



Policy Number 保單編號:

 AXA China Region Insurance Company  
 (Hong Kong) Limited  
 (Expressed as "AXA" / "The Company" in this  
 application form)  
 安盛金融保險(香港)有限公司  
 (於本申請書表述為 "AXA 安盛" / "本公司" / "貴公司")

# AXA VERTEX ANNUITY INVESTLIFE PLAN MISCELLANEOUS APPLICATION FORM

## AXA 駿峰年金投資保障計劃 多項服務申請書

**Simple steps for your service request submission: 請按以下步驟作有關申請:**

- |   |   |
|---|---|
| (1) Complete this form. Please do not sign on a blank form.<br>(2) "✓" the request option and provide the necessary details.<br>(3) Countersign any alteration on this form with the Owner/Trustee/Assignee's (expressed as "Owner" in this form) signature.<br>(4) Please refer to the document checklist for documents required to process your request.<br>(5) Submit this form and supporting documents to your financial consultant or AXA Customer Service Centre.<br>(6) The original of this form and supporting documents you submit will not be returned. | (1) 填寫申請表。請勿在空白申請表上簽署。<br>(2) "✓" 適用的選項並提供所需資料。<br>(3) 本申請書上如有任何修改, 持有人 / 信託人 / 受讓人 (於本申請書表述為「持有人」) 必須在旁加簽。<br>(4) 請參閱所需文件指引以便處理您的申請。<br>(5) 遞交此申請書及所需文件給您的理財顧問或 AXA 安盛客戶服務中心。<br>(6) 您所遞交之正本申請書及所需文件將不獲退還。 |
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### INSURED'S AND OWNER'S INFORMATION 被保人和持有人資料

Full Name of Insured 被保人姓名	
Full Name of Owner 持有人姓名	

### IMPORTANT NOTES 重要事項

- The possible risk(s) associated with the new investment option(s) may become inconsistent with your existing risk profile. Please be reminded to read the product documents (including the Principal Brochure (which consists of the Product Key Facts Statement, the Product Brochure and the Investment Options Leaflet) and the Illustration Document).  
新投資選項相關的潛在風險可能與您現時的風險承擔能力不一致。請細閱產品計劃文件 (包括主要銷售刊物 (其中包括產品資料概要、產品說明書及投資選擇簡介) 及說明文件)。
- If there are material changes to your circumstances since the latest "Risk Profile Questionnaire" processing, please be reminded to submit a new "Risk Profile Questionnaire" and update your risk tolerance level.  
如在最近一次提交的「風險承擔能力問卷」過程中所提供的資料有重要更改, 請提交新「風險承擔能力問卷」及更新您的風險承擔能力。
- "Fund(s)/Investment Option(s)/Investment Fund(s)" is expressed as "Investment Option(s)" in this application form.  
「基金 / 投資選擇 / 投資基金」於本申請書表述為「投資選擇」。
- If service request is to fund the purchase of your new life and/or medical insurance policy, please contact your financial consultant or our customer service centre to understand and submit the "Important Facts Statement - Policy Replacement". You should carefully compare your existing insurance policy against the new insurance policy you intend to purchase, and assess whether replacing your existing insurance policy is in your best interests before you make a final decision.  
若服務申請是用以資助您購買新的人壽及 / 醫療保險保單, 請聯絡您的理財顧問或本公司客戶服務中心以了解及提交「重要資料聲明書一轉保」。您應仔細比較現有保險保單與擬購買的新的保險保單, 並在作出最終決定前評估取代現有保險保單是否最為符合您之最佳利益。

- I hereby confirm that there are material changes to the information provided since the latest "Risk Profile Questionnaire" processing. Enclosed the new "Client Needs Analysis".  
本人謹此聲明, 在最近一次提交的「風險承擔能力問卷」中所提供的資料有重要更改。現附上新「客戶需求分析」。

### 1. PARTIAL WITHDRAWAL AND PAYMENT DELIVERY 提取部份款項及款項發放

Withdrawal Amount 提取金額	USD 美元
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- |   |  |
|---|--|
| <b>Notes:</b> <ol style="list-style-type: none"> <li>This amount will be taken proportionally from all the existing investment options allocated to the policy based upon the value of the units of each of the investment option at the time of unit redemption. The actual withdrawal amount which you will receive will be based on the price of the units redeemed less applicable charges.</li> <li>The amount to be withdrawn and the outstanding Account Value after withdrawal must not be less than the minimum amount as determined by the Company from time to time.</li> <li>Each withdrawal will be subject to Early Encashment Charge (if any) as stipulated in the relevant Principal Brochure and/or the reference table of Early Encashment Charge attached to the policy contract.</li> <li>Guaranteed Value feature and No Lapse Guarantee will be terminated for any withdrawal during the Premium Payment Period.</li> <li>Guaranteed Value feature will be reduced proportionally according to the terms of the policy for any withdrawal after the Premium Payment Period.</li> <li>No partial withdrawal is allowed after annuitisation of the policy.</li> </ol> | <b>注意:</b> <ol style="list-style-type: none"> <li>此款額將從分配到保單的所有投資選擇按比例提取, 該比例基於有關單位贖回時於每項投資選擇的單位價值。您收到的提取款項將根據已贖回單位的價格扣除適用收費而釐定。</li> <li>每次提取的款項及提取後的戶口結餘, 須符合公司不時規定的最低金額 / 結餘要求。</li> <li>每次提取款項將按銷售說明書及 / 或附於保單合約的相關提早贖回費參考表所述收取提早贖回費 (如有)。</li> <li>於保費繳款期內提取任何款項後, 保證價值及不失效保證將會終止。</li> <li>於保費繳款期後提取任何款項, 保證價值將會根據保單條款按比例減少。</li> <li>於收取保證終身入息後, 不可申請提取部份款項。</li> </ol> |
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**2. PAYMENT INSTRUCTION 付款指示****By Autopay 自動轉帳**

- Credit to the autopay account that paying premium of the above policy 存入至繳交上述保單保費之自動轉帳戶口  
 Credit to the bank account below 存入以下銀行戶口 (Please provide bank account proof 請提供銀行帳戶證明)

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

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## Notes:

- (1) Bank account holder must be Policy Owner  
 (2) Bank account proof must show account holder name and account number  
 (3) Autopay is only applicable to banks in Hong Kong and the payment will be paid in Hong Kong Dollar  
 (4) The upper limit of autopay amount is HKD1,000,000

## 注意:

- (1) 銀行帳戶持有人必須為保單持有人  
 (2) 銀行帳戶證明須列有銀行帳戶持有人姓名及銀行帳號  
 (3) 自動轉帳只適用於香港銀行及款項將以港幣支付  
 (4) 自動轉帳的金額上限為港幣 100 萬

**By Cheque 支票** Only applicable for overseas client OR cheque made in foreign currency OR payment amount larger than HKD1,000,000  
 只適用於海外客戶或外幣支票或大於港幣 100 萬的款項

Cheque currency 支票貨幣  
 Hong Kong Dollar 港幣  
 Policy Currency 保單貨幣

Place to bank in (Applicable for foreign currency cheques) 入票地區 (適用於外幣支票)  
 Hong Kong and Mainland China 香港及中國內地  
 Outside Hong Kong and Mainland China 香港及中國內地以外

## Delivery Method 領取方式

- By mail to correspondence address 郵寄通訊地址  
 To be collected at Customer Service Centre in person 本人親自於客戶服務中心領取 (Location 地點: \_\_\_\_\_)  
 (Contact No. 聯絡電話號碼: \_\_\_\_\_)
- Through my Financial Consultant 經理財顧問轉交

Note 注意: If not specify, the cheque will be delivered to you directly. 如沒註明, 支票將直接寄給您。

**3. CHANGE INVESTMENT OPTION ALLOCATION INSTRUCTION 更改投資選擇分配指示**

		Plan Category 計劃類別	Plan 105 計劃 105	Plan 100 計劃 100
<b>Bond Options 債券系列</b>				
Investment Option Code 投資選擇代號	Investment Option 投資選擇	Share Class 股份類別	At least 50% of total Investment Option Allocation 投資選擇分配合共最少 50%	At least 30% of total Investment Option Allocation 投資選擇分配合共最少 30%
AFHYA	AB FCP I - Global High Yield Portfolio 聯博 - 環球高收益基金	A2	%	%
AFOAU	AB FCP I - European Income Portfolio 聯博 - 歐洲收益基金	A2	%	%
TPGRA	Templeton Global Total Return Fund 鄧普頓環球總收益基金	A (acc) A (累算)	%	%
<b>Total Investment Option Allocation for Bond Options 債券系列投資選擇分配合共</b>			% (A)	% (C)
<b>Selected Options 特選系列</b>				
Investment Option Code 投資選擇代號	Investment Option 投資選擇	Share Class 股份類別	Maximum 25% of total Investment Option Allocation 投資選擇分配合共最高 25%	
BHKCF	Barings Hong Kong China Fund 霸菱香港中國基金	A Inc A 收益		
FISS2	Fidelity Funds - Asian Special Situations Fund 富達基金 - 亞洲特別機會基金	A		
FIEM2	Fidelity Funds - Emerging Markets Fund 富達基金 - 新興市場基金	A		
MMMUE	BlackRock Global Funds - Emerging Europe Fund 貝萊德全球基金 - 新興歐洲基金	A2		
MMMWM	BlackRock Global Funds - World Mining Fund 貝萊德全球基金 - 世界礦業基金	A2		
<b>Total Investment Option Allocation for Selected Options 特選系列投資選擇分配合共</b>			% (D)	

Equity Options 股票系列				
Investment Option Code 投資選擇代號	Investment Option 投資選擇	Share Class 股份類別	Maximum 50% of total Investment Option Allocation 投資選擇分配合共最高 50%	45%-70% of total Investment Option Allocation (Depending on your allocation in Selected Options and Bond Options) 投資選擇分配合共 45%-70% (視乎您於特選系列及債券系列的分配)
AFGGA	AB SICAV I – Sustainable Global Thematic Portfolio 聯博 - 環球可持續趨勢基金	AX	%	%
FIAM2	Fidelity Funds – America Fund 富達基金 - 美國基金	A	%	%
FIEUM	Fidelity Funds – European Growth Fund 富達基金 - 歐洲增長基金	A	%	%
TPUSO	Franklin U.S. Opportunities Fund 富蘭克林美國機會基金	A (acc) A (累算)	%	%
TPEUL	Templeton Euroland Fund 鄧普頓歐元區基金	A (acc) A (累算)	%	%
TPGGF	Templeton Global Fund 鄧普頓環球美元基金	A (Ydis) A (每年派息)	%	%
<b>Total Investment Option Allocation for Equity Options</b> 股票系列投資選擇分配合共			% (B)	% (E)
<b>Total 合共</b>			<b>(A) + (B) = 100%</b>	<b>(C) + (D) + (E) = 100%</b>

**Notes:**

- (1) Minimum allocation for each Investment Option is 5%.
- (2) Maximum no. of Investment Options after the change of Investment Option Allocation Instruction cannot exceed 10 Investment Options.
- (3) Percentage must be in whole number.
- (4) Allocation to the Selected Options, Equity Options and Bond Options is subject to the Maximum / Minimum percentage(s) of the plan. Please refer to the Principal Brochure of the AXA Vertex Annuity InvestLife Plan for details.

**注意:**

- (1) 每項投資選擇分配之百分率不可少於 5%。
- (2) 更改分配指示後之投資選擇總數不可超過 10 項投資選擇。
- (3) 百分率必須為整數。
- (4) 所揀選的特選系列、股票系列及債券系列需符合有關計劃類別的最高 / 最低百分比要求而分配。詳情請參閱 AXA 駿峰年金投資保障計劃之主要推銷刊物。

**4. INVESTMENT OPTION SWITCHING 投資選擇轉換**

**(A) Switching from Selected Options to all other options**  
由特選系列轉換到所有其他系列

Selected Options 特選系列			(i)	(ii)
Investment Option Code 投資選擇代號	Investment Option 投資選擇	Share Class 股份類別	Switch from (Units) 轉換出 (單位數目)	Switch to (%) 轉換入 (%)
BHKCF	Barings Hong Kong China Fund 霸菱香港中國基金	A		%
FISS2	Fidelity Funds – Asian Special Situations Fund 富達基金 - 亞洲特別機會基金	A		%
FIEM2	Fidelity Funds – Emerging Markets Fund 富達基金 - 新興市場基金	A		%
MMMUE	BlackRock Global Funds – Emerging Europe Fund 貝萊德全球基金 - 新興歐洲基金	A2		%
MMMWM	BlackRock Global Funds – World Mining Fund 貝萊德全球基金 - 世界礦業基金	A2		%

Equity Options 股票系列			(ii)
Investment Option Code 投資選擇代號	Investment Option 投資選擇	Share Class 股份類別	Switch to (%) 轉換入 (%)
AFGGA	AB SICAV I – Sustainable Global Thematic Portfolio 聯博 - 環球可持續趨勢基金	AX	%
FIAM2	Fidelity Funds – America Fund 富達基金 - 美國基金	A	%
FIEUM	Fidelity Funds – European Growth Fund 富達基金 - 歐洲增長基金	A	%
TPUSO	Franklin U.S. Opportunities Fund 富蘭克林美國機會基金	A (acc) A (累算)	%
TPEUL	Templeton Euroland Fund 鄧普頓歐元區基金	A (acc) A (累算)	%
TPGGF	Templeton Global Fund 鄧普頓環球美元基金	A (Ydis) A (每年派息)	%

Bond Options 債券系列			(ii)
Investment Option Code 投資選擇代號	Investment Option 投資選擇	Share Class 股份類別	Switch to (%) 轉換入 (%)
AFHYA	AB FCP I - Global High Yield Portfolio 聯博 - 環球高收益基金	A2	%
AFOAU	AB FCP I - European Income Portfolio 聯博 - 歐洲收益基金	A2	%
TPGRA	Templeton Global Total Return Fund 鄧普頓環球總收益基金	A (acc) A (累算)	%
			<b>Total 合共 100%</b>

**(B) Switching from Equity Options to Equity Options and/or Bond Options**  
由股票系列轉換到股票系列及 / 或債券系列

Equity Options 股票系列			(i)	(ii)
Investment Option Code 投資選擇代號	Investment Option 投資選擇	Share Class 股份類別	Switch from (Units) 轉換出 (單位數目)	Switch to (%) 轉換入 (%)
AFGGA	AB SICAV I - Sustainable Global Thematic Portfolio 聯博 - 環球可持續趨勢基金	AX		%
FIAM2	Fidelity Funds - America Fund 富達基金 - 美國基金	A		%
FIEUM	Fidelity Funds - European Growth Fund 富達基金 - 歐洲增長基金	A		%
TPUSO	Franklin U.S. Opportunities Fund 富蘭克林美國機會基金	A (acc) A (累算)		%
TPEUL	Templeton Euroland Fund 鄧普頓歐元區基金	A (acc) A (累算)		%
TPGGF	Templeton Global Fund 鄧普頓環球美元基金	A (Ydis) A (每年派息)		%

Bond Options 債券系列			(ii)
Investment Option Code 投資選擇代號	Investment Option 投資選擇	Share Class 股份類別	Switch to (%) 轉換入 (%)
AFHYA	AB FCP I - Global High Yield Portfolio 聯博 - 環球高收益基金	A2	%
AFOAU	AB FCP I - European Income Portfolio 聯博 - 歐洲收益基金	A2	%
TPGRA	Templeton Global Total Return Fund 鄧普頓環球總收益基金	A (acc) A (累算)	%
			<b>Total 合共 100%</b>

**(C) Switching from Bond Options to Bond Options**  
由債券系列轉換到債券系列

Bond Options 債券系列			(i)	(ii)
Investment Option Code 投資選擇代號	Investment Option 投資選擇	Share Class 股份類別	Switch from (Units) 轉換出 (單位數目)	Switch to (%) 轉換入 (%)
AFHYA	AB FCP I - Global High Yield Portfolio 聯博 - 環球高收益基金	A2		%
AFOAU	AB FCP I - European Income Portfolio 聯博 - 歐洲收益基金	A2		%
TPGRA	Templeton Global Total Return Fund 鄧普頓環球總收益基金	A (acc) A (累算)		%
			<b>Total 合共 100%</b>	

**Notes:**

- (1) Minimum allocation for each Investment Option is 5%.
- (2) Switch in and switch out cannot be processed for the same Investment Option.
- (3) Maximum no. of Investment Options after the Investment Option Switching cannot exceed 10 Investment Options.
- (4) The current minimum amount to be switched is USD500.
- (5) Switching from Equity or Bond Options to Selected Options is not allowed.
- (6) Switching from Bond Options to Equity Options is not allowed.

**注意:**

- (1) 每項投資選擇分配之百分率不可少於 5%。
- (2) 不可同時轉換入及轉換出同一投資選擇。
- (3) 轉換後之投資選擇總數不可超過 10 項投資選擇。
- (4) 現時每次轉換投資選擇之金額不可少於 500 美元。
- (5) 不可由股票系列或債券系列轉換到特選系列。
- (6) 不可由債券系列轉換到股票系列。

## 5. CHANGE OF PERSONAL INFORMATION 更新個人資料

If the identity document and/or address of Owner has/have been changed since last submission, please put a 「✓」 in the related box(es) below.  
若持有人的身份證件和 / 或地址自上次提交後有所更改，請在下列相關的空格內加上「✓」號。

- Change of Identity Document (Please also submit copy of the latest identification proof. If information is changed, your policy record will be updated)  
更改身份證件 (請同時提交最新身份證明文件副本。如資料有所更改，保單記錄將會更新)
- Change of Residential Address/Business Address/Registered Office Address in Place of Incorporation (Please also submit copy of address proof issued within 3 months from the date of submission and “Policy Service Application Form I”)  
更改住宅地址 / 公司業務地址 / 於成立註冊地點之公司註冊辦事處地址 (請同時提交於申請遞交日期 3 個月內發出之地址證明副本及「保單服務申請書 I」)

## PERSONAL INFORMATION COLLECTION STATEMENT 收集個人資料的聲明

Please visit our website (www.axa.com.hk) and read carefully the details of the Personal Information Collection Statement (“PICS”) which can also be made available upon request. 請登入本公司網頁 (www.axa.com.hk) 下載或向本公司索取收集個人資料的聲明 (“該聲明”)，並細閱《該聲明》的詳細資料。

## DECLARATIONS AND AGREEMENTS 聲明及協議

**I HEREBY CONFIRM** that I am not acting on behalf of any other person for this policy change/service application unless otherwise expressly indicated in this application form or any other documents provided to the Company for this application.

**I HEREBY DECLARE AND AGREE** on behalf of myself and other persons referred in the relevant policy contract(s) and in this application (hereinafter referred to as “Relevant Persons”, “We”, “Our” or “Us”) (for the avoidance of doubt, the expressions “Relevant Persons”, “We”, “Our” or “Us” include myself and such other persons) that:

- (1) I/We, the undersigned, Owner of the above policy, hereby apply for the policy service/unit withdrawal as indicated above subject to the relevant terms and conditions of the above policy;
- (2) the application(s) shall only take effect provided all of the following conditions are met: (i) any required payment under the application(s) is paid in full; (ii) the application(s) is/are approved by the Company at the Company's office (as defined in the policy contract of the above policy) during the lifetime of the person(s) insured under the above policy; (iii) all applicable requirement(s) is/are met; (iv) I/We am legally entitled to the benefits to be withdrawn under the above policy, which have not been assigned or transferred to any other party and that no proceedings in bankruptcy or insolvency have been instituted or are pending against me/Us;
- (3) the application(s) shall be effective from the date of this request unless a later date is specifically indicated, but only if the change is provided by the policy or is allowed by the Company under the policy;
- (4) I/We have read and fully understood the relevant Principal Brochure and Investment Option leaflet and fully understand that investment in an investment-linked plan involves risks and value of Units in the Investment Option may rise or fall;
- (5) the benefits payable under such plan are linked to the performance of the Investment Option invested in respect of the above policy;
- (6) cancellation of Units of the Investment Option in respect of the application(s) will be carried out in accordance with the time period as stipulated in the policy contract of the above policy;
- (7) my/Our investment option allocation instruction is based on my/Our own judgment and I/We have not relied on any advice provided by the financial consultant or other person acting on behalf of the Company;
- (8) I/We confirm that neither the Financial Consultant nor anyone else acting on behalf of the Company has provided me/Us with any investment advice in connection with any investment-linked plan or discussed with me/Us or provided me/Us with any information concerning any of the securities or other assets underlying any investment-linked plan other than to provide me/Us with factual information about the securities or other assets upon which the value of particular investment options is based;
- (9) the application(s) as indicated above is/are based on my/Our own judgment and I/We have not relied on any advice provided by financial consultant;
- (10) all information, statements and answers to all questions whether or not written by my/Our own hand(s) are to the best of my/Our knowledge and belief complete and true;
- (11) all statements and answers to such questions, together with this application, shall form the basis for policy change/service;
- (12) the Company is not bound by any statement which I/We may have made to any person if not written or printed here;
- (13) If I/We fail to provide any information requested in this application, it may result in the Company's inability to accept or process this application. The Company shall not be responsible for any loss or damage whatsoever arising out of or in connection with the Company's inability to accept or process this application due to my/Our failure in providing any information requested in this application.

**I HEREBY AUTHORIZE** on behalf of the Relevant Persons

the Company to give either the Insurance Authority or other parties, as required for relevant records or information. This authorization shall bind the successors and assignees of the Relevant Persons and remains valid notwithstanding death or incapacity. A photocopy of this authorization shall be as valid as the original.

**I/WE ACKNOWLEDGE AND CONFIRM** that I/We have read and understood the Personal Information Collection Statement (“PICS”). I/We confirm that I/We have been advised to read carefully the PICS, and I/We have read it carefully its effect and impact in respect of my/Our personal data collected or held by the Company (whether contained in this application or otherwise). Based on the foregoing, I/We hereby give my/Our acknowledgement and agree to the use and transfer of my/Our personal data by the Company in accordance with the PICS, including the use and provision of my/Our personal data for the purpose of direct marketing.

**I HEREBY DECLARE** that I understand that the Company may deduct any outstanding amount applicable from the payout and/or sum received by the Company under the policy according to the applicable statutory and/or regulatory requirement(s), including levy collected by the Insurance Authority.

**I HEREBY DECLARE AND AGREE** that I have the full authority from and consent of the Relevant Persons to make the above declarations, agreements and authorizations.

In the event of any inconsistency between the English version and the Chinese version, the English version shall prevail.

**本人謹此確認**本人並沒有代表任何其他人士提出此保單更改 / 服務申請；如在此申請書或就此申請提交的任何其他文件上另有註明則除外。

**本人謹此代表本人及其他在此申請書上及有關的保單合約內提及之人士 (下稱「相關人士」或「我們」)** (為免存疑, 「相關人士」或「我們」指包括本人及此申請書上及有關的保單合約內提及之其他人士) **聲明及同意:**

- (1) 本人 / 我們乃上述保單之持有人，現根據上述保單之條款申請保單更改 / 服務及或按上列指示提取上述保單投資選擇單位；
- (2) 申請需符合下列條件後方可生效：(i) 繳清所有申請所需之款項；(ii) 申請是於受保人在生之情況下經貴公司在公司辦事處審核；(iii) 符合申請所需之要求；(iv) 上述保單之利益為本人 / 我們合法所擁有及未有轉讓予任何人等，及本人 / 我們現未有或沒有尚未判決因破產或清盤之訴訟；
- (3) 更改之要求由申請日期生效，除非特別指定一較遲日期，但該更改必須是保單內列為可更改事項或經貴公司許可；
- (4) 本人 / 我們已細閱並明白有關主要推銷刊物及投資選擇簡介並完全明白投資在投資連繫式壽險計劃涉及風險，投資選擇單位價值可升亦可跌；
- (5) 此計劃的可支付利益與上述保單所投資的投資選擇表現連繫；
- (6) 如申請是有關取消及 / 或購入投資選擇單位，有關申請將根據上述保單的保單合約內所訂明之時間進行；
- (7) 本人 / 我們之投資選擇分配指示是基於本人 / 我們之個人判斷，並沒有依賴任何理財顧問或任何代表貴公司之人士所提供的任何意見；
- (8) 本人 / 我們確認除關於影響個別投資選擇價值之證券或其他資產的真實資料外，理財顧問或任何代表貴公司之人士並無向本人 / 我們就任何投資連繫式壽險計劃提供任何投資意見，或跟本人 / 我們討論或提供任何有關投資連繫式壽險計劃旗下任何證券或其他資產的任何資料；
- (9) 上述之申請是基於本人 / 我們之個人判斷，並沒有依賴任何理財顧問所提供的意見；
- (10) 上述一切陳述及問題的所有答案，不論是否本人 / 我們親手所寫，就本人 / 我們所知所言，均為事實之全部並確實無訛；
- (11) 上述問題的所有答案 (如適用) 及此申請書，將成為保單更改 / 服務的根據；
- (12) 本人 / 我們對任何人所作出的任何聲明，如沒有在此申請書上填寫或印出，貴公司不須受其約束；
- (13) 如本人 / 我們不能提供任何此申請所需的資料，貴公司或不能接受或處理此申請。對於任何因本人 / 我們不能提供任何此申請所需的資料而導致貴公司不能接受或處理此申請所引致或所涉及的任何損失或損害，貴公司概不承擔任何責任。

**本人謹此代表相關人士授權**貴公司於有需要時，向保險業監管局或其他機構提供相關紀錄或資料。此授權對相關人士之繼承人及受讓人具有約束力；即使相關人士死亡或無行為能力時，此授權仍具效力。此授權書的影印本與正本均有同等效力。

**本人 / 我們確認**本人 / 我們已閱讀並明白收集個人資料的聲明《該聲明》。本人 / 我們確認本人 / 我們已被通知本人 / 我們須詳細閱讀《該聲明》，而本人 / 我們已詳細閱讀《該聲明》對貴公司所收集或持有之本人 / 我們的個人資料的影響 (不論是否此表格所載或從其他途徑所取得)。根據以上所述，本人 / 我們特此確認並同意貴公司根據《該聲明》使用及轉移本人 / 我們的個人資料，包括在直接促銷中使用及將本人 / 我們個人資料提供予其他人士。

**本人謹此聲明**本人明白貴公司或會從保單的給付金額及 / 或貴公司為保單所收金額中，根據適用法定及 / 或規管要求扣除任何逾期金額，包括保險業監管局收取的徵費。

**本人謹此聲明及同意**已獲相關人士授權及同意本人作出以上聲明、協議及授權。

如中英文版本的條款有任何分歧，請以英文版本為準。

**SUITABILITY DECLARATION 合適性聲明**

I HEREBY DECLARE AND AGREE on behalf of myself and other persons referred in the relevant policy contract(s) and in this application (hereinafter referred to as "We", "Our" or "Us") (for the avoidance of doubt, the expressions "We", "Our" or "Us" include myself and such other person) that despite the fact that the features and/or risk level of the selected mix of underlying investment option(s) may not be suitable for me/Us based on my disclosed risk profile as indicated in the latest Risk Profile Questionnaire, I/We confirm that it is my/Our intention and desire to proceed with this instruction.

本人謹此代表本人及其他在此申請書上及有關的保單合約內提及之人士（下稱「我們」）（為免存疑，「我們」指包括本人及此申請書上及有關的保單合約內提及之其他人士）聲明及同意儘管根據本人 / 我們於最近一次提交的「風險承擔能力問卷」所披露的投資風險概況，本人 / 我們所選擇的相關投資選擇組合特色及 / 或風險級別可能並不適合本人 / 我們，本人確認此乃本人 / 我們之打算及意願進行本指示。

**SIGNATURE 簽署**

I/WE ACKNOWLEDGE AND CONFIRM that I/We have carefully read this form and understood the Important Notes.

本人 / 我們確認本人 / 我們已詳細閱讀本表格並明白重要事項。

Signature of Owner* 持有人簽署 *	Date (dd/mm/yyyy) 日期 (日 / 月 / 年)

\*Please ensure the signature matches with the one provided in the policy file. 簽名式樣須與保單上的記錄相符。

**FINANCIAL CONSULTANT'S DETAILS 理財顧問資料**

Name 姓名	Code 編號	Contact Number 聯絡號碼
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**DOCUMENT CHECKLIST 所需文件指引**

Type of service request 服務申請類別	Documents Required (Please ✓ against the documents you submitted) 所需文件 (請 ✓ 您已提交的文件)
Investment Option Withdrawal 投資選擇提取	<input type="checkbox"/> Copy of the Owner's identification proof (if not provided before) 持有人身份證明文件副本 (若之前未曾提交) <input type="checkbox"/> Bank account proof (e.g. bank book, copy of debit card/EPS) which shows account holder name and account number (if select autopay as payment instruction) 銀行帳戶證明 (例如銀行存摺、提款卡副本)，而該證明須列有銀行帳戶持有人姓名及銀行帳號 (如選用自動轉帳為付款指示) <input type="checkbox"/> Important Facts Statement – Policy Replacement (if applicable) 重要資料聲明書 – 轉保 (如適用)

**CONTACT US 聯絡我們**

If you have any questions on your request, please reach us at 如果您有任何疑問，請聯絡我們。

 (852) 2802 2812

 [www.axa.com.hk](http://www.axa.com.hk)

 [cs@axa.com.hk](mailto:cs@axa.com.hk)

**AXA is committed to making your service request process as easy and stress-free as possible.**

**Thank you for insuring with us. We are always glad to be of service.**

**安盛致力使您的服務申請過程輕鬆簡單。感謝您與我們投保。我們很高興為您服務。**