information, please refer to the Investment Choices Brochure. 有關投資選擇資料，請參閱相關的投資選擇刊物。

#### Important Information 重要資訊

Starting from 1 January 2018, the Insurance Authority of Hong Kong will impose by law a levy on the premium / contribution payment(s) of the policy payable by the policyholder(s). The levy is payable to the Insurance Authority and does not form part, and is independent, of any fees or charges payable by the policyholder(s) under their policy.

由 2018 年 1 月 1 日起，香港保險業監管局將按照法例就投保人的保單保費 / 供款實施徵費。有關徵費須由投保人向保險業監管局繳付，該徵費並不構成投保人於保單應付的任何收費或費用的一部分，且為獨立於保單應付的任何收費或費用。

Policy Number  
保單編號

Name of First Policy Owner  
第一保單持有人姓名

Name of First Life Insured  
第一受保人姓名

Name of Second Policy Owner (if applicable)  
第二保單持有人姓名 (如適用)

Name of Second Life Insured (if applicable)  
第二受保人姓名 (如適用)

Please provide the following information of the first policy owner:  
請第一保單持有人提供下列資料：

Occupation  
職業

Industry  
行業

Job duties  
工作職能

Please provide the following information of the second policy owner (if applicable):  
請第二保單持有人提供下列資料 (如適用)：

Occupation  
職業

Industry  
行業

Job duties  
工作職能

### 1. Decrease of Regular Contribution 減低定期供款

Please complete this section if you wish to apply for a reduction of the regular contribution. 如需減低定期供款，請填寫本部份。

#### Reason(s) of regular contribution reduction 申請減低定期供款的理由

☐

1. Satisfactory Investment Returns  
投資回報理想

☐

2. Other Investment Purpose  
其他投資用途

☐

3. Purchase Other Insurance Products  
購買其他保險產品

☐

4. Other Financial Needs  
其他財務需要

☐

5. Dissatisfied with Broker Services  
經紀服務未如理想

☐

6. Others, please specify  
其他，請註明

Decrease Regular Contribution Amount to  
定期供款金額減低至：

\$

(contribution currency same as policy currency)  
(供款貨幣與保單貨幣相同)



### 3. Bank Account Details for Cash Dividend 現金股息的銀行帳戶資料

Please provide HKD bank account details from a Hong Kong registered bank if you select an Investment Choice with an objective to distribute cash dividends on a regular basis. This bank account will be used for cash dividend distribution (if any).

如閣下選擇以定期派發現金股息為目的之投資選擇，請提供在香港註冊銀行的港元帳戶資料，用以安排派發現金股息（如有）。

English Name of Bank Account Holder  
(Name Must Match with Bank Record)\*

銀行帳戶持有人的英文姓名  
(須與銀行紀錄之姓名相同)\*

English Name of Bank  
銀行的英文名稱

Bank Account Name  
銀行帳戶號碼

(bank code + branch code + bank account number)  
(銀行編號 + 分行編號 + 銀行帳戶號碼)

\* The bank account holder must be the proposed policy owner  
銀行帳戶持有人必須是準保單持有人

### 4. Declaration and Signature 聲明及簽署

1. I/We understand that should there be a reduction in contribution or premium to my/our Policy, I/we may suffer a significant loss of principal and/or any bonuses awarded, and the surrender value and death benefit of my/our Policy may be significantly less than the contribution I/we paid under the Policy. Conversely, I/we understand that if I/we make additional regular contribution to my/our Policy, each such additional regular contribution will have an individual separate Initial Contribution Period. I/We understand that the full descriptions of these features have been provided in the relevant Product Brochure and/or Product Key Facts Statement.  
本人 / 吾等明白，假如本人 / 吾等就保單減少供款 / 保費，本人 / 吾等有可能因此蒙受本金及 / 或任何所得獎賞的重大損失，並且本人 / 吾等在保單下的退保價值及身故賠償或會大幅少於本人 / 吾等在保單下繳付之保費。相反地，本人 / 吾等明白假如本人 / 吾等就保單作出額外定期供款，則每筆額外定期供款將各自有其獨立的最初供款期。本人 / 吾等明白於主要銷售刊物及 / 或產品資料概要中已載有關於該等特點較詳盡的描述。
2. I/We fully understand the nature, structure and risks of the Policy, the insurance and investment elements of the Policy and the fees and charges at both the Policy level and the underlying investment level.  
本人 / 吾等完全明白本保單的性質、結構及風險、本保單的保險及投資元素及在保單層面及相連投資層面所收取的費用及收費。
3. I/We confirm that: (a) if I/we have selected to pay regular contributions under the Policy, I/we have the ability to make such payments throughout the contribution payment terms; and (b) I/we have sufficient net worth to be able to assume the risks and bear the potential losses of investing in the Policy. I/We have made my/our own determination that the investment is consistent with my investment horizon and investment objectives. At my/our own discretion, I/we confirm that I/we wish to proceed with my/our investment in the Policy;  
本人 / 吾等確認：(a) 若本人 / 吾等選擇以定期供款模式繳交本保單的供款，本人 / 吾等在整個供款年期均有能力繳付有關定期供款；及 (b) 本人 / 吾等具有充足的資產淨值承擔投資於本保單的風險及潛在虧損。本人 / 吾等確定根據本人 / 吾等的判斷，此投資與本人 / 吾等的投資期限及投資目標相符。本人 / 吾等確認並按本人 / 吾等的意願擬進行本人 / 吾等於本保單下的投資；
4. With respect to the investment choices made available by Heng An Standard Life (Asia) Limited ("the Company") for the allocation of my/our premiums under the Policy after deduction of all applicable fees and charges ("Investment Choices"), I/we further understand, acknowledge and agree as follows:  
就貴公司於本保單所提出的投資選擇（“投資選擇”）而分配本人於扣除任何適用收費及費用後的保費而言，本人 / 吾等明白、承認和同意以下事項：
  - (i) Any instruction for the subscription, switching, conversion or redemption of the Investment Choices shall be in such quantity and value as may be acceptable to the Company in its sole discretion. I/We further acknowledge that any Cash Account, if it is a product feature of the Policy, is not considered as an Investment Choice under it;  
任何基金的認購、轉換、兌換或贖回指令將以貴公司以其絕對酌情權所決定的數量和價值執行。本人 / 吾等進一步確認任何現金戶口（如為本保單的產品特色之一），將不被視為一項基金；
  - (ii) As each of the Investment Choices is linked to an external underlying fund, any instruction for the subscription, switching, conversion or redemption of an Investment Choice will be effected subject to any restrictions, limitations, fees and charges and other requirements relating to the subscription, switching, conversion or redemption of the relevant underlying fund;  
各項基金均與外部相連基金掛鈎。任何基金的認購、轉換、兌換或贖回指令將受有關相連基金就其認購、轉換、兌換或贖回的禁止、限制、收費及費用和其他要求所影響；
  - (iii) Each Investment Choice has its own investment objective, fee structure and risk factors and some of them may invest in whole or in part in derivatives or structured products, hence not all the Investment Choices are suitable for the allocation of my Investment Contents. Before I/we give any instruction for the subscription, switching, conversion or redemption of any Investment Choice, I/we will evaluate my/our own financial situation, risk tolerance level and will seek professional advice where necessary;  
各項基金均有其投資目標、收費模式和風險因素。部份基金可能將全部或部份投資金額投資於衍生產品或結構性產品，故非所有基金均適合予以分配本人 / 吾等的投資金額。在發出任何認購、轉換、兌換或贖回指令前，本人 / 吾等將衡量自身的財務狀況、風險承受能力及尋求專業意見（如需要）；
  - (iv) Without limiting the generality of the foregoing, the Company reserves the right to reject, suspend or defer any instruction to subscribe for, switch, convert or redeem any Investment Choice, in such manner and to the extent necessary, as determined by the Company, to comply with any restrictions, limitations or other requirements relating to the subscription, switching, conversion or redemption (including any restrictions or limitations associated with excessive trading, short term trading or market timing) of the relevant underlying fund;  
在不限制前述的確認下，貴公司保留權利以貴公司認為必須的方式和程度拒絕、暫停或押後任何認購、轉換、兌換或贖回任何基金的指令以符合任何有關相連基金就其認購、轉換、兌換或贖回的禁止、限制或其他要求（包括就任何禁止或限制過度交易、短線交易或選時交易）；
  - (v) Without limiting the generality of the foregoing, the Company may deduct from an Investment Choice any amounts to cover any fees, charges or expenses (including any fees and charges associated with excessive trading or short term trading) incurred by the Company in connection with the subscription, switching, conversion or redemption of the relevant underlying fund;  
在不限制前文下，貴公司可從基金中扣除任何款額以支付貴公司就任何與認購、轉換、兌換或贖回有關相連基金相關所招致的費用、收費或開支（包括就任何過度交易或短線交易有關費用或開支）；
  - (vi) The restrictions, limitations, fees and charges and other requirements relating to the subscription, switching, conversion or redemption of the underlying funds are set out in the offering documents, prospectuses and constitutive documents of the relevant underlying funds, and I am/we are deemed to have read and understood such offering documents, prospectuses and constitutive documents before giving any instruction to the Company for the subscription, switching, conversion or redemption of Investment Choices;  
相連基金的限制、局限、收費和費用及和其他有關認購、轉換、兌換和贖回相連基金的要求均在其銷售文件、招股說明書及組成文件中列明。本人 / 吾等在向貴公司就任何基金發出認購、轉換、兌換或贖回指令前將被視作已經參閱及明白該等銷售文件、招股說明書及組成文件的內容；

## 4. Declaration and Signature 聲明及簽署

- (vii) The Company shall not in any event be liable to me/us for any losses, damages or expenses whatsoever arising out of or in connection with any failure or delay in processing any instruction for the subscription, switching, conversion or redemption of Investment Choices; and  
貴公司在任何情況下將不會就任何基金的認購、轉換、兌換或贖回指令被延遲執行或不能執行而產生或與其有關的任何損失，損害或費用向本人 / 吾等承擔任何責任；及
- (viii) Where there is a switch of investments or funds, the proceeds from the switch-out Fund will first be converted to the policy currency using exchange rates determined by the Company. I/We acknowledge and agree that I/we shall bear all the currency exchange spread and risks associated with such currency conversions which have been explained to me/us. I/We further acknowledge that I am / we are aware that the currency exchange spread will be applied if the currency exchange involves non-HKD transactions and that the spread will be reviewed regularly and could go up as well as down.  
若於基金之間轉換投資，基金所轉出的資金或款項將先以貴公司釐定之兌換率折算的保單貨幣計算。本人 / 吾等確認及同意本人 / 吾等須承擔已向本人 / 吾等解釋的有關貨幣折算所涉及的貨幣匯兌差價及風險。本人 / 吾等進一步確認已清楚明白如涉及非港元貨幣匯兌，貨幣匯兌差價將被應用，以及貨幣匯兌差價將會被定期審查，並可能上漲和下跌。

## 5. Personal Information Collection Statement 個人資料收集聲明

I/We confirm that I/we have read and understood the Company's Personal Information Collection Statement (PICS) made available on the company's website : [www.hengansl.com.hk](http://www.hengansl.com.hk) > Legal and Privacy Statement > Privacy Statement > Personal Information Collection Statement. By completing and returning this form, I/we declare and agree that the Company may use my/our personal data in accordance with the PICS, including transferring my/our personal data to the transferee(s) (in or outside Hong Kong) for direct marketing purposes. I/We understand that I/we have the right to refuse such use and transfer by notifying the company by email to [cs@hengansl.com.hk](mailto:cs@hengansl.com.hk) or writing to the company (address can be found on the last page of this form).

本人 / 吾等確認本人 / 吾等已閱讀及明白載於貴公司網上 [www.hengansl.com.hk](http://www.hengansl.com.hk) > Legal and Privacy Statement > Privacy Statement > Personal Information Collection Statement 個人資料收集聲明。透過填妥及交回此表格，本人 / 吾等聲明及同意貴公司可按照個人資料收集聲明使用及轉交本人 / 吾等的個人資料予不論在本地或海外的受讓方以作直接促銷用途。本人 / 吾等理解本人 / 吾等有權透過電郵至 [cs@hengansl.com.hk](mailto:cs@hengansl.com.hk) 或寫信至貴公司 (地址可在表格最後一頁找到) 聯絡貴公司以拒絕有關的使用及轉交行為。

## 6. Foreign Tax Reporting and Withholding Obligations Statement ("Tax Obligations Statement") 外地稅務呈報 / 稅務責任聲明 (「稅務責任聲明」)

### (a) Provision of information 提供資料

- (i) I/We agree to provide the Company with the Personal Information of myself/ourselves and, where reasonably required by the Company, of any other Consenting Person in such manner, in such form and within such time, as the Company may from time to time require.  
本人 / 吾等同意向公司提供本人 / 吾等的個人資料，亦會應公司的合理要求，按公司不時要求的方式、形式及時間向公司提供其他同意人士的個人資料。
- (ii) Where there is any change or addition to the Personal Information of myself, and, where applicable, any other Consenting Person, I/we agree to update the Company promptly (and in any event no later than 31 days of the change or addition) of the change or addition.  
倘本人 / 吾等及任何同意人士 (倘適用) 的個人資料有任何更改或增加，本人 / 吾等同意當有更改或增加會盡快 (無論如何不遲於更改或增加後的 31 天) 通知公司有關的更改或增加。
- (iii) I/We agree that I/we shall, and, where applicable, shall procure such other Consenting Person(s) to, complete and sign such documents and do such things, as the Company may reasonably require from time to time for the purposes of ensuring the Company's compliance with the Compliance Obligations.  
本人 / 吾等同意會應公司不時合理的要求，自行及 (倘適用) 促使有關的其他同意人士填妥及簽署有關文件及辦理有關事宜，以確保公司遵守合規責任。
- (iv) I/We agree that the Company may directly require any other Consenting Persons to provide or confirm accuracy of their Personal Information without involving me/us if the Company reasonably considers it to be appropriate.  
本人 / 吾等同意，倘公司有理由認為恰當，毋須通過本人 / 吾等直接要求其他同意人士提供其個人資料或確認個人資料是否準確。

### (b) Disclosure of information 資料披露

- (i) I/We agree that the Company and/or any other members of the Company's group may disclose the Tax Information of myself/ourselves and any other Consenting Person(s) to any government or tax authority in any jurisdiction for the purpose of ensuring compliance with Compliance Obligations (including but not limited to obligations under the laws, regulations and international agreements for the implementation of automatic exchange of financial account information ("AEOI") and the U.S. Foreign Account Tax Compliance Act ("FATCA")) on the part of the Company or on the part of the Company's group.  
本人 / 吾等同意公司及 / 或公司集團任何成員可向任何司法管轄區的政府或稅務當局披露本人 / 吾等及任何同意人士的稅務資料，以確保公司或公司集團遵守合規責任 (包括但不限於任何實施的自動交換財務帳戶資料 (「自動交換資料」) 和美國海外帳戶稅收合規法案 (「合規法案」) 的法律、法規及國際協定)。
- (ii) I/We hereby waive, and, where reasonably required by the Company, agree to procure any other Consenting Person(s) to waive, any applicable restrictions which would otherwise hinder the ability of the Company and/or any other members of the Company's group to disclose Tax Information in the manner as described in this paragraph 7(b) of the Tax Obligations Statement (or in the relevant policy provision relating to foreign tax reporting and withholding obligations).  
本人 / 吾等謹此放棄並 (倘公司合理要求) 同意促使其他同意人士放棄可能妨礙公司及 / 或 [公司集團] 其他成員按稅務責任聲明第 7(b) 段 (或有關外地稅務呈報或稅務責任的相關保單條文) 所述方式披露稅務資料的任何相關限制。

### (c) Failure to Provide Information 無法提供資料

I/We agree that:  
本人 / 吾等同意：

- (i) where I/we fail to comply with my/our obligations under paragraph 7(a) of the Tax Obligations Statement; or  
倘若本人 / 吾等不遵守稅務責任聲明第 7(a) 段所載本人 / 吾等的責任；或
- (ii) where any of the other Consenting Persons fails to comply with the Company's requirements described in paragraph 7(a)(iv) or 7(b)(iii) of the Tax Obligations Statement; or  
倘若其他同意人士不遵守稅務責任聲明第 7(a)(iv) 段或第 7(b)(iii) 段所述貴公司的要求；或
- (iii) where the Personal Information (regardless of whether it is in relation to me/us or any other Consenting Person) is inaccurate, incomplete or not promptly updated; or  
倘若個人資料 (不論是否與本人 / 吾等或任何其他同意人士有關) 不準確、不完整或未有及時更新；或
- (iv) for whatever reason the Company and/or any other members of the Company's group is prevented (under Hong Kong law or otherwise) from making the disclosure of the Tax Information of myself/ourselves and/or any other Consenting Person(s) to the relevant government or tax authorities in the relevant jurisdiction,  
公司及 / 或 [公司集團] 任何其他成員不論任何原因 (根據香港法律或其他原因) 遭禁止向相關司法管轄區的相關政府或稅務當局披露本人 / 吾等及 / 或任何其他同意人士的稅務資料，



## 4. Declaration and Signature 聲明及簽署

the Company may take one or more of the following actions at any time:

公司可按其需要隨時採取以下一項或多項行動：

- (I) deduct from or withhold part of any amounts payable under the Policy;  
扣減或不予支付任何保單應付款項；
- (II) terminate the Policy (in which case, the Company will pay me/us the Policy Account Value less any applicable fees and charges and less any withholding or deductions required pursuant to the Compliance Obligations); and  
終止保單 (在此情況下，公司會向本人 / 吾等支付經扣減任何相關費用及收費和根據合規責任所指定的任何不予支付或扣減款項後的保單賬戶價值)；及
- (III) provide (whether before or after the termination of the Policy) the Tax Information relating to me/us and/or any other Consenting Persons to such government or tax authority(ies) in any jurisdiction, as may be required for the Company to ensure its compliance with the Compliance Obligations.  
向任何司法權區的相關政府或稅務當局提供 (不論在保單終止之前或之後) 有關本人 / 吾等及 / 或任何其他同意人士的稅務資料，如公司按其需要以確保其遵守合規責任。

### (d) Confirmations

確認

I/We confirm and agree that:

本人 / 吾等確認並同意：

- (i) any agreement, waiver, confirmations given in, or to be given pursuant to, the Tax Obligations Statement or the relevant policy provision relating to foreign tax reporting and withholding obligations are irrevocable;  
根據稅務責任聲明或有關外地稅務呈報或稅務責任的相關保單條文作出的任何協議、放棄及確認均不可撤銷；
- (ii) neither the Company nor any member of the Company's group shall be liable for any costs or loss that I/we (or any other Consenting Persons) may incur because of the Company and/or any member of the Company's group taking any actions permitted by or exercising any powers under the Tax Obligations Statement or the relevant policy provision relating to foreign tax reporting and withholding obligations;  
由於公司或恒安標準人壽保險集團任何成員根據稅務責任聲明或有關外地稅務呈報或稅務責任的相關保單條文所容許或授權採取的行動引致本人 / 吾等 (或任何其他同意人士) 蒙受的任何費用或損失，公司或恒安標準人壽保險集團任何成員均毋須負責；
- (iii) I/we must obtain or, as the case may be, have obtained the requisite consent from each Consenting Person for the provision of his/her Tax Information to the Company and the disclosure of any of such Tax Information by the Company and/or any of the Company's affiliates under paragraph 7(b) of the Tax Obligations Statement (or the relevant policy provision relating to foreign tax reporting and withholding obligations);  
本人 / 吾等必須或 (視乎情況而定) 已經取得每位同意人士所需的同意，以提供彼等的稅務資料予公司，而公司及 / 或公司任何聯屬公司可根據稅務責任聲明第 7(b) 段 (或有關外地稅務呈報或稅務責任的相關保單條文) 披露任何該等稅務資料；
- (iv) I/we must inform each Consenting Person of the Company's powers under the Tax Obligations Statement (or the relevant policy provision relating to foreign tax reporting and withholding obligations);  
本人 / 吾等必須將稅務責任聲明 (及有關外地稅務呈報或稅務責任的相關保單條文) 所載公司的權力告知每位同意人士；
- (v) the Tax Obligations Statement (and the relevant policy provision relating to foreign tax reporting and withholding obligations) are without prejudice, and in addition, to any of the Company's rights or powers under any other policy provisions or this application form; and  
稅務責任聲明 (及有關外地稅務呈報或稅務責任的相關保單條文) 並不影響任何其他保單條文或本申請表格所載公司的權利或權力並屬於以外的權力；及
- (vi) where there is any withdrawal or payment under the Tax Obligations Statement (or the relevant policy provision relating to foreign tax reporting and withholding obligations) for any reason, the withdrawal amount or payment amount will at all times be subject to the exercise of the Company's powers under paragraph 7(c)(I) and (II) of the Tax Obligations Statement.  
無論任何原因凡有稅務責任聲明 (或有關外地稅務呈報及扣稅責任的相關保單條文) 所指的任何提款或付款，提款金額或付款金額均任何時間須受限於稅務責任聲明第 7(c)(I) 及 (II) 段所述公司權力的行使。
- (vii) the Tax Obligations Statement shall form an integral part of the Policy.  
稅務責任聲明即屬保單的一部分。

7. If there is any inconsistency between the English and Chinese versions of this Statement, the English version shall prevail.

中英文版本如有歧異，概以英文版為準。

8. I/We hereby declare that any personal information of third parties provided by me/us to the Company (whether provided under this application or otherwise provided) in relation to this application has been obtained by me/us in compliance with the PDPO and the relevant third party has agreed to the disclosure of his/her personal information to the Company in relation to this application for the purposes as set out in this personal information collection statement. I/We agree to indemnify and hold harmless, on demand, the Company against all losses, liabilities and costs which the Company may incur arising out of, or in connection with, any breach of the declaration set forth in this paragraph.

本人 / 吾等特此聲明，由本人 / 吾等就此申請提供予貴公司的任何第三方個人資料 (無論載於此申請書或從其他途徑所提供) 乃由本人 / 吾等在遵守個人資料 (私隱) 條例的情況下獲得，且有關第三方已同意為此等個人資料收集聲明所載之目的就此申請向貴公司提供其個人資料。本人 / 吾等同意應貴公司要求，就貴公司因發生任何違反本條款所載的聲明，而可能招致或與之相關的任何損失、責任及費用，對貴公司作出賠償，並使貴公司免受損害。

9. I/We further acknowledge that I/we have been given sufficient time to seek independent advice (legal, financial or otherwise) in relation to this Application and the declarations made in the above, the Chinese version of the declarations is translated for my/our reference only.

本人 / 吾等進一步確認，本人 / 吾等有充足時間就此申請及上文所作聲明而尋求獨立顧問 (法律、財務或其他) 之意見，本聲明的中文譯本只供本人 / 吾等作參考。

### 10. Commission Disclosure for Brokers under the Prevention of Bribery Ordinance

根據防止賄賂條例對保險經紀佣金的披露

I/We understand, acknowledge and agree that, as a result of my/our purchasing and taking up the policy to be issued by the Company, the Company will pay the authorised insurance broker commission during the continuance of the policy (including renewals), for arranging the said policy. Where the applicant is a body corporate, the authorised person who signs on behalf of the applicant further confirms to the Company that he/she is authorised to do so.

本人 / 吾等明白、確知及同意貴公司會就本人 / 吾等購買及接受其續發的保單，於保險有效期內 (包括續保期) 向負責安排有關保單的獲授權保險經紀支付佣金。假如申請人為法人團體，代表申請人簽署的獲授權人進一步向貴公司確認他 / 她已獲該法人團體如此授權。

4. Declaration and Signature 聲明及簽署

I/We further understand that the above agreement is necessary for the Company to proceed with the application.  
本人 / 吾等亦明白貴公司必須取得本人 / 吾等以上的同意，才可以處理其保險申請。

Are you a resident for tax purposes of any countries or jurisdiction(s) other than Hong Kong, and in respect of such countries or jurisdiction(s) you have not previously provided Heng An Standard Life (Asia) Limited with information about your Tax Identification Number(s)?  
請問閣下是否為除香港以外任何國家或司法管轄區的稅務居民，並且未曾向恒安標準人壽 (亞洲) 有限公司提供有關該國家或司法管轄區的稅務編號？

☐ Yes 是 ☐ No 否

If the answer is yes, you must provide Heng An Standard Life (Asia) Limited a separate "Self-Certification Form."  
如答是，請閣下向恒安標準人壽 (亞洲) 有限公司單獨提交一份「自我證明表格」。

Signature of First Policy Owner 第一保單持有人簽署	Signature of Second Policy Owner (if applicable) 第二保單持有人簽署 (如適用)	Signature of Policy Assignee (for collateral assignment only) (if applicable) 保單受讓人 (只限抵押轉讓) (如適用)
Date of Signature (dd/mm/yy) 簽署日期 (日 / 月 / 年)	Date of Signature (dd/mm/yy) 簽署日期 (日 / 月 / 年)	Date of Signature (dd/mm/yy) 簽署日期 (日 / 月 / 年)

Checklist 檢查表

In order to process effectively, please provide the following document and information with this Change in Contribution Form and tick alongside all the following boxes when completed.  
為了有效地處理此申請，請填妥此表格的有關部份，並連同所需的證明文件一併遞交，以及在完成後於下列空格內填上「✓」號

Increase in Contribution  
增加投資供款

- ☐ 1) Provide information about the policy: (i) Policy number; (ii) Name of Policy Owner(s); and (iii) Name of Life Insured(s)  
請於本表格首頁填妥 (i) 保單號碼、(ii) 保單持有人及 (iii) 受保人姓名
- ☐ 2) Complete Section 1  
請填妥第一部分
- ☐ 3) Complete the Important Facts Statement and Applicant's Declarations ("IFS and AD") of the relevant product and submit together with the duly completed set of Financial Needs Analysis and Risk Profile Questionnaire and this form.  
請填妥相關計劃的重要資料聲明書及投保人聲明書並連同已填妥財務需要分析、風險承擔能力問卷和此保單更改申請表格一併遞交。
- Please find the table below setting out the guidelines in completing the IFS and AD.  
請參照下表並填寫重要資料聲明書及投保人聲明書。

	Important Facts Statement (IFS) 重要資料聲明書	Section I of Applicant's Declarations (AD) 投保人聲明書甲部	Section II of Applicant's Declarations (AD) 投保人聲明書乙部	Section III of Applicant's Declarations (AD) 投保人聲明書丙部
Submitted with Financial Needs Analysis & Risk Profile Questionnaire 遞交「財務需要分析」及「風險承擔能力問卷」				
Single Contribution (for Single Contribution ILAS Plan) 單一投資供款 (適用於單一供款之投連壽險保單)	✓	✓	✓	N/A
Single Contribution (for Regular Contribution ILAS Plan) 單一投資供款 (適用於投連壽險保單)	✓	✓	×	✓
Additional Regular Contribution 額外定期供款	✓	✓	✓	✓

- ☐ 4) Submit HKID / valid passport copy\*  
請提供香港身份證 / 有效的護照副本 \*
- ☐ 5) We reserve the right to request additional information or documentation on source of wealth where we deem necessary.  
我們保留權利要求閣下提供財富來源的證明文件
- ☐ 6) Read the declarations in Section 4. Please sign and date Section 4 by all relevant parties.  
請相關人士閱讀第四部分之聲明並簽署作實
- \* Copy of original supporting documents submitted (including identification proofs) must be properly certified by suitable certifiers as set out in the Anti-Money Laundering and Counter-Terrorist Financing (Financial Institutions) Ordinance. The certifier must (i) state that the copy document is a true copy of the original; (ii) sign and date the copy document (his/her name clearly printed in capitals underneath); and (iii) clearly indicate his / her position or capacity on it.
- \* 根據打擊洗錢及恐怖分子資金籌集 (金融機構) 條例，所有遞交的副本 (包括身份證明) 均需由合適核證人 (例如：香港獲授權保險經紀，公證人) 加簽作實。核證人必須清楚在文件上列明 (i) 該文件為原本之副本、(ii) 核證人簽署及日期 (要清楚列明核證人姓名)，與及 (iii) 清楚列明該核證人之職位。

## 5. Appointment of Third Party Financial Advisory Firm (if Applicable) 委任第三方理財顧問公司 (如適用)

## Part A. For completion by the Proposed Policy Owner(s)

## 甲部分。由準保單持有人填寫

I/We have appointed \_\_\_\_\_ (Type: \_\_\_\_\_ Reg No. \_\_\_\_\_)  
 (Full name of the Third Party Financial Advisory Firm and its registration number under appropriate regulatory body)(“the Firm”) by way of a separate agreement to provide me/us with advisory services (“Advisory Services”) in relation to the investment choice(s) and/or cash account(s) (if applicable) of the policy to be issued under this Application (the “Policy”) and I/we have requested to designate \_\_\_\_\_ (Type: \_\_\_\_\_ Reg No. \_\_\_\_\_)(Full name of the technical representative and his/her registration number under appropriate regulatory body)(the “TR”) to act in person to provide the Advisory Services. In consideration of the Advisory Services, I/we have agreed to pay the Firm an advisory fee (the “Advisory Fee”) as may be specified below. I/We hereby instruct Heng An Standard Life (Asia) Limited (“the Company”) to act in accordance with my/our authorisation(s) below.

本人/吾等透過另行訂立協議以委任 \_\_\_\_\_ (登記編號: \_\_\_\_\_) (第三方理財顧問公司的全稱及其適當規管機構登記類別及編號) (「該公司」) 就根據本申請表發出之保單 (「本保單」) 的相關投資選擇/現金賬戶 (如適用) 的轉換及/或更改向本人/吾等提供顧問服務 (「顧問服務」), 並本人/吾等要求指定 \_\_\_\_\_ (登記編號: \_\_\_\_\_) (第三方理財顧問公司的營業代表全稱及其適當規管機構登記類別及編號) (「營業代表」) 親自給予顧問服務。以顧問服務為代價, 本人/吾等同意向該公司支付下文規定的顧問費 (「顧問費」), 並特此指示恒安標準人壽 (亞洲) 有限公司 (「貴公司」) 按本人/吾等就以下授權行事。

## Authorisation 1: Withdrawal from Policy to pay for Advisory Fee

## 授權1: 從保單中提款以支付顧問費

I/We hereby authorise the Company to withdraw from the Policy an amount equivalent to the Advisory Fee at the annual rate of \_\_\_\_\_ %\* of the aggregate value of its Policy Account every month, and to pay the same to the Firm or its authorised nominee (which is subject to the Company's final approval based on its internal rules and guidelines) on my/our behalf.

\* Note 1: Annual rate of Advisory Fee may not exceed 2% per annum.

本人/吾等授權貴公司每月從保單賬戶的總值中提取相等於其年率 \_\_\_\_\_ %\*作為顧問費的金額, 並代表本人/吾等將該等金額支付予該公司或其授權提名人 (須取得貴公司根據其內部規則和指引作出的最終批准)。

\* 註 1: 顧問費的年率不得超過每年2%。

## Authorisation 2: Change(s) to Investment Choice(s) and/or Cash Account(s)

## 授權2: 更改投資選擇/現金賬戶

I/We hereby authorise the Firm, or if I/we have requested for a TR designation, the TR, to give written instructions (the “Instructions”) on my/our behalf without requiring my/our signatures to the Company for any changes to the present and/or future allocation of units of investment choice(s) and/or value of cash account(s) in relation to the Policy, including any switching in and out of any investment choice(s) and/or cash account(s) or re-directing any regular contributions to any different investment choices and/or cash account(s). I/We agree that the Company shall be entitled to act upon the Instructions given on my/our behalf by the Firm or the TR as the case may be. I/We also agree that:

本人/吾等特此授權該公司或如本人/吾等已有指定營業代表必須為該營業代表代表本人/吾等在無須本人/吾等簽名確認的情況下就保單任何現在或將來的投資選擇及/或現金賬戶 (如適用) 作出更改包括基金轉換或分配任何定期投資組合的更改向貴公司發出書面指示 (「指示」)。本人/吾等同意貴公司有權因應此授權而執行該公司/或其營業代表 (視乎情況而定) 的指示行事。本人/吾等亦同意:

- The Company is not obliged or under any responsibility to review the merit and consequences of the Instructions given on my/our behalf and/or any other instructions directly from me/ us.  
貴公司不需要亦無責任評估該等指示及/或本人/吾等直接發出的其他指示的優點和缺點。
- The Company is entitled to act upon any Instructions which the Company reasonably believes to be validly given by the Firm/the TR but shall not be held responsible for the authenticity of any signatures or Instructions (whether in writing or by electronic means) purported to be given by the Firm/ the TR regardless of any fraud or lack of actual authorisation.  
貴公司有權依照任何貴公司合理相信由該公司/或其營業代表有效發出的指示行事, 且不對聲稱由該公司/或其營業代表提供的簽名或指示 (無論是以書面或電子形式) 的真實性負責, 無論其是否欺騙或未獲正式授權。
- If I/we and the Firm/the TR each give respective instructions to the Company in relation to the Policy, there may be doubt as to which set out instructions precedes the other or prevails over the other in case of conflict. If this happens, the Company may still execute the Instructions and/or my/our instructions in a manner it deems appropriate or may, but are not obliged to, withhold execution of any instructions pending resolution with the Firm/the TR and/or me/us notwithstanding that this may potentially lead to delay and/or loss to be incurred.  
倘若本人/吾等及該公司或其營業代表各自向貴公司發出與保單相關的指示, 其所下達順序可能存在疑問 (或其可能相互抵觸)。若此種情況出現, 貴公司可能仍按其認為適當的方式執行該等指示及/或本人/吾等的指示, 但並無責任暫停執行有關指示以等候該公司/或其營業代表及/或本人/吾等解決有關的指示事宜, 即使這可能導致延遲及/或損失。

Please tick your chosen option: ☐ Authorisation 1 only OR ☐ Authorisations 1 and 2  
 請勾選以下選項: ☐ 僅授權1 或 ☐ 授權1和2

(Please read the above carefully before you choose the right option. You must state the Advisory Fee rate in any case. Please note that in authorising us to pay the Firm or its nominee the Advisory Fee, you are doing so in the knowledge that the Benefit Illustration Document of the Policy which you have signed does not already take into account the Advisory Fee that you have agreed to pay.)

(請在選擇正確的選項之前詳閱上文。在任何情況下閣下均須列明顧問費的比率。請注意, 在授權我們向該公司或其提名人支付顧問費時閣下是在已知道閣下已簽署的利益說明文件並未有考慮閣下已同意支付的顧問費的情況下提出授權的)。

I/We acknowledge that the Company does not and shall not accept any responsibility whatsoever for the quality of the Advisory Services, nor the propriety of any Instructions which is given on my/our behalf by the Firm/the TR, nor the qualification and/or competence of the Firm and/or the TR (e.g. possession of relevant authorisation/registration under the appropriate regulatory body). I/We also confirm and agree that:

本人/吾等承認, 對於顧問服務的質素或該公司及/或其營業代表代表本人/吾等提交的任何指示或該公司及/或其營業代表的資歷及/或能力 (例如持有適當監管機構的相關授權/登記), 貴公司概不負責。本人/吾等亦確認及同意:

- Monthly Withdrawal. At the first dealing day of each policy month, the Company will withdraw from the Policy an amount equivalent to the monthly amount of the Advisory Fee by redeeming the pro rated number of units of each investment choice and by deducting the value of the cash account(s) (if applicable) (in proportion to the value of that investment choice and cash account(s) (if applicable) in Policy Account of the Policy) under the Policy.  
 每月提款。在每個保單月份的首個交易日, 貴公司將透過按比例贖回保單下各投資選擇的單位及扣除現金賬戶 (如適用) 的價值 (按保單賬戶中的有關投資選擇及現金賬戶 (如適用) 價值的比例), 以從保單中提取相等於每月顧問費的金額。

## 5. Appointment of Third Party Financial Advisory Firm (if Applicable) 委任第三方理財顧問公司 (如適用)

- Termination.** My/Our authorisation(s) under this Part A shall continue until being revoked by a notice in writing signed by me/us and sent to the Company's address in Hong Kong or until the Policy is being terminated for whatever reasons, whichever is earlier. Prior to the actual receipt and processing by the Company of any such revocation, the Company shall continue to make the monthly withdrawal for paying to the Firm or its nominee and/or shall continue to execute any Instructions as the case may be.

終止。本人/吾等於甲部分的授權應持續生效，直至本人/吾等以書面通知及發送至貴公司在香港地址撤銷授權事宜或保單在任何情況下失效(以最早者為準)。在貴公司收到及處理此撤銷之前，貴公司會繼續每月提款以向該公司或其提名人支付顧問費，及/或繼續執行發自該公司/或其營業代表的任何指示。
- Company notice.** The Company shall have the right, by giving an immediate written notice to me/us (or to the Firm which shall be binding on me/us), to cease to act on any Instructions after which the Company will only act on the valid instructions given directly by me/us. Prior to such written notice of the Company to me/us (or to the Firm), the Company shall continue to execute any Instructions from the Firm or the TR as the case may be.

公司通知。貴公司有權向本人/吾等(或向該公司，而此對本人/吾等具約束力)發送即時書面通知，以終止依照該公司及/或其營業代表發出的任何指示行事，在此之後，貴公司將僅依照本人/吾等發出的有效指示行事。在貴公司向本人/吾等(或該公司)發送該等書面通知之前，貴公司應繼續執行發自該公司及/或其營業代表的任何指示(視具體情況而定)。
- Loss or liability.** The Company shall not be responsible for any loss or liability to the Policy or to me/us arising from any act, omission, negligence, default, misconduct, breach of laws or regulations and/or fraud of the Firm.

損失或責任。對於該公司及/或其營業代表的任何作為、遺漏、疏忽、違約、違規行為、違反法律法規及/或欺詐而導致保單或本人/吾等承受任何損失或責任，貴公司概不負責。
- Indemnity.** I/We shall indemnify the Company and hold the Company free and harmless from and against all claims, actions, demands, liabilities, damages and proceedings suffered or incurred by the Company, including all costs and expenses, arising from the Company in reliance on, or in execution of, any Instructions given or purportedly given by the Firm/the TR or any act, omission, negligence, default, misconduct, breach of laws or regulations and/or fraud of the Firm/the TR (including but not limited to all legal costs and the cost of defending in any court or proceedings such claim, demand or action against the Company).

彌償。對於貴公司依賴或執行由該公司及/或其營業代表發出或聲稱由該公司及/或其營業代表發出的任何指示，或該公司及/或其營業代表的任何作為、遺漏、疏忽、違約、違規行為、違反法律法規及/或欺詐而導致貴公司蒙受或招致的所有索償、訴訟、要求、責任、損害及法律程序，包括所有成本和開支(包括但不限於所有法律成本以及在任何法院或針對貴公司的索償、要求或訴訟法律程序中作辯護的成本)，本人/吾等應向貴公司作出彌償及使貴公司免受損害。
- The Policy and other terms of the Company.** The terms of this Part A and the acceptance of the Instructions shall at all times be subject to the terms and conditions of the Policy and other terms and conditions as provided by the Company, including but not limited to those relating to investment choices/cash account(s) (if applicable) from time to time.

保單及貴公司的其他條款。甲部分的條款及指示的接受均須在任何時候遵守保單的條款和條件以及貴公司規定的其他條款和條件，包括但不限於隨時生效而與投資選擇/現金賬戶(如適用)相關的條款和條件。

Signature of First Proposed Policy Owner  
第一準保單持有人簽署

Date of Signature (dd/mm/yy)  
簽署日期(日/月/年)

Signature of Second Proposed Policy Owner (if applicable)  
第二準保單持有人簽署(如適用)

Date of Signature (dd/mm/yy)  
簽署日期(日/月/年)



## 5. Appointment of Third Party Financial Advisory Firm (if Applicable) 委任第三方理財顧問公司 (如適用)

## Part B. For completion by the Third Party Financial Advisory Firm and its Authorised Representative

## 乙部分。由第三方理財顧問公司及其獲准代表填寫

I, \_\_\_\_\_ (Type: \_\_\_\_\_ Reg No. \_\_\_\_\_) (Your full name and registration number under appropriate regulatory body) confirm that I, the authorised representative of the Third Party Financial Advisory Firm, have fully explained the contents of Part A to the Proposed Policy Owner(s) in a language which such Proposed Policy Owner(s) understand(s), and also that, if I have been designated by the Proposed Policy Owner(s) as the TR under Part A, I shall use the same signature below to give the Instruction to the Company for change(s) of Investment Choice(s) and/or Cash Account(s) of the Policy in the future.

本人 \_\_\_\_\_ (登記編號: \_\_\_\_\_), (第三方理財顧問公司營業代表的全稱及其適當規管機構登記類別及編號) 確認本人已經以準保單持有人能夠理解的語言向準保單持有人詳細解釋本部分的內容。並如本人如已根據甲部份成為準保單持有人的指定營業代表, 本人日後須使用以下同樣的簽名以就此保單向貴公司給予更改投資選擇/現金賬戶的指示。

Signature by the authorised representative of Third Party Financial Advisory Firm  
第三方理財顧問公司營業代表的簽署

Date of Signature (dd/mm/yy)  
簽署日期 (日/月/年)

We, the Third Party Financial Advisory Firm, have read and agreed the conditions stated in Part A.  
吾等, 即第三方理財顧問公司, 已經閱讀及同意甲部分載列的條件。

We confirm that we and the relevant employees, servants, agents and representatives are competent to provide the Advisory Services and we shall use our best endeavor to act and ensure they shall act competently, honestly and fairly to the Proposed Policy Owner(s). We agree that, for cases without any request for TR designation by the Proposed Policy Owner(s), only persons in the list of authorised signatories supplied by us may give the Instructions to the Company on behalf of the Proposed Policy Owner(s). Should there be any changes to the list from time to time, we shall promptly provide an updated list with the effective date to the Company as soon as practicable.

本公司確認本公司及其營業代表及相關員工、僱員或代理有能力提供顧問服務, 且本公司將盡力行事及確保吾等之相關員工、僱員或代理盡力以稱職及對準保單持有人誠實和公平的方式行事。本公司同意, 只有在被本公司授權簽字的人可不時向沒有指定營業代表的準保單持有人向貴公司發出的有效指示。如本公司之授權名單情況有變化, 本公司在可行範圍內切實盡快向貴公司提交更新名單。

We confirm that we and the relevant employees, servants, agents and representatives, as designated under the Appointment of Third Party Financial Advisory Firm (the "Designated Person(s)") for the purpose of providing investment advisory services to our customers, whom hold or will hold Investment-linked Assurance Scheme (the "ILAS") policies issued or to be issued by HASL Asia, have the capability to provide professional advice in respect of the investment choices of the ILAS products and have received up-to-date trainings on an ongoing basis, in order to comply with the requirements under the Guideline on Financial Needs Analysis (GL30).

本公司確認根據委任第三方理財顧問公司之營業代表及相關員工、僱員或代理 ("指定人"), 為已持有或將持有恒安標準人壽亞洲的投資相連壽險產品的客戶提供投資選擇相關的諮詢服務時, 指定人具有提供專業建議的能力, 並且已經獲得持續的最新培訓, 以符合《財務需要分析指引》(GL30) 的要求。

In case any Designated Person(s) does/do not fulfil the capability and/or training requirement or his/her relationship with us is terminated, we shall immediately notify HASL Asia accordingly and recommend the appointment of the succeeding person to HASL Asia for its confirmation.

如果任何指定人未能符合有關能力和/或培訓要求, 或他/她與我們的關係已經終止, 我們將立即通知恒安標準人壽亞洲, 並建議任命繼任人予恒安標準人壽亞洲以確認。

We confirm that we and those employees, servants, agents and representatives have complied with all relevant laws and regulations in Hong Kong where we and those employees, servants, agents and representatives are registered under the appropriate regulatory body(ies) to conduct the activities pursuant to Part A above. We shall immediately notify the Company of any changes to our/their registration(s) and any disciplinary action taken against us/them should any of these arise.

本公司確認本公司及其相關員工、僱員或代理已遵守香港的所有有關法律及法規, 且已在香港的適當監管機構註冊以進行根據本表格甲部分的業務。如吾等之註冊情況有變或出現針對我們的任何紀律處分, 吾等將立即通知貴公司。

For and on behalf of the Third Party Financial Advisory Firm  
代表第三方理財顧問公司

Date of Signature (dd/mm/yy)  
簽署日期 (日/月/年)

Name of Authorised Signatories (Full Name in printed form)  
第三方理財顧問公司授權人士姓名 (請以正楷填寫)

Company Name and Stamp  
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。