

Health Statement Declaration Form 健康資料聲明書

Filling in this form 請填妥下列表格

Please ensure that you disclose all material facts within our knowledge in filling in this form, as failure to do so may result in the insurance being adjusted or even declared void and Heng An Standard Life (Asia) Limited ("the Company") shall not be liable for claims unless all material facts have been declared in writing. "Material Facts" is a fact which would have been likely to influence the Company decision to offer this policy or affect cover provided or the scheduled premium which the Company would charge for this policy. If you have any doubt as to whether certain facts are material, these facts should be disclosed. This form shall form an integral part of Policy Alteration Form.

請閣下確定能盡已所知在此問卷內提供一切屬實資料,否則可導致此份保單條款被修改或無效,而恒安標準人壽(亞洲)有限公司(「本公司」)亦毋須負責賠償,除非所有重要事實已被書面聲明。「重要事實」乃指可能影響本公司所作有關承保本保單之決定或影響本公司就本保單所收取之計劃保費之事實。倘閣下對某些事實有疑問,應當將全部事提供。此問卷將成為保單更改申請表的一部份。

This declaration must be answered by the Life Insured, if the Life Insured is under age 18 on the date this form is signed, the Policy Owner must answer these questions on behalf of the Life Insured.

此聲明書必須由受保人作答,如受保人於簽署此聲明書時未滿 18 歲,以下部份需由保單持有人代為作答。

Policy Number	Name of Policy Owner	Name of Life Insured
保單編號	保單持有人姓名	_ 受保人姓名

For all the answers with "Yes" below, please give details on the Additional Health Information section. Where applicable, please indicate exact diagnosis, date of diagnosis, treatment received, duration of disease(s) and treatments), last follow-up date, current condition, names and addresses of all attending physicians and/or copy of patient card(s).

請就各			月有關題號。如適用,請清楚列明診斷結果、診斷日期、治療方法、患病 È店之副本。	病及接受治療;	之持續時間、
1.	_	cm 厘米 / kg 公斤 /		Yes 是	No 否
	please indicate the	exact change and reasons.	ore than 5 kgs (11lbs) during the last 12 months? If yes, 近公斤 (11 磅) ?如有,請註明更改的體重及原因。		
2.		iths, have you ever used any 引內曾否吸食任何煙草產品?	tobacco products?		
		type, frequency and quantity服用次數及數量:	y: 		
	閣下曾否服食未經處	en non-prescription or illegal 還方或違禁藥物或毒品?	_		
		type, frequency and quantity服用次數及數量:	y: 		
			please indicate average weekly consumption and type. 每星期服用次數及數量:		
3.	chiropractors or physi	otherapists?	follow-ups, including those supervised by psychiatrists, 主或物理治療師進行的檢驗、治療或跟進?		

Health Statement Declaration Form 健康資料聲明書 Yes No 4. In the past 5 years 閣下在過去五年內: 是 否 (a) have you had an operation, hospitalisation or medical treatment? 曾否接受任何手術、住院或治療? (b) have you ever had or been advised to have or intended to have an X-ray, Ultrasound, CAT scan, ECG, blood test, other medical investigation or diagnostic test? 曾否接受或被建議或準備接受任何醫療檢查或檢驗,包括X光、超聲波、電腦掃描、心電圖、驗血等? (c) have you ever suffered from any illness, injury or effects of an accident lasting for more than 14 days? 閣下曾否生病、受傷或受意外影響達十四天以上? 5. Have you ever 閣下曾否: (a) been diagnosed as a Hepatitis B carrier? 被診斷為乙型肝炎帶菌者? (b) had an HIV test or received counseling or medical advice in connection with AIDS or AIDS-related condition or sexually transmitted disease? 接受愛滋病檢驗或與其有關的輔導及醫學意見,患上與愛滋病有關的或由性接觸傳染的疾病? Have any of your parent(s), brother(s) or sister(s) died or suffered from diabetes, kidney, and/or liver disease, heart disease, stroke, cancer, any form of hereditary disease, AIDS or AIDS-related conditions? If yes, please provide details of relationship, illness, age when the illness was discovered and the present condition. 閣下的父母、兄弟姊妹中有否曾患上糖尿病、肝及 / 或腎病、心臟病、中風、癌症、任何遺傳病、愛滋病或其 有關疾病或因上述之病症而去世,如有,請註明親人關係、疾病、發病年齡及現時狀況。 7. Have you ever suffered from or experienced symptoms of: 閣下曾否患有或經歷以下疾病或病徵: (a) any disease(s) or disorder(s) of the heart, blood, blood vessel or circulatory system, such as chest pain, heart murmur, stroke or raised blood pressure? ·任何心臟、血液、血管或循環系統等疾病,如:胸部疼痛、心臟有雜音、中風或高血壓? (b) cancer, tumour, cyst, lump or carcinoma-in-situ of any kind, disorder of lymph gland, diabetes, endocrine disease or thyroid disorder? 癌症、腫瘤、囊腫、腫塊、任何原位癌、任何淋巴腺的疾病、糖尿病、內分泌或甲狀腺等疾病? (c) disorder(s) of the kidney, bladder, stomach, bowel, digestive system, genitourinary disorder or liver (including hepatitis)? 腎、膀胱、胃、腸、消化系統、泌尿生殖系統或肝(包括肝炎)等疾病? (d) any mental or nervous disorder(s), neurological disorder(s), disorder(s) of the musculoskeletal system (including the spine), gout, or arthritis? 任何精神或神經系統、肌胳系統(包括脊髓)、痛風或關節炎等疾病? (e) asthma, bronchitis, tuberculosis or any other chest complaint? 哮喘、支氣管炎、結核病或其他胸肺疾病? (f) any disease(s) or disorder(s) of the eyes, ears, nose, throat or skin? 任何眼、耳、鼻、喉或皮膚等疾病? (g) sleep disordered breathing (including Obstructive Sleep Apnea)? 睡眠呼吸障礙(包括睡眠窒息症)? (h) any other disease(s), disorder(s), physical impairment(s) or deformity(ies) not listed above? 任何以上未提及的疾病、機能失調、身體損傷或缺陷?

Health Statement Declaration Form 健康資料聲明書 If Proposed Life Insured is female, please answer the following questions: Yes No 若準受保人是女性,請回答下列問題: 是 否 (a) Has proposed insured ever had or been told to have or been treated or advised to have investigations or surgery or had history of the following conditions: 準受保人曾經被告知或曾接受治療或建議接受跟進檢查或外科手術或曾患有以下疾病: (i) Breast related conditions such as abnormal mammogram or ultrasound or any other breast disease/disorder? 乳房相關的疾病,例如乳房 X 光檢查或超聲檢查異常或任何其他乳腺疾病/病症? (ii) Gynecological problems such as irregular or excessive menstruation, abnormal pap smear test or any disease/disorder of cervix, vagina, uterus, fallopian tubes, ovaries and organs in the pelvic area? 婦科問題,例如月經不調或過度,宮頸塗片檢查異常或子宮頸、陰道、子宮、輸卵管、卵巢和盆腔區 域的器官是否有任何疾病 / 病症? (iii) Complications or abnormalities associated with pregnancy or delivery such as ectopic pregnancy, diabetes, hypertension, protein in urine? 與懷孕或分娩期間發生妊娠相關的併發症或異常,例如宮外孕、糖尿病、高血壓、蛋白尿? (b) Are you now pregnant? If yes, please state the expected date of delivery and current condition in the table of Additional Health Information 閣下是否正在懷孕?如「是」,請於附加健康資料一欄中註明預產日期及現時狀況。 If Proposed Life Insured is under age 15, please answer the following questions: 若準受保人年齡是十五歲以下,請回答下列問題: (a) How many kgs/lbs has the Proposed Life Insured gained in the past year? 過去一年,準受保人的體重增加了多少公斤/磅? kgs/lbs 公斤 / 磅 If the Proposed Life Insured's weight remained unchanged or lost, please give details. 如準受保人的體重無增加或體重下降,請詳細解釋。 (b) Was the Proposed Life Insured's birth premature or postmature? Any special care needed after birth? 準受保人是否早產或過期出生?出生後曾否接受特別護理? (c) Were there/has there been any birth difficulties, physical defects, lack of mental development, Down's syndrome, congenital disorder, anaemia, leukaemia, other disorder of blood or shown any sign of slow physical or mental development? 曾否出現難產、缺陷、缺乏正常心智發展、唐氏綜合症、先天性疾病、貧血、白血病、其他血液疾病或生 理上或心智發展緩慢的跡象?

Heng An Standard Life (Asia) Limited reserves the right to deduct any medical fee from the initial premium if the application is withdrawn or the policy is cancelled within the cooling-off period (as referred to in the policy provisions). 若申請人於保單簽發前取消保單申請或於冷靜期內取消已簽發之保單,恒安標準人壽(亞洲)有限公司保留於首期保費中扣除已支付之醫療費用的權利(根據保單條款)。

(d) Has the Proposed Life Insured missed any normal immunization procedure?

準受保人曾否遺漏正常的防疫注射程序?

Additional Health Information 附加健康資料 Name & Address of all Attending Any Investigation? Any Treatment? Last Follow-up 任何檢驗 任何治療 Question Exact Diagnosis Date of Diagnosis Date & Physicians, Clinics or **Current Condition** No. Hospitals 所有診治醫生,診所或 醫院名稱及地址 最近一次診治日期 及目前情況 題號 診斷結果 診斷日期 Date 日期 Type 種類 Result 結果 Date 日期 Type 種類 Others 其他:

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Additional Information 附加資料

1.	on the Additional Health In	e outside Hong Kong? If yes, please state city, country, reason, frequency and duration of visits formation section. 工作或居住?如有,請在附加健康資料內註明城市、國家、原因、逗留時間及次數。
		s) of residency you have been stayed more than 183 calendar days in the past 12 months. B過 183 個曆日以上的國家及城市。
		s) of residency you intent to stay more than 183 calendar days in the next 12 months. E超過 183 個曆日以上的國家及城市。
2.	appropriate questionnaire(/ou planning to participate in any hazardour sport(s) or activity(ies)? If yes, please complete s). 危險運動或活動?如有,請填寫有關問卷。
	Yes 是	No 否
3.	For life, accident, disability, 就人壽、意外、傷殘、醫療或危	health or critical illness insurance: 疾保險:
	approved?	ng policy(ies) or have you made any application for life insurance which has not yet been 單或其他已申請尚未被接納之人壽保險?
	Yes 是	□ No n
	If yes, please state com	— 点 pany name(s), type(s) of insurance, sum insured and year of issue. 單類別、保額及發出年份。
	(b) base you ever had an	application or reinstatement declined pastnessed revised promium amount or asserted on
	modified terms?	application or reinstatement declined, postponed, revised premium amount or accepted on 單復效時遭受拒絶、延期、重訂保費或作出任何條款修改?
	Yes 是	No 否
	,_	m in the past 12 months or are you currently making a claim? 可以现在正提出索償?
	Yes 是	No 否

Declaration and Signature 聲明及簽署

I/We declare and agree that the provided information in this Form is complete and not misleading to the best of my/our knowledge and shall form the basis of and be incorporated into the policy. If any of the statements and answers given in this Form are inaccurate or any material facts have not been disclosed. Heng An Standard Life (Asia) Limited (the "Company") may render the application of this policy or application for alteration / reinstatement of the policy voidable

本人/吾等謹此聲明及同意於此申請書內之資料為所認知之全部事實及無任何誤導成份,並作為組成此保單之基礎。倘若恒安標準人壽(亞洲)有限公司(「貴公司」)發現於此申請書內所申述之資料有任何失實或隱瞞之處,貴公司有權取消此保單之申請,或保單更改/復效的申請。

I/We shall disclose to the Company any change in my/our health or insurability after signing this Form until I/we receive the policy or endorsement. 在本人 / 吾等簽署本申請書後直至本人 / 吾等收到保單或確認書前,本人 / 吾等必須向貴公司透露本人 / 吾等的健康狀況或可保權益之任何改變。

I/We authorize any licensed physician, medical practitioner hospital, clinic or other medically related facility; insurance company; or organization that has record or knowledge of me/us or my/our health, to disclose to the Company; its reinsurers and authorized representatives any such information for the purpose of assessing and processing the application or subsequent claims and services arising therefrom. To avoid any uncertainty this authorization shall bind all my/our successors, assignees, executors and all administrators and shall remain valid notwithstanding my/our death or incapacity (including but not limited to mental incapacity). A photocopy of this authorization shall be as valid as the original.

本人 / 吾等特此授權擁有本人任何資料或本人 / 吾等健康記錄之任何註冊醫生、醫療從業員、醫院、診所或其他有關醫療機構、保險公司、或組織,向貴公司、其再保險公司及其授權代表提供任何相關資料,作為評估及處理此申請書或日後之任何索償及服務之用;該授權將在本人去世後繼續生效。為免產生任何疑問,本授權書對本人 / 吾等之繼承人、受讓人、遺囑執行人及遺產管理人均具有約束力。即使本人 / 吾等等死亡或無行為能力 (包括但不限於精神無行為能力),本授權書仍具效力。此授權書之影印副本跟正本同樣有效。

|/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。

Signature must be consistent with that in your policy record. 閣下簽名樣式,應與保單記錄上簽名相同。

Signature of Life Insured 受保人簽署	Date Signed (dd/mm/yy) 簽署日期 (日 / 月 / 年)	
Signature of Policy Owner 保單持有人簽署	Date Signed (dd/mm/yy) 簽署日期 (日 / 月 / 年)	
Signature of Assignee (If applicable) 受讓人簽署 (如適用)	Date Signed (dd/mm/yy) 簽署日期 (日 / 月 / 年)	

Throughout this Personal Information Collection Statement (this "Statement" or "PIC Statement") and the Foreign Tax Reporting and Withholding Obligations Statement (the "Tax Obligations Statement"), certain words and phrases have defined meanings as follows: 本個人資料收集聲明(「本聲明」或「個人資料收集聲明」)及外地稅務呈報/稅務責任聲明(「稅務責任聲明」)中,若干詞彙的定義如下:

"Company" 「公司」

"Company's group"

「公司集團」

"Company's affiliates" 「公司聯屬公司」

"Consenting Person" 「同意人士」

"Compliance Obligations" 「合規責任」

"Customer" 「客戶」

"data subject"

「資料當事人」

"Hong Kong" 「香港」

"PDPO" 「私隱條例」

"personal data" 「個人資料」

means Heng An Standard Life (Asia) Limited;

指恒安標準人壽(亞洲)有限公司;

means Heng An Standard Life Insurance Company Limited registered in People's Republic of China (registered number 120000400008883) having its registered office at 18F, Tower II, The Exchange, 189 Nanjing Road, Heping District, Tianjin, People's Republic of China, 300051 together with its subsidiaries (including but not limited to the Company), subsidiary undertakings and associated companies (whether direct or indirect) from time to time and a "member of the Company's group" shall be construed

指 根據公司法於中華人民共和國註冊的恒安標準人壽保險有限公司(註冊編號為 120000400008883),註冊 辦事處位於中國天津市和平區南京路 189 號津滙廣場 2座 18層 (郵編 300051) 及其不時直接或間接擁有的子 公司(包括但不限於本公司)、附屬公司與關聯公司,「公司集團旗下公司」亦按此詮釋;

means any of the Company's affiliates within the Company's group;

指 任何屬公司集團內的聯屬公司;

means each of the following:

指 每位以下人士:

- (a) the policy owner; 保單持有人;
- (b) each person who has beneficial ownership of the Policy; 每位享有保單實益擁有權的人士;
- (c) each person who is entitled to access the Policy's value (for example, through withdrawal, surrender, policy claim, benefit payment or otherwise), change a Beneficiary, or claim or receive a benefit payment or any person who is entitled to a future benefit under the Policy, including without limitation any policy claimant, assignee and nominated Beneficiary under the Policy; and 有權透過提款、退保、保單索償、收取利益等方法取用保單價值,更改受益人,索取或接受收取利益的人 士,或根據保單每位日後享有收取利益權利的人士,包括但不限於任何保單索償人、保單持承受人及訂明 的受益人;及
- (d) each person who is entitled to receive a payment (such as a policy claimant, policy claimant and nominated Beneficiary) when an obligation to make any payment under the Policy arises or becomes fixed.

當有責任根據保單付款或確定該責任時每位有權接受收取利益的人士(包括保單索償人及指定的受益人)。

means obligations of the Company or of any other members of the Company's group to comply with: 指 我們或公司集團任何成員須遵守以下規定的責任:

- (a) any applicable local or foreign law, ordinance, regulation, demand, guidance, rules, codes of practice, whether or not relating to an intergovernmental agreement between the governments or regulatory authorities of two or more jurisdictions; and 任何適用的本地或外國法律、法令、規定、要求、指引、條例和守則而不論是否有關兩個或以上司法管轄 區的政府之間或監管機構之間的協議;及
- (b) any agreement between the Company (or that of any other member of the Company's group, as the case may be) and any government or taxation authority in any jurisdiction. 我們或公司集團其他成員(視情況而定)與任何司法管轄區的政府或稅務當局之間的協議。

- (a) who is treated generally as a customer by the Company, whether the person is: 被公司一般當作客戶的人士,不論該人士為
 - (i) a policy owner, proposed policy owner, policy assignee, life insured, proposed life insured, party under a trust, payer of insurance premium, beneficiary, payee of insurance benefits, or financial adviser in respect of a product or service of the Company; or 公司產品或服務下的保單持有人、準保單持有人、保單受讓人、受保人、準受保人,信託下的當事人, 保費支付人、受益人、保險金受款人或財務顧問;或
 - (ii) a director, shareholder, officer, or manager of a corporate applicant for insurance or corporate policy owner in respect of a product or service of the Company; and 正在申請或已是公司產品或服務的公司投保人或公司保單持有人之董事、股東、主管或經理;及
- (b) who has provided personal data to the Company and therefore became data subject of the Company;

曾向公司提供個人資料而成為我們資料當事人的人士;

means, in relation to personal data, the individual (not being a corporate person) who is the subject of the data, and all such individuals as a whole shall be referred to as "data subjects"; 指 就個人資料而言,屬該資料的當事人的個人(並非法人),而所有該等個人統稱為「資料當事人」;

means the Hong Kong Special Administrative Region of the People's Republic of China;

指 中華人民共和國香港特別行政區;

means the Personal Data (Privacy) Ordinance, Chapter 486 of the Laws of Hong Kong; 指香港法例第486章之《個人資料(私隱)條例》;

means (as defined in the PDPO) any data:

指 於私隱條例中符合以下說明的任何資料:

- (a) relating directly or indirectly to a living individual; 直接或間接與一名在世的個人有關的;
- (b) from which it is practicable for the identity of the individual to be directly or indirectly ascertained;

從該資料直接或間接地確定有關的個人的身份是切實可行的;及

(c) in a form in which access to or processing of the data is practicable. 該資料的存在形式令予以查閱及處理均是切實可行的。

"Personal Information" 「個人資料」

"Policy Information"

「保單資料」 "Tax Information"

「稅務資料」

in respect of a Consenting Person, means:

有關同意人士的個人資料指:

- (a) where the Consenting Person is an individual, his/her full name, date and place of birth, residential address, mailing address, contact information (including telephone number), and any taxpayer identification number, social security number, citizenships, residency(ies) and tax residency(ies); 倘同意人士為個人,即其全名、出生日期及地點、居住地址、郵寄地址、聯絡資料(包括電話號碼),及 任何納稅人識別編號、社會保障號碼、公民身分、居住地及稅務上的常駐國家;
- (b) where the Consenting Person is a corporate/entity, its date and place of incorporation or formation, registered address, address of place of business, tax identification number, tax status, tax residency, registered address, address of place of business or (if applicable) such information as the Company may reasonably require regarding each of its substantial shareholders and controlling persons.

倘同意人士為公司/機構,即其註冊或成立日期及地點、註冊地址、營業地址、稅務識別編號、稅務狀況、 稅務上的常駐國家或(倘適用)我們合理要求的主要股東及控權人士資料。

means any information relating to the Policy including without limitation the Policy number, Policy balance or value, gross receipts, withdrawals and payments from the Policy.

指有關保單的任何資料,包括但不限於保單編號、保單結餘或價值、總收入、從保單提取及支付的款項。

in respect of a Consenting Person, means:

有關同意人士的稅務資料指:

- (a) any documentation or information (and accompanying statements, waivers and consents as the Company may from time to time require or the Consenting Person may from time to time give) relating, directly or indirectly, to the tax status of the Consenting Person; 與同意人士稅務狀況直接或間接有關的文件或資料,以及我們不時要求或同意人士不時提供的隨附陳述、 放棄及同意文件;
- (b) Personal Information of the Consenting Person; and 同意人士的個人資料;及
- (c) Policy Information. 保單資料。
- Nothing in this Statement shall limit the right of Customers as a data subject under the PDPO. 本聲明並不局限客戶作為資料當事人根據私隱條例所享有的權利。
- From time to time, personal data of Customers are (or will be) collected by or on behalf of the Company to enable it to carry on its day-to-day business and to provide services to Customers. Failure to obtain personal data from Customers may result in the Company being unable to process an insurance application or to provide after-sales services to the Customer.

為使公司能進行其日常業務及向客戶提供服務,客戶的個人資料會不時由公司收集或由他人代為收集。**若公司未能向客戶取得個人資料,則便可能導致公司無法處理** 投保申請或無法向客戶提供售後服務。

- Personal data of Customers held by the Company will generally be kept confidential, but the Company may provide, disclose or transfer these personal data to the following persons (whether they are in or outside Hong Kong) for one or more of the purposes set out in paragraph 5 below: 由公司持有的客戶個人資料一般會被保密,惟公司有可能會向以下人士(不論是在香港境內或境外)提供、披露或轉交該等個人資料以便達到下文第5段中述及的一
 - (a) any reinsurance company to whom any part of the Company's business is ceded; 任何承保公司業務之任何部分的再保公司
 - (b) any financial institution or financial service provider who is in a position to process the payment of, or handle the payment instruction or authorisation of any monies to or by the Customer; 任何處於適當崗位可處理向客戶支付或收取款項,或可執行向客戶支付或收取款項之付款指示或授權的金融機構或金融服務機構;
 - any healthcare service provider who is engaged to carry out medical assessment on the health of a Customer which will affect the Company's decision on processing an insurance application or a claim;
 - 任何受聘負責檢驗客戶健康狀況而該檢驗結果會影響公司處理投保申請或索償決定的醫療服務機構; (d) any professional adviser or service provider who is engaged to provide independent advice or service in a specialised area to the Company and/or the
 - 任何受聘向公司及/或公司聯屬公司提供獨立意見或專門範疇服務的專業顧問或服務機構;
 - (e) any person in connection with any claims made by the Customer or otherwise involving the Customer in respect of any products and/or services provided by the Company or the Company's affiliates, including any claims investigation agency; 任何就公司或公司聯屬公司產品及/或服務與客戶提出索償(或以別的形式被涉及客戶)有關的人士,包括任何索償調查機構;
 - any person to whom the Company and/or the Company's affiliates are under an obligation to make disclosure under any Compliance Obligations or the requirements of any present or future laws, rules, regulations, codes, treaties or guidelines binding or enforceable on them, including any regulators, government authorities, international organisations or alliances, courts, adjudicators, and/or any industry bodies, associations or federations;
 - 任何公司及/或公司聯屬公司根據所須遵守的任何合規責任或現有或未來法例、規則、法規、守則、條約或指引而對其有披露責任的人士,包括任何監管機構、 政府部門、國際組織或聯盟、法院、裁判機構及/或任何行業團體、協會或聯會;
 - (g) any insurance intermediary authorised by the Company and/or the Company's affiliates to promote, sell, or provide after-sales services in relation to, any of the products and services of the Company and/or the Company's affiliates; 任何獲公司及/或公司聯屬公司授權以進行推廣或銷售公司及/或公司聯屬公司任何產品及服務,或就有關產品及服務提供售後服務的保險中介機構;
 - (h) any actual or proposed assignee of the Customer's insurance policy issued by the Company and/or the Company's affiliates;
 - 任何獲發公司及/或公司聯屬公司繕發保單的客戶之實際或準受讓人
 - any actual or proposed purchaser of parts or all of the Company's business and/or those of the Company's group together with its advisers in the transaction;
 - 任何公司及/或公司集團部分或全部業務的實際或準買家,及其交易顧問;
 - any agent, contractor or external service provider who is engaged to provide administrative, audit, data processing, document managing, mailing, printing, payment, storage, technology, telecommunication, or other services to the Company and/or the Company's affiliates in connection with the daily operation of their respective businesses;

any external service provider who is engaged to provide any service which will enhance or add value to the overall experience of the Customer in

- 任何受聘向公司及/或公司聯屬公司就其日常之營運提供行政、審計、資料處理、文檔管理、郵遞、印刷、付款、儲存、技術、電訊,或其他服務的代理商、承 包商或外界服務供應商;
- enjoying the products and/or service of the Company and/or the Company's affiliates; 任何受聘向客戶提供讓其對公司及/或公司聯屬公司產品及/或服務更為滿意或享有提升服務的外界服務機構;
- any research agent or service provider who is engaged to carry out any market surveys or studies; 任何受聘進行市場調查或研究的調查代理或服務供應商;

- (m) any of the Company's affiliates; and
 - 任何公司聯屬公司;及
- any person described in paragraph 7(d) below for the purpose of direct marketing, in case the Customer has given consent for using personal data in (n) relation to such purpose.
 - 任何在客戶同意讓其個人資料被用作直接促銷用途的前題下,於下文第7(d)段所述的人士。
- The purpose(s) for which the personal data of Customers may be used will vary depending on the circumstances and their context of collection, but the purposes perceived by the Company will include the following:

客戶個人資料的用途會因不同情況及收集的背景有異,惟公司屬意用途將包括:

- (a) to offer a quotation for insurance to a Customer, and to assess, evaluate (including the merits and/or suitability of a product or service to a Customer), process, approve and/or underwrite an insurance application, a claim and/or service request from a Customer arising from the application or
 - 提供投保報價予客戶,以及評估、衡量 (包括產品及 / 或服務是否有利於及 / 或適合客戶)、處理、批准及 / 或受理客戶的投保申請、索償及 / 或源於客戶投保申 請或其後的服務要求;
- to provide subsequent or ongoing services to a Customer in relation to an insurance application or policy; 提供有關投保申請或保單的跟進或持續服務予客戶;
- to carry out matching procedures as defined in the PDPO; (c) 執行私隱條例中界定的核對程序;
- to carry out credit assessments on Customers whose credit worthiness is under regular or special review; 進行客戶信用評估,不論該評估為定期或特別審查;
- to carry out surveys for gathering Customer opinion and/or statistical analysis on Customer's behavior or mentality; 進行調查以收集客戶意見及/或作出客戶行為或心態的統計分析;
- to process a payment or a Customer's payment instructions and/or direct debit authorisations; (f) 處理付款或執行客戶的付款指示及/或直接付款授權;
- to determine any amount of indebtedness owing to or from a Customer; (g) 確定欠付客戶或客戶欠付的任何款項;
- to verify a Customer's identity in accordance with any compliance procedures, including those intended to combat terrorist financing, fraud and/or money laundering or otherwise for the purpose of ensuring the Company's Group's Compliance with the Compliance Obligations; 按任何合規程序驗證客戶的身份,包括旨在打擊恐怖活動融資、欺詐及/或洗黑錢活動的程序或在其他情況下用以確保公司集團依從合規責任的程序;
- to maintain an update database of personal data of Customers; 設立及更新客戶個人資料的數據庫;
- to facilitate research or design of insurance or other related financial services and/or products which may be suitable for Customers; (j) 促進研究或設計可能適合客戶的保險或其他相關金融服務及/或產品;
- to enforce a Customer's obligations in respect of an insurance application or policy; 執行客戶在投保申請或保單下的責任;
- to enable an actual or proposed assignee of the Customer's insurance policy, or an actual or proposed purchaser of the Company's business, to evaluate the transaction intended to be the subject of the assignment or purchase; 協助客戶保單的實際或準受讓人或公司業務的實際或準買家,以評估在有關轉讓或買賣交易下的事宜;
- (m) to fulfill the disclosure requirements of any Compliance Obligations, laws, legislation, regulations, codes or guidelines as may in present or future and from time to time be applicable to the Company and/or the persons as listed in paragraph 4 above to whom the Company had transferred personal data of the Customer;
 - 遵守現時或將來不時適用於公司及/或上文第4段所列從公司手上取得客戶個人資料之人士的任何合規責任、法例、法規、規章、守則或指引底下的披露規定;
- (n) to enable the Company to carry on its normal business and day-to-day operations and to meet its liquidity and solvency requirements according to
 - 令公司能繼續經營其正常業務及日常運作,以及符合有關法例對流動資金及償付能力的規定;
- (o) to procure any service which will enhance or add value to a Customer's enjoyment of the products and/or service of the Company and/or the Company's affiliates;
 - 取得任何讓客戶對公司及/或公司聯屬公司產品及/或服務更為滿意或享有額外價值的服務;
- (p) to exercise the Company's rights as more particularly provided in the insurance policy, including the right of subrogation; 行使公司在保單中列明的權利,包括代位權;
- to comply with any obligations, requirements, policies, procedures, directives, or guidelines in respect of sharing data and information within the Company's group and/or any other use of data and information in accordance with group-wide compliance procedures; and/or 遵守公司集團內對共享數據與資料,及 / 或根據集團通用的合規程序將數據與資料用作其他用途的相關責任、規定、政策、程序、指令或指引; 及/或
- to market the service, product and/or subject as further described in paragraph 7 below. 推廣下文第7段所詳述的服務、產品及/或事項
- 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"), financial institutions are required to identify account holders (including certain policy owners and beneficiaries) and controlling persons of certain entity policyholders who are reportable foreign tax residents and report their Tax Information (including but not limited to their name, address, jurisdiction(s) of tax residence, tax identification number in that jurisdiction(s), account balance and income information) to the local tax authority where the financial institution operates or directly to the U.S. Internal Revenue Service. The local tax authority will provide this information to the tax authority of the reportable foreign tax resident's country of tax residence on a regular, annual basis. Without limiting the generality of this Personal Information Collection Statement, the Company will use the Tax Information for the purposes of AEOI and FATCA. The Tax Information may be transmitted by the Company to the Hong Kong Inland Revenue Department or any other relevant domestic or foreign tax authority for transfer to the tax authority of another jurisdiction. The Tax Information may be transmitted by the Company to the U.S. Internal Revenue Service. 根據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,財務機構須辨別具有須申報外國稅務 居民身份的帳戶持有人(包括某些帳戶持有人及保單受益人)和某些實體保單持有人的控權人,並向財務機構營運當地的稅務部門或直接向美國國稅局申報其稅務資 料(包括但不限於姓名、地址、稅務居住地、該稅務居住地的稅務編號、帳戶結餘及收入資料)。當地稅務部門將每年定期將上述資料交予須申報外國稅務居民所屬稅 務居住地的相關稅務部門。在不限制個人資料收集聲明下,本公司會將收集的稅務資料用於自動交換資料及合規法案。本公司會將稅務資料傳遞給香港稅務局或其他 本地或海外稅務部門用於轉交其他司法管轄區的稅務部門。本公司亦可能將稅務資料轉交給美國國稅局。

Use of Personal Data in Direct Marketing 使用個人資料作直接促銷用途

The Company intends to use the personal data of Customers for direct marketing purpose and the Company requires their consent (including an indication of no objection) for the purpose. In this connection:

公司擬使用客戶個人資料作直接促銷用途,惟公司的該用途須取得客戶同意(包括其表示不反對)。就此,請留意:

the name, contact details (including telephone numbers, mailing addresses and email addresses), gender, date of birth, transaction pattern or behavior, financial background, and demographic data (collectively, "Selected Personal Data") being held by the Company may from time to time be used in direct marketing; and

公司所持有客戶的姓名、聯絡資料(包括電話號碼、郵寄地址及電郵地址)、性別、出生日期、交易模式及行為、經濟背景及人口統計數據(統稱「選定個人資料」) 可被不時用作直接促銷用途;及

(b) information delivered by post, electronic mails, SMS, telephone calls, and/or other means of communication may be used by the Company in achieving its direct marketing purpose; and

公司可透過以郵寄、電郵、短訊、電話及/或其他通訊方式轉遞的資料以達到其直接促銷用途;及

(c) the classes of service, product and subject in relation to the Company's direct marketing may include:

有關公司作直接促銷的服務、產品及項目可包括:

- (i) insurance, investment, financial planning, asset and wealth management and related services and/or products;保險、投資、財務策劃、資產和財富管理及相關服務及 / 或產品;
- (ii) lucky draw, games, media event and/or seminar; and 抽獎、遊戲、傳媒活動及 / 或講座;及
- (iii) reward, loyalty, privilege and/or special-offer programs;獎勵、長期客戶、優惠及 / 或特惠計劃;
- (d) the classes of service, product and subject described above may be provided or solicited by the Company and/or:

上述服務、產品及項目可能由公司及/或下述各方提供或取得:

(i) any of the Company's affiliates;

任何公司聯屬公司:

- (ii) third party financial institutions, investment firms, investment advisers and investment service providers; and 第三方金融機構、投資行、投資顧問及投資服務機構;及
- (iii) third party providers of reward, loyalty, privilege and/or special-off er programs; 獎勵、長期客戶、優惠及 / 或特惠計劃的第三方提供者;
- (e) in addition to marketing the classes of service, product and subject described above for and by itself, the Company also intends to provide the Selected Personal Data of Customers to all or any of the persons described in paragraph 7(d) above for use by them in marketing those classes of service, product and subject, and the Company requires the consent of those Customers (including an indication of no objection by them) for such purpose; and

除為自己或靠自己直接促銷上述服務、產品及項目外,公司亦擬提供選定個人資料予上文 7(d) 段所述之全部或任何人士用於其促銷該等服務、產品及項目上,惟公司須取得該等客戶的同意 (包括其表示不反對);及

- (f) if a Customer does not wish to allow the Company to use or provide to other persons any of his/her Selected Personal Data for direct marketing purpose, the Customer can exercise his/her right of objection and notify the Company. 客戶如欲拒絕公司使用,或提供選定個人資料予其他人士使用作直接促銷,可行使反對權並通知公司。
- 8. Under and in accordance with the PDPO, a data subject has the following rights:

根據私隱條例,資料當事人有權:

- (a) to check whether the Company holds data relating to him/her and access to such data; 查證公司是否持有其資料及查閱有關資料;
- (b) to require the Company to correct any data relating to him/her which is inaccurate; and 要求公司改正有關其本人不準確的任何資料;及
- (c) to ascertain the Company's policies and practices in relation to personal data and to be informed of the kind of personal data held by the Company;

查閱公司有關個人資料的政策及實際程序,以及了解公司所持個人資料的種類;及

(d) to request the Company not to use his/her data for direct marketing purpose and the Company must then cease the use for that purpose without charge.

免費要求公司不得就直接營銷目的使用其資料,以及公司隨後必須停止就該用途使用其資料。

- 9. In accordance with the PDPO, the Company has the right to charge a reasonable fee for processing any data access request. 根據私隱條例,公司有權就處理任何查閱資料的要求收取合理費用。
- 10. The requests described above may be made in writing to the Data Protection Officer, Heng An Standard Life (Asia) Limited, 12/F, Lincoln House, Taikoo Place, 979 King's Road, Quarry Bay, Hong Kong.

上述要求可以書面形式郵寄予恒安標準人壽 (亞洲) 有限公司之資料保護主任,地址為香港鰂魚涌英皇道 979 號太古坊林肯大廈 12 樓。

- 11. 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,可毋須通過本人 / 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 11(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 11(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。

(iii) I/We agree that the Company may directly require any other Consenting Person to agree to the disclosure as described in this paragraph 11(b) of the Tax Obligations Statement (or in the relevant policy provision relating to foreign tax reporting and withholding obligations) and/or waive any otherwise applicable restrictions on such disclosure, if the Company reasonably considers appropriate.

本人 / 吾等同意,倘公司有理由認為恰當,可毋須通過本人 / 吾等直接要求其他同意人士同意按稅務責任聲明第 11(b) 段 (或有關外地稅務呈報或稅務責任的相關保單條文)所述作出披露及 / 或放棄相關披露的相關限制。

(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 11(a) of the Tax Obligations Statement; or 倘若本人 / 吾等不遵守稅務責任聲明第 11(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 11(a)(iv) or 11(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 11(a)(iv) 段或第 11(b)(iii) 段所述公司的要求;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,

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

公司可於任何時間採取以下一項或多項行動:

- 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 aft er 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,

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,

as may be required by the Company to ensure its compliance with the Compliance Obligations.

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; 由於公司或公司集團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,公司或公司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 11(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 (視乎情况而定) 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 11(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 (and 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 11(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稅務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 11(c)(l) 及 (ll) 段所公司權力的行使。 (vii) the Tax Obligations Statement shall form an integral part of the Policy once this application is accepted by the Company.
- 12. 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,概以英文版為進。

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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-旦申請獲公司接納,稅務責任聲明即屬保單的一部分

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