

Policy Alteration Form – Form B 保單更改申請表格 - 表格乙

Filling in this form 請填寫此表格

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)
yable by the policyholder(s) under their policy 2018 年 1 月 1 日起,香港保險業監管局將按照法 付的任何收費或費用的一部分,且為獨立於保單應 Stop/Resume Paying Contribut	例就投保人的保單保費 / 供款實施徵費。有關徵費須由投付的任何收費或費用。	保人向保險業監管局繳付,該徵費並不構成投保人於保
Reason(s) of stop paying contributions 申請暫停供款的理由 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 6. Others, please specify 其他,請註明	5. Dissatisfied with Broker Services 經紀服務未如理想	
Stop paying contribution 暫停供款 with immediate effect 即日生效	mm月	у
Resume paying contribution 恢復供款	mm月	_yy年 rment Instruction Form. Please note that Credit

2. For other products, please refer to their relevant product brochures for details of applying for contribution/premium holiday. 其他產品,請參考相關計劃的暫停供款權益。

Policy number	仅	
Policy number '	1米甲編號	

2. Change of Death Benefit Option 更改身故賠償選項 (For LifeMaster Only 只適用於「優越人生」) Please complete this section if you wish to apply for a change of the Death Benefit Option. 如需更改身故賠償選項,請填妥本部份。 Level 定額 101 Change to 更改至: Increasing 增長 If death benefit option is changed from 101 to Level/Increasing, or from Level to Increasing, please complete the "Health Statement Declaration" form for underwriting assessment. 如身故賠償選項由 101 轉為定額 / 增長,或由定額轉為增長,請填妥《健康資料聲明書》,以供審核。 Please note that the change request will be effective upon the premium due date immediately following the underwriting approval or such other date as may be notified by the Company. 請注意,此更改將於核保認可後的保單到期日生效或由本公司指定的日子生效。 3. Change of Occupation 更改職業 Please complete this section if there is a change in your occupation. 如需更改工作範圍及性質,請填妥本部份。 First/Second Policy Owner* First/Second Life Insured* 第一/二保單持有人* 第一/二受保人* (*Please delete where inappropriate 請刪去不適用) New job title New job start date 新職位名稱 新職位上任日期 Exact lob duties 實際工作範圍 New employer's details 新僱主資料: **Employer name** Nature of business 僱主名稱 業務性質 Employer address 僱主地址: Building 室/單位 大廈 座 No. & Street name District 號碼及街名 香港/九龍/新界* 地區 Country ZIP/Postal code(If applicable) 國家 郵號區號(如滴用) Contact number E-mail address Fax number 電郵地址 聯絡雷話 傳真號碼 (Country Code + Area Code + Telephone No) (Country Code + Area Code + Telephone No) lob duties: Indoor work Outdoor work (please specify in the additional information.) 實際工作職能: 室內工作 戶外工作(請於附加資料註明。) Does your work involve manual work? Yes No 你的工作是否牽涉手製、手控或體力勞動的工作? If outdoor and/or manual work involved, please tick the box(es) below to indicate the details: 倘若牽涉戶外及/或牽涉手製、手控或體力的工作,請在下列方格內加「✓」號: Attend appointments outside office Drive vehicle above 3 tonnes Underground work 在公司外見客 駕駛3噸以上之車輛 (Please specify the depth in the additional information.) (請於附加資料註明深度。) Work on construction site High level work Hazardous materials used 建築地盤內 需要高空工作 危險性物料 (Please specify the height in the (Please specify the name of the hazardous material in the additional information.) additional information.) (請於附加資料註明高度。) (請於附加資料註明危險性物料之名稱。) Heavy machinery used Others (please specify in the additional information.) 使用重型機器 其他 (請於附加資料註明。) (Please specify the type of machine in the additional information.) (請於附加資料欄註明機器之種類。) Additional information 附加資料

4. Declaration & Authorisation 聲明及授權

求所影響;

I/We understand that should I/we stop paying 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. I/we understand that the full descriptions of this feature have been provided in the relevant Product Brochure and/or Product Key Facts statement. 本人 / 吾等停止就保單繳交供款 / 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 / 吾等在保單下飽足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。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特點較詳盡的描述。

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選擇層面所收取的費用及收費。

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。

With respect to the investment options 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 Options"), 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 Options 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 Option 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 Options is linked to an external underlying fund, any instruction for the subscription, switching, conversion or redemption of an Investment Option 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
- iii) Each Investment Option 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 Options 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 Option, 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 Option, 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 Option 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
 - 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 Options;
 - 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;
- 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 Options; 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。

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。

4. Declaration & Authorisation 聲明及授權

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 > 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 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站上 www.hengansl.com.hk > Legal and Privacy Statement > Privacy Statement > Personal Information Collection Statement 個人資料收集聲明。透過填妥發交回此表格,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 / 吾等理解本人 / 吾等再權透過電郵至 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。

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。

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 applicable) 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)
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)

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。

Maintaining an up-to-date record of policyowner's information helps us manage your policy effectively. We would like to invite you to complete the following update individual customer information form. 我們邀請您提供您的最新個人資料,以便更有效地處理您的保單。



(if applicable)

第二保單持有人姓名(如適用)

Update Individual Customer Information Form 更新個人客戶資料表格

Filling in this form 請填寫此表格 Please fill in the attached form and return the original form to our office: 12/F, Lincoln House, Taikoo Place, 979 King's Road, Quarry Bay, Hong Kong, within 14 days after you received this letter. If you have any enquiries, please contact our Customer Service Department on (852) 2169 0300, they are available on Monday to Friday from 9:00am to 5:30pm. 請填妥隨函之表格並於收到此通知書 14 天內將已簽署之表格正本寄回本公司辨事處:香港鰂魚涌英皇道 979 號太古坊林肯大廈 12 樓。若閣下有任何查詢,請於星期一至星期五,上午 9 時至下午 5 時 30 分致電本公司客戶服務部 (852) 2169 0300。 Policy Number 保單編號 Name of First Policy Owner 第一保單持有人姓名 第一受保人姓名 Name of Second Policy Owner Name of Second Life Insured

(if applicable)

第二受保人姓名(如適用)

1. Personal Details of Policy Owner 保單持有人資料				
Please complete the below section if different from our company's record. 請填寫下列部份若與本公司紀錄不符。				
First Policy Owner 第一保單持有人	Second Policy Owner 第二保單持有人			
Nationality 國藉	Identification Card No. / Passport No. of Policy Owner* 保單持有人身份證號碼 / 護照號碼 *			
Others 其他	* Please submit HKID copy / Passport copy 請提供香港身份證副本 / 護照副本			
Residential Address 住址	Correspondence Address 通訊地址 (if different from Residential Address 如與住址不同)			
(e.g. Flat / Room, Floor, Building / House 如室,樓,大廈 / 樓)	(e.g. Flat / Room, Floor, Building / House 如室,樓,大廈 / 樓)			
(e.g. Estate, Road / Street 如屋苑,路 / 街名)	(e.g. Estate, Road / Street 如屋苑,路 / 街名)			
District 地區 (e.g. Wanchai, Mongkok, Shatin 如灣仔,旺角,沙田) HK 香港 / KLN 九龍 / NT 新界 *	District 地區 (e.g. Wanchai, Mongkok, Shatin 如灣仔,旺角,沙田) HK 香港 / KLN 九龍 / NT 新界 *			
(*Please delete where inappropriate 請刪去不適用)	(*Please delete where inappropriate 請刪去不適用)			
Country 國家	Country 國家			
ZIP / Postal code (If applicable) 郵遞區號 (如適用)	ZIP / Postal code (If applicable) 郵遞區號 (如適用)			
Note: P.O. Box address is not accepted for residential address 注意:郵政信箱不可作為住址				

1. Personal Details of Policy Owner 保單持有人資料 Permanent Address 永久地址 (if different from Residential Address 如與住址不同) (e.g. Flat / Room, Floor, Building / House... 如室,樓,大廈 / 樓 ...) (e.g. Estate, Road / Street 如屋苑,路/街名) District 地區 (e.g. Wanchai, Mongkok, Shatin... 如灣仔, 旺角,沙田...) HK 香港 / KLN 九龍 / NT 新界 * (*Please delete where inappropriate 請刪去不適用) Country 國家 ZIP / Postal code (If applicable) 郵遞區號 (如適用) Contact no. 聯絡電話 Telephone no. (Residential) Telephone no. (Office) 電話號碼(住宅) 電話號碼 (辦公室) (Country Code + Area Code + Telephone No.) (Country Code + Area Code + Telephone No.) (國家號碼 + 地區號碼 + 電話號碼) (國家號碼 + 地區號碼 + 電話號碼) Mobile phone no. E-mail address 流動電話號碼 電郵地址 (Country Code + Area Code + Telephone No.) (國家號碼 + 地區號碼 + 電話號碼) Name of Present Employer Occupation and Industry 現時僱主名稱 職業及行業 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 No 是 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」。

2. Declaration & Signature 聲明及簽署

本人 / 吾等,上述保單的保單持有人,在此共同及分別確認:

1. In compliance with the legal and regulatory requirements with respect to U.S. Foreign Account Tax Compliance Act (FATCA) and Automatic Exchange of Financial Account Information (AEOI), the Company has the right to request me/us or any Relevant Person to provide certain information (including but not limited to place of birth, address, telephone number, citizenship, residency and Taxpayer Identification Number (TIN) etc) by completing the relevant form where it is applicable. 以遵守美國海外賬戶稅收合規法案及自動交換財務帳戶資料之相關法律及監管要求,貴公司有權要求本人 / 吾等或任何相關人士在適當時填寫相關表格以提供特定資料 (包括但不限於出生地、住址、電話號碼、公民身份、居籍及稅務編號等)。

Personal Information Collection Statement 個人資料收集聲明

- 1. 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。
- 2. 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。

Signature of First Policy Owner	Date of Signature (dd/mm/yy)
第一保單持有人簽署	簽署日期 (日 / 月 / 年)
Signature of Second Policy Owner (if applicable)	Date of Signature (dd/mm/yy)
第二保單持有人簽署(如適用)	簽署日期 (日 / 月 / 年)

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。