

## User Guide for Periodic Withdrawal (Wealth Master Service)

### 定期提取 ( 財富管家服務 ) 使用者指南

Capitalised terms used in this user guide shall bear the same meanings ascribed to such terms in the policy contract unless provided otherwise. Please refer to the policy contract for details.

除非另有所指，本使用者指南所使用的大寫術語視為與保單條款的該術語含義相同。詳情請查閱保單條款。

#### 1.) Eligible Products 適用產品

- Max Goal II Insurance Plan 「尊尚盈家 II」壽險計劃
- WealthAhead II Savings Insurance 盛利 II 儲蓄保險

#### 2.) Eligible Recipient 收款人條件

- For individual-owned policies 個人持有的保單:
  - Any recipient (who is an individual) must have attained the age of 18 on the first payment date;  
and  
任何收款人 ( 個人 ) 必須於首個收款日年滿 18 歲 ; 及
  - The recipient must be the Owner or in such relationship(s) with the Owner as permitted by the Company from time to time e.g. spouse, parents, child, grandparents, siblings, fiancé/fiancée, grandchildren, stepchildren, parents-in-law  
收款人必須為持有人或與持有人有本公司不時同意的關係，例如：持有人的配偶、父母、子女、祖父母、兄弟姊妹、未婚夫 / 未婚妻、孫子女、繼子女、岳父母
- For corporate-owned policies 公司持有的保單:
  - Any recipient (who is an individual) must have attained the age of 18 on the first payment date;  
and  
任何收款人 ( 個人 ) 必須於首個收款日年滿 18 歲 ; 及
  - Only the Owner/insured/beneficiary of the Policy can be the recipient.  
僅限本保單的持有人 / 被保人 / 受益人可成為收款人。

### 3.) Available Withdrawal Options 可選擇的提取選項

Available Withdrawal Options vary across different products. Please refer to the relevant table below.

不同產品可選擇的提取選項有所不同，請參考下表。

Table A 甲表: Max Goal II Insurance Plan 「尊尚盈家 II」壽險計劃

Available Withdrawal Option 可選擇的提取選項	Earliest effective date <sup>#</sup> 最早生效日期 <sup>#</sup>	Withdrawal sequence (withdrawal from the relevant account or value in the following order for each withdrawal under each option) 提取順序 (每個選項下的每次提取，按以下順序從相關戶口或價值中提取)
Withdrawal of policy value (reduction of Notional Amount allowed) 提取保單價值 (允許減少名義金額)  <i>Note: Notional amount may be reduced under this option</i> 註：此選項或可導致名義金額減少	3 <sup>rd</sup> Policy Anniversary 第 3 個保單週年日	1.) Terminal Dividend Lock-in Account <sup>%</sup> 終期紅利鎖定戶口 <sup>%</sup>  2.) Guaranteed Cash Value and Terminal Dividend 保證現金價值及終期紅利  <i>Note:</i> <i>Notional amount will be reduced corresponding to the withdrawal under item 2 above</i> 註： 名義金額將根據上述第 2 項之提取而相應減少
Withdrawal of policy value from lock-in account <sup>!</sup> 從鎖定戶口 <sup>!</sup> 中提取保單價值	5 <sup>th</sup> Policy Anniversary 第 5 個保單週年日	1.) Terminal Dividend Lock-in Account <sup>%</sup> 終期紅利鎖定戶口 <sup>%</sup>
Withdrawal of policy value from lock-in account <sup>!</sup> with any remaining balance to be withdrawn by way of exercising lock-in option 從鎖定戶口 <sup>!</sup> 中提取保單價值，任何剩餘餘額將通過行使鎖定選項提取	5 <sup>th</sup> Policy Anniversary 第 5 個保單週年日	1.) Terminal Dividend Lock-in Account <sup>%</sup> 終期紅利鎖定戶口 <sup>%</sup>  2.) Exercise Terminal Dividend Lock-in Option <sup>^</sup> and withdraw the remaining balance from Terminal Dividend Lock-in Account

<b>Available Withdrawal Option</b> 可選擇的提取選項	<b>Earliest effective date<sup>#</sup></b> 最早生效日期 <sup>#</sup>	<b>Withdrawal sequence (withdrawal from the relevant account or value in the following order for each withdrawal under each option)</b> 提取順序 (每個選項下的每次提取，按以下順序從相關戶口或價值中提取)
		就剩餘餘額行使終期紅利鎖定選擇權 <sup>^</sup> 及從終期紅利鎖定戶口提取

<sup>#</sup> The actual payment date(s) is/are the Working Day(s) immediately following the respective policy anniversary (if withdrawal frequency of “annually” is selected) or policy monthiversary (if withdrawal frequency of “monthly” is selected). A “Working Day” means a day (other than Saturday) on which banks in Hong Kong are open for normal banking business.

<sup>#</sup> 實際支付日期為相關保單週年日 (如選擇提取頻率為「每年」) 或保單週月日 (如選擇提取頻率為「每月」) 之後緊接的工作日。「工作日」指香港銀行正常進行銀行業務的日子 (星期六除外)。

<sup>%</sup> Terminal Dividend Lock-in Account is only available from the 5<sup>th</sup> policy anniversary.

<sup>%</sup> 終期紅利鎖定戶口由第 5 個保單週年日起適用。

<sup>!</sup> The lock-in account refers to the Terminal Dividend Lock-in Account.

<sup>!</sup> 鎖定戶口是指終期紅利鎖定戶口。

<sup>^</sup> Subject to certain conditions, including but not limited to requirements (as may be determined by the Company from time to time) on minimum lock-in amount per lock-in (currently USD100/HKD800/RMB650) and annual maximum lock-in rate. For the avoidance of doubt, if the Terminal Dividend Lock-in Option is exercised, the policy owner cannot apply to exercise Terminal Dividend Lock-in Option again in the same policy year. For details of the Terminal Dividend Lock-in Option, please refer to the policy contract and product brochure.

<sup>^</sup> 受限於若干條件，包括及不限於由本公司不時釐定的每次鎖定最低鎖定金額 (目前為 100 美金/800 港幣/ 650 人民幣) 及每年最高鎖定期率。為免存疑，若已行使終期紅利鎖定選擇權，保單持有人不可在同一保單年度內再次申請行使終期紅利鎖定選擇權。有關終期紅利鎖定選擇權的詳情，請參閱保單條款及產品說明書。

**Table B 乙表: WealthAhead II Savings Insurance 盛利 II 儲蓄保險**

<b>Available Withdrawal Option</b> <b>可選擇的提取選項</b>	<b>Earliest effective date<sup>#</sup></b> <b>最早生效日期<sup>#</sup></b>	<b>Withdrawal sequence (withdrawal from the relevant account or value in the following order for each withdrawal under each option)</b> <b>提取順序 (每個選項下的每次提取，按以下順序從相關戶口或價值中提取)</b>
<p>Withdrawal of policy value (reduction of Notional Amount allowed)            提取保單價值 (允許減少名義金額)</p> <p><i>Note: Notional amount may be reduced under this option</i>            註：此選項或可導致名義金額減少</p>	<p>3<sup>rd</sup> Policy Anniversary            第 3 個保單週年日</p>	<ol style="list-style-type: none"> <li>1.) Prime Currency Account<sup>@</sup>              主要貨幣戶口<sup>@</sup></li> <li>2.) Global Currency Account<sup>@</sup>              環球貨幣戶口<sup>@</sup></li> <li>3.) Cash value of reversionary bonus and cash value of its corresponding terminal bonus              保額增值紅利的現金價值及其相關的終期紅利的現金價值</li> <li>4.) Guaranteed cash value and cash value of its corresponding terminal bonus              保證現金價值及相關的終期紅利的現金價值</li> </ol> <p><i>Note: Notional amount will be reduced corresponding to the withdrawal under item 4 above</i>            註：名義金額將根據上述第 4 項之提取而相應減少</p>
<p>Withdrawal of policy value (reduction of Notional Amount not allowed)            提取保單價值 (不允許減少名義金額)</p> <p><i>Note: Notional amount will not be reduced under this option</i>            註：此選項將不會導致名義金額減少</p>	<p>3<sup>rd</sup> Policy Anniversary            第 3 個保單週年日</p>	<ol style="list-style-type: none"> <li>1.) Prime Currency Account<sup>@</sup>              主要貨幣戶口<sup>@</sup></li> <li>2.) Global Currency Account<sup>@</sup>              環球貨幣戶口<sup>@</sup></li> <li>3.) Cash value of reversionary bonus and cash value of its corresponding terminal bonus              保額增值紅利的現金價值及其相關的終期紅利的現金價值</li> </ol>

<b>Available Withdrawal Option</b> 可選擇的提取選項	<b>Earliest effective date<sup>#</sup></b> 最早生效日期 <sup>#</sup>	<b>Withdrawal sequence (withdrawal from the relevant account or value in the following order for each withdrawal under each option)</b> 提取順序 (每個選項下的每次提取，按以下順序從相關戶口或價值中提取)
Withdrawal of policy value from lock-in account <sup>^</sup> 從鎖定戶口 <sup>^</sup> 中提取保單價值	5 <sup>th</sup> Policy Anniversary 第 5 個保單週年日	1.) Prime Currency Account <sup>@</sup> 主要貨幣戶口 <sup>@</sup> 2.) Global Currency Account <sup>@</sup> 環球貨幣戶口 <sup>@</sup>

<sup>#</sup> The actual payment date(s) is/are the Working Day(s) immediately following the respective policy anniversary (if withdrawal frequency of “annually” is selected) or policy monthiversary (if withdrawal frequency of “monthly” is selected). A “Working Day” means a day (other than Saturday) on which banks in Hong Kong are open for normal banking business.

<sup>#</sup> 實際支付日期為相關保單週年日 (如選擇提取頻率為「每年」) 或保單週月日 (如選擇提取頻率為「每月」) 之後緊接的工作日。「工作日」指香港銀行正常進行銀行業務的日子 (星期六除外)。

<sup>@</sup> The Prime Currency Account and the Global Currency Account are only available from the 5<sup>th</sup> policy anniversary.

<sup>@</sup> 主要貨幣戶口及環球貨幣戶口由第 5 個保單週年日起適用。

<sup>^</sup> The lock-in account refers to the Prime Currency Account and the Global Currency Account.

<sup>^</sup> 鎖定戶口是指主要貨幣戶口及環球貨幣戶口。

#### 4.) Form Filling Guidance 表格填寫指引

Form 表格	Scenario 情況	Policy Service Request 保單服務申請	Completion Guideline 填寫指引
Periodic Withdrawal (Wealth Master Service) Application Form 定期提取 ( 財富 管家服務 ) 申請 書	<p>If you are applying to set up the Periodic Withdrawal (Wealth Master Service) 如您申請設立定期提取 ( 財富管家服務 )</p>	<p>Set-up of Periodic Withdrawal (Wealth Master Service) 設立定期提取 ( 財富管家服務 )</p>	<p>(a) Select section 1.1; and (b) Fill in all the fields in sections 2.1, 2.2 and 2.3 (a) 選擇 1.1 部分;及 (b) 填寫 2.1、2.2 及 2.3 部分所有欄位</p>
	<p>If you are applying to (a) amend the designation of recipients (add new recipients, remove and/or replace any existing recipient(s)); and/or (b) change the existing payout sequence under the Wealth Master Service you have set up 如您申請更改您所設立的財富管家服務下 (a) 收款人的指定 ( 新增收款人、刪減及/或取代任何現有收款人 ) ; 及/或 (b)現有的支付次序</p>	<p>Amendment to the Designation of Recipients and/or Change of Payout Sequence 更改收款人的指定及/或更改支付次序</p>	<p>(a) Select section 1.2; (b) Provide full name of all existing recipient(s) in the existing recipient(s) list and all updated recipient(s) in the updated recipient(s) list in section 1.2; (c) Provide the updated payout sequence of all recipients in the updated recipient(s) list in section 1.2; and (d) For addition and/or replacement of recipient(s), also provide information of the new recipient(s) in sections 2.2 and 2.3 (a) 選擇 1.2 部分; (b) 於 1.2 部分現有收款人名單提供所有現有收款人姓名及更新的收款人名單提供所有更新的收款人姓名 ;</p>

Form 表格	Scenario 情況	Policy Service Request 保單服務申請	Completion Guideline 填寫指引
			(c) 於 1.2 部分更新的收款人名單提供所有收款人的新支付次序；及 (d) 如新增及/或取代收款人，同時於 2.2 及 2.3 部分提供新收款人的資料
	If you are applying to change the withdrawal option and/or withdrawal frequency 如您申請更改提取選項及/或提取頻率	Change of Withdrawal Option and/or Withdrawal Frequency 更改提取選項及/或提取頻率	(a) Select section 1.3; and (b) Select withdrawal option and/or withdrawal frequency under section 2.1 (a) 選擇 1.3 部分；及 (b) 於 2.1 部分選擇提取選項及/或提取頻率
	If you are applying to update any information and/or payment instruction of existing recipient(s) 如您申請更新任何現有收款人資料及/或付款指示	Update Information and/or Payment Instruction of Existing Recipient(s) 更新現有收款人資料及/或付款指示	(a) Select section 1.4; (b) Provide full name of the existing recipient(s) under section 2.2(i); and (c) Provide the updated information of the existing recipient(s) in the relevant field(s) under section 2.2 and/or payment instruction of the existing recipient(s) in the relevant field(s) under section 2.3 (a) 選擇 1.4 部分； (b) 於 2.2 部分(i)提供現有收款人姓名；及 (c) 於 2.2 部分相關欄位提供更新的現有收款人資料及/或

Form 表格	Scenario 情況	Policy Service Request 保單服務申請	Completion Guideline 填寫指引
	<p>If you are applying to terminate the Periodic Withdrawal (Wealth Master Service) 如您申請終止定期提取 ( 財富管家服務 )</p>	<p>Termination of Periodic Withdrawal (Wealth Master Service) 終止定期提取 ( 財富管家服務 )</p>	<p>於 2.3 部分相關欄位提供更新的現有收款人付款指示</p> <p>Select section 1.5 選擇 1.5 部分</p>



Policy Number 保單編號:

# PERIODIC WITHDRAWAL (WEALTH MASTER SERVICE) APPLICATION FORM

## 定期提取 ( 財富管家服務 ) 申請書

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

**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/Assignee's (expressed as "Owner" in this form) signature/Irrevocable beneficiary's 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 / 受讓人 (於本申請書表述為「持有人」) / 不可撤銷受益人必須在旁加簽。<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。 |
|---|--|

<b>INSURED'S AND OWNER'S INFORMATION 被保人和持有人資料</b>	
Full Name of Insured 被保人姓名	
Full Name of Owner 持有人姓名	

<b>IMPORTANT NOTES 重要事項</b>
<ol style="list-style-type: none"> <li>1. If the 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.</li> <li>2. This application form is applicable to the eligible products only. Please refer to the User Guide for Periodic Withdrawal (Wealth Master Service) attached to this application form for the list of eligible products and details of the Wealth Master Service (including but not limited to withdrawal options available, and the corresponding withdrawal sequence and earliest effective date requirement).</li> <li>3. Capitalised terms used in this application form shall bear the same meanings ascribed to such terms in the policy contract unless provided otherwise. Please refer to the policy contract for details.</li> <li>4. Wealth Master Service is an administrative service arrangement offered by the Company and not a plan feature of the eligible products. Withdrawals will reduce the policy value and the potential growth of the policy value, and may affect future benefits under the policy. If you exercise the Wealth Master Service in early policy years, the amount withdrawn plus the remaining policy value may be considerably less than the total premiums paid. You are advised to seek professional advice before submitting this application.</li> <li>5. This application form relates to the policy of which the Policy Number is stated on this application form (the "Policy").</li> </ol> <ol style="list-style-type: none"> <li>1. 若服務申請是用以資助您購買新的人壽及 / 或醫療保險保單, 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。</li> <li>2. 此申請書只適用於適用產品。有關適用產品列表及財富管家服務詳情包括但不限於提取選項、相應的提取順序及最早生效日期要求, 請參閱附著於本申請書上的定期提取 ( 財富管家服務 ) 使用者指南。</li> <li>3. 除非另有所指, 本申請書所使用的大寫術語視為與保單條款該術語含義相同。詳情請查閱保單條款。</li> <li>4. 財富管家服務乃本公司提供的行政服務安排, 並不屬於適用產品的產品特點。提取將降低保單價值及保單價值的潛在增長, 或會影響保單的未來利益。如您於初期的保單年度行使財富管家服務, 提取金額加上保單剩餘價值可能低於總繳付保費。您在遞交申請前應先自行尋求專業意見。</li> <li>5. 此申請表所涉及的保單, 其保單號碼已在本申請表上註明 (「本保單」)。</li> </ol>

### 1. PERIODIC WITHDRAWAL (WEALTH MASTER SERVICE) 定期提取 ( 財富管家服務 )

<input type="checkbox"/> <b>1.1 SET-UP OF PERIODIC WITHDRAWAL (WEALTH MASTER SERVICE) 設立定期提取 (財富管家服務)</b>
Notes: 1. Applicable if you are applying to set up the Periodic Withdrawal (Wealth Master Service). 2. A maximum of 3 recipients can be designated. 3. Please fill in all the fields in sections 2.1, 2.2 and 2.3. 注意: 1. 適用於如您申請設立定期提取(財富管家服務)。 2. 最多可指定3名收款人。 3. 請填寫2.1、2.2及2.3部分所有欄位。

<p><b>Request of the Owner 持有人之要求</b></p> <p>I, the Owner of the Policy, hereby request to set up Wealth Master Service with the information as stated below for the Policy effective upon the Company's approval of this application.                  本人, 即本保單的持有人, 謹此要求由本申請獲得貴公司批准時根據以下所述資料為本保單設立財富管家服務。</p>
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**1.2 AMENDMENT TO THE DESIGNATION OF RECIPIENTS AND/OR CHANGE OF PAYOUT SEQUENCE 更改收款人的指定及/或更改支付次序**

Notes:

1. Applicable if you are applying to (a) amend the designation of recipients (add new recipients, remove and/or replace any existing recipient(s)); and/or (b) change the existing payout sequence under the Wealth Master Service you have set up.
2. A maximum of 3 recipients can be designated.
3. Please provide (a) full name of all existing recipient(s) in the existing recipient(s) list and all updated recipient(s) in the updated recipient(s) list below; and (b) the updated payout sequence of all recipients in the updated recipient(s) list below.
4. For addition and/or replacement of recipient(s), please also provide information of the new recipient(s) in sections 2.2 and 2.3.
5. The existing recipient(s) list and the payout sequence for all existing withdrawal instructions under the Wealth Master Service will be superseded and replaced by the updated recipient(s) list (including payout sequence) indicated in this application form upon the Company's approval of this application.
6. Where any existing recipient is removed or replaced, the existing withdrawal instruction for such recipient under the Wealth Master Service will be terminated upon the Company's approval of this application.

注意:

1. 適用於如您申請更改您所設立的財富管家服務下(a)收款人的指定(新增收款人、刪減及/或取代任何現有收款人);及/或(b)現有的支付次序。最多可指定3名收款人。
2. 請於下方(a)現有收款人名單提供所有現有收款人姓名及更新的收款人名單提供所有更新的收款人姓名;及(b)更新的收款人名單提供所有收款人的新支付次序。
3. 如新增及/或取代收款人,請同時於2.2及2.3部分提供新收款人的資料。
4. 由本申請獲得本公司批准時,本申請表更新的收款人名單(包括支付次序)將取代財富管家服務下所有現有提款指示的現有收款人名單及支付次序。
5. 由本申請獲得本公司批准時,任何被刪減或取代的現有收款人於財富管家服務下的相關現有提款指示將被終止。

**Request of the Owner 持有人的要求**

I, the Owner of the Policy, hereby request to amend the designation of the recipient(s) and/or change the payout sequence of the recipients under the Wealth Master Service as stated below for the Policy effective upon the Company's approval of this application.

本人,即本保單的持有人,謹此要求由本申請獲得貴公司批准時更改財富管家服務下收款人的指定及/或收款人的支付次序為以下所述。

		Existing Recipient(s) List 現有收款人名單			Updated Recipient(s) List 更新的收款人名單
FROM 由	(A) _____	TO 至	(A) _____	( )	
	(B) _____		(B) _____	( )	
	(C) _____		(C) _____	( )	
	Full Name of Existing Recipient(s) 現有收款人姓名		Full Name of Recipient(s) 收款人姓名	Payout Sequence 支付次序	

**1.3 CHANGE OF WITHDRAWAL OPTION AND/OR WITHDRAWAL FREQUENCY 更改提取選項及/或提取頻率**

Notes:

1. Please select withdrawal option and/or withdrawal frequency under section 2.1
2. Withdrawal option and/or withdrawal frequency of all existing withdrawal instruction(s) under the Wealth Master Service will be superseded and replaced with the updated withdrawal option and/or withdrawal frequency indicated in this application form upon the Company's approval of this application.

注意:

1. 請於2.1部分選擇提取選項及/或提取頻率。
2. 由本申請獲得本公司批准時,本申請表更新的提取選項及/或提取頻率將取代財富管家服務下所有現有提款指示的提取選項及/或提取頻率。

**Request of the Owner 持有人的要求**

I, the Owner of the Policy, hereby request to change the withdrawal option and/or withdrawal frequency under the Wealth Master Service as stated below for the Policy effective upon the Company's approval of this application.

本人,即本保單的持有人,謹此要求由本申請獲得貴公司批准時為本保單更改財富管家服務下的提取選項及/或提取頻率為以下所述。

**1.4 UPDATE INFORMATION AND/OR PAYMENT INSTRUCTION OF EXISTING RECIPIENT(S) 更新現有收款人資料及/或付款指示**

Notes:

1. Applicable if you are applying to update any information and/or payment instruction of existing recipient(s).
2. Please provide (a) full name of the existing recipient(s) under section 2.2(i); and (b) the updated information of the existing recipient(s) in the relevant field(s) under section 2.2 and/or payment instruction of the existing recipient(s) in the relevant field(s) under section 2.3.
3. The relevant information and/or payment instruction of the existing recipient(s) of the existing withdrawal instruction for the relevant recipient(s) under the Wealth Master Service will be superseded and replaced with the updated information indicated in this application form upon the Company's approval of this application.

注意:

1. 適用於如您申請更新任何現有收款人資料及/或付款指示。
2. (a)請於2.2部分(i)提供現有收款人姓名;及(b)請於2.2部分相關欄位提供更新的現有收款人資料及/或於2.3部分相關欄位提供更新的現有收款人付款指示。
3. 由本申請獲得本公司批准時,本申請表更新的現有收款人相關資料及/或付款指示將取代財富管家服務下該現有提款指示的現有收款人資料及/或付款指示。

**Request of the Owner 持有人的要求**

I, the Owner of the Policy, hereby request to update the information and/or payment instruction of the existing recipient(s) under the Wealth Master Service as stated below for the Policy effective upon the Company's approval of this application.

本人,即本保單的持有人,謹此要求由本申請獲得貴公司批准時為本保單更新財富管家服務下的現有收款人資料及/或付款指示為以下所述。

**1.5 TERMINATION OF PERIODIC WITHDRAWAL (WEALTH MASTER SERVICE) 終止定期提取 (財富管家服務)**

**Request of the Owner 持有人的要求**

I, the Owner of the Policy, hereby request to terminate the Periodic Withdrawal (Wealth Master Service) for the Policy with effect from the Company's approval.

本人,即本保單的持有人,謹此要求自貴公司批准之日起,終止本保單的定期提取(財富管家服務)。

## 2. FURTHER INFORMATION 更多資料

### 2.1 WITHDRAWAL OPTION/WITHDRAWAL FREQUENCY 提取選項/提取頻率

(Please select one withdrawal option and withdrawal frequency only 只可選擇一項提取選項及提取頻率)

<p><b>(i) Withdrawal Option<sup>^</sup></b> <b>(i) 提取選項<sup>^</sup> :</b></p> <p><sup>^</sup> For available Withdrawal Option, please refer to User Guide for Periodic Withdrawal (Wealth Master Service). <sup>^</sup> 可選擇的提取選項請參閱定期提取(財富管家服務)使用者指南</p>	<p><input type="checkbox"/> Withdrawal of policy value (reduction of Notional Amount allowed)* 提取保單價值 (允許減少名義金額) *</p> <p><input type="checkbox"/> Withdrawal of policy value (reduction of Notional Amount not allowed) 提取保單價值 (不允許減少名義金額)</p> <p><input type="checkbox"/> Withdrawal of policy value from lock-in account 從鎖定戶口中提取保單價值</p> <p><input type="checkbox"/> Withdrawal of policy value from lock-in account with any remaining balance to be withdrawn by way of exercising lock-in option 從鎖定戶口中提取保單價值, 任何剩餘餘額將通過行使鎖定選項提取</p> <p><b>* Important Notes on Reduction of Notional Amount 減少名義金額重要事項</b></p> <p>1. The subsequent policy values will be adjusted accordingly based on the reduced Notional Amount. 後續的保單價值將根據已減少之名義金額作相應調整。</p> <p>2. Once Notional Amount is reduced, the reduced amount cannot be reinstated. 減少名義金額後, 已減少的金額不可還原。</p> <p>3. All withdrawal instruction(s) under the Wealth Master Service will be terminated if, on a withdrawal date:</p> <p>(i) the policy value or the value in the lock-in account of the Policy (as the case may be) is not sufficient to cover the withdrawal amount in respect of a recipient under the selected withdrawal option;</p> <p>(ii) the withdrawal will cause the Notional Amount of the basic plan to fall below the minimum requirement as determined by the Company from time to time; or</p> <p>(iii) the withdrawal will cause the supplement's sum insured to be reduced or the supplement to be terminated due to the reduction of Notional Amount of the basic plan.</p> <p>財富管家服務下的所有提款指示將被終止, 如於提取日:</p> <p>(i) 本保單的保單價值或鎖定戶口價值(視情況而定)不足以就所選的提取選項支付收款人的提取金額;</p> <p>(ii) 提取將會使基本計劃的名義金額低於本公司不時釐定的最低要求; 或</p> <p>(iii) 提取將會使基本計劃的名義金額減少導致附加保障的保額將被減少或附加保障將被終止。</p>
<p><b>(ii) Withdrawal Frequency</b> <b>(ii) 提取頻率:</b></p>	<p><input type="checkbox"/> Annually 每年</p> <p><input type="checkbox"/> Monthly 每月</p>

### 2.2 INFORMATION OF RECIPIENT 收款人資料

	RECIPIENT A 收款人 A	RECIPIENT B 收款人 B	RECIPIENT C 收款人 C
<p><b>(i) Full Name of Recipient</b> <b>(i) 收款人姓名 :</b></p> <p>(As shown on H.K.I.D. Card/Passport/Birth Certificate) (香港身份證 / 護照 / 出生證明書上的姓名)</p>	<p>Name In English 英文姓名</p> <p>Surname 姓 _____</p> <p>Given Name 名 _____</p> <p>Name In Chinese 中文姓名</p> <p>_____</p> <p>(If applicable) (如適用)</p>	<p>Name In English 英文姓名</p> <p>Surname 姓 _____</p> <p>Given Name 名 _____</p> <p>Name In Chinese 中文姓名</p> <p>_____</p> <p>(If applicable) (如適用)</p>	<p>Name In English 英文姓名</p> <p>Surname 姓 _____</p> <p>Given Name 名 _____</p> <p>Name In Chinese 中文姓名</p> <p>_____</p> <p>(If applicable) (如適用)</p>
<p><b>(ii) Payout Sequence:</b> <b>(ii) 支付次序:</b></p> <p>Please state the payout sequence in (1), (2) &amp; (3) among the recipients. If no payout sequence is indicated, payouts will be made in the following order of priority:</p> <p>(1) Recipient A (2) Recipient B (3) Recipient C</p> <p>請以(1)、(2)及(3)提供收款人的支付次序。如沒有註明支付次序, 支付將以下列優先次序發出:</p> <p>(1) 收款人 A (2) 收款人 B (3) 收款人 C</p>			

2.2 INFORMATION OF RECIPIENT (CONT'D) 收款人資料 (續)			
	RECIPIENT A 收款人 A	RECIPIENT B 收款人 B	RECIPIENT C 收款人 C
<b>(iii) Relationship to Owner</b> <b>(iii) 與持有人的關係</b>	<input type="checkbox"/> Own Self# 本人# <input type="checkbox"/> Spouse 配偶 <input type="checkbox"/> Brother 兄/弟 <input type="checkbox"/> Sister 姊/妹 <input type="checkbox"/> Parents 父母 <input type="checkbox"/> Children 子女 <input type="checkbox"/> Grandparents 祖父母 <input type="checkbox"/> Grandchildren 孫子女 <input type="checkbox"/> Parents-in-law 岳父母 <input type="checkbox"/> Son/Daughter-in-law 女婿/媳婦 <input type="checkbox"/> Fiancé/Fiancée 未婚夫/未婚妻 <input type="checkbox"/> Stepchildren 繼子女 <input type="checkbox"/> Others 其他: _____	<input type="checkbox"/> Own Self# 本人# <input type="checkbox"/> Spouse 配偶 <input type="checkbox"/> Brother 兄/弟 <input type="checkbox"/> Sister 姊/妹 <input type="checkbox"/> Parents 父母 <input type="checkbox"/> Children 子女 <input type="checkbox"/> Grandparents 祖父母 <input type="checkbox"/> Grandchildren 孫子女 <input type="checkbox"/> Parents-in-law 岳父母 <input type="checkbox"/> Son/Daughter-in-law 女婿/媳婦 <input type="checkbox"/> Fiancé/Fiancée 未婚夫/未婚妻 <input type="checkbox"/> Stepchildren 繼子女 <input type="checkbox"/> Others 其他: _____	<input type="checkbox"/> Own Self# 本人# <input type="checkbox"/> Spouse 配偶 <input type="checkbox"/> Brother 兄/弟 <input type="checkbox"/> Sister 姊/妹 <input type="checkbox"/> Parents 父母 <input type="checkbox"/> Children 子女 <input type="checkbox"/> Grandparents 祖父母 <input type="checkbox"/> Grandchildren 孫子女 <input type="checkbox"/> Parents-in-law 岳父母 <input type="checkbox"/> Son/Daughter-in-law 女婿/媳婦 <input type="checkbox"/> Fiancé/Fiancée 未婚夫/未婚妻 <input type="checkbox"/> Stepchildren 繼子女 <input type="checkbox"/> Others 其他: _____
# If the Recipient is the Owner, you are not required to fill in the following fields (iv) – (ix) in this section 2.2. Please submit Policy Service Application Form I if there is any change in the Owner's personal information. # 如收款人為持有人，您毋須填寫本部分2.2以下欄位(iv) – (ix)。如持有人的個人資料有任何更新，請提交保單服務申請書 I。			
<b>(iv) Gender</b> <b>(iv) 性別</b>	<input type="checkbox"/> Male 男性 <input type="checkbox"/> Female 女性	<input type="checkbox"/> Male 男性 <input type="checkbox"/> Female 女性	<input type="checkbox"/> Male 男性 <input type="checkbox"/> Female 女性
<b>(v) Date of Birth</b> <b>(YYYY/MM/DD)</b> <b>(v) 出生日期 (年 / 月 / 日)</b>			
<b>(vi) H.K.I.D. Card/Passport/ Birth Certificate</b> <b>(vi) 香港身份證 / 護照 / 出生證明書</b>	<input type="checkbox"/> HK Permanent Resident: H.K.I.D. Card/Birth Certificate 香港永久性居民: 香港身份證/ 出生證明書 _____ <input type="checkbox"/> Non-HK Permanent Resident: H.K.I.D. Card/Passport/Birth Certificate * 非香港永久居民: 香港身份證/ 護照/出生證明書* _____	<input type="checkbox"/> HK Permanent Resident: H.K.I.D. Card/Birth Certificate 香港永久性居民: 香港身份證/ 出生證明書 _____ <input type="checkbox"/> Non-HK Permanent Resident: H.K.I.D. Card/Passport/Birth Certificate * 非香港永久居民: 香港身份證/ 護照/出生證明書* _____	<input type="checkbox"/> HK Permanent Resident: H.K.I.D. Card/Birth Certificate 香港永久性居民: 香港身份證/ 出生證明書 _____ <input type="checkbox"/> Non-HK Permanent Resident: H.K.I.D. Card/Passport/Birth Certificate * 非香港永久居民: 香港身份證/ 護照/出生證明書* _____
* For Non-HK Permanent Resident, please submit nationality proof. * 如為非香港永久居民，請遞交國籍證明。			
<b>(vii) Residential Address</b> <b>(vii) 居住地址</b>			
<b>(viii) Correspondence Address</b> <b>(viii) 通訊地址</b>			

2.2 INFORMATION OF RECIPIENT (CONT'D) 收款人資料 (續)			
	RECIPIENT A 收款人 A	RECIPIENT B 收款人 B	RECIPIENT C 收款人 C
(ix) Mobile Number (for receiving SMS) (ix) 手提電話號碼 (作接收短訊之用)	( ) _____ (Country Code) Mobile No. (國家編號) 手提電話號碼	( ) _____ (Country Code) Mobile No. (國家編號) 手提電話號碼	( ) _____ (Country Code) Mobile No. (國家編號) 手提電話號碼
(x) Withdrawal Amount* (in Policy Currency): (x) 提取金額* (保單貨幣): * Must be an integer * 必須為整數			
(xi) Payment Currency: (xi) 付款貨幣:	<input type="checkbox"/> HKD 港元 <input type="checkbox"/> Policy Currency 保單貨幣	<input type="checkbox"/> HKD 港元 <input type="checkbox"/> Policy Currency 保單貨幣	<input type="checkbox"/> HKD 港元 <input type="checkbox"/> Policy Currency 保單貨幣
<b>Notes:</b> If your policy currency is not in Hong Kong dollar but you have selected Hong Kong dollar as payment currency, the withdrawal amount will be converted to Hong Kong dollar based on the Company's prevailing exchange rate (as determined by the Company from time to time). <b>注意:</b> 如您的保單貨幣不是港元但您已選港元為付款貨幣，提取金額將會根據本公司當時適用之匯率(由本公司不時釐定)轉換為港元。			
(xii) Withdrawal Start Year (YYYY) (xii) 提取開始年份(年份)			
<b>Notes:</b> (1) The recipient (who is an individual) must have attained the age of 18 on the first payment date (2) The first payment date will be the Working Day (as defined in clause (2) of the Terms and Conditions) immediately following the policy anniversary which falls in the withdrawal start year <b>注意:</b> (1) 收款人 (個人) 必須於首個收款日年滿18歲 (2) 首個收款日為提取開始年份之保單週年日之後緊接的工作日 (定義於條款及細則中的條款(2))			
(xiii) Withdrawal Duration (in number of years#) (xiii) 提取期 (以年為單位#) # Must be an integer # 必須為整數			

2.3 PAYMENT INSTRUCTION 付款指示 (Please select one payment instruction for each recipient 請為每名收款人選擇一種付款指示)			
	RECIPIENT A 收款人 A	RECIPIENT B 收款人 B	RECIPIENT C 收款人 C
(i) By Autopay 自動轉帳 (HKD Only 只限港元)	<input type="checkbox"/> <b>By Autopay 自動轉帳</b> 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. 銀行號碼 <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Branch No. 分行號碼 <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Account No. 戶口號碼 <input type="text"/> <input type="text"/>	<input type="checkbox"/> <b>By Autopay 自動轉帳</b> 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. 銀行號碼 <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Branch No. 分行號碼 <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Account No. 戶口號碼 <input type="text"/> <input type="text"/>	<input type="checkbox"/> <b>By Autopay 自動轉帳</b> 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. 銀行號碼 <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Branch No. 分行號碼 <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Account No. 戶口號碼 <input type="text"/> <input type="text"/>
<b>Notes:</b> (1) Bank account holder name must be the same as the Recipient's name (2) Bank account proof must show account holder name and account number (3) Autopay is only applicable to bank accounts in Hong Kong and the payment will be paid in Hong Kong dollar (4) The upper limit of autopay amount is HKD1,000,000 <b>注意:</b> (1) 銀行帳戶持有人姓名必須與收款人姓名相同 (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帳戶及款項將以港幣支付 (4) 自動轉帳的金額上限為港幣 100 萬			

2.3 PAYMENT INSTRUCTION (CONT'D) 付款指示 (續)			
	RECIPIENT A 收款人 A	RECIPIENT B 收款人 B	RECIPIENT C 收款人 C
<b>(ii) By Cheque 支票</b> (HKD & USD only. For HKD, the withdrawal amount of each withdrawal must be greater than HKD1,000,000) (只限港元及美元。港元每一次提取金額必須大於港元100萬)	<input type="checkbox"/> By Cheque 支票	<input type="checkbox"/> By Cheque 支票	<input type="checkbox"/> By Cheque 支票
	<b>Notes:</b> (1) The cheque must be deposited in Hong Kong (2) The cheque will be delivered to the recipient directly <b>注意:</b> (1) 支票必須於香港入票 (2) 支票將直接寄給收款人		
<b>(iii) By Telegraphic Transfer 電匯</b>	<input type="checkbox"/> By Telegraphic Transfer 電匯	<input type="checkbox"/> By Telegraphic Transfer 電匯	<input type="checkbox"/> By Telegraphic Transfer 電匯
	<b>Notes:</b> (1) Please submit Telegraphic Transfer Request Letter (available from your financial consultants) and bank account proof showing account holder name and account number (2) Service fee and administration fee will be charged by bank(s) and need to be borne by the recipient <b>注意:</b> (1) 請提交電匯申請信 (可向您的理財顧問索取) 及銀行帳戶證明列有銀行帳戶持有人姓名及銀行帳號 (2) 銀行或會收取手續費及服務費用及需由收款人承擔		

### 3. TERMS AND CONDITIONS 條款及細則

By signing this form, I, the Owner, **FULLY UNDERSTAND AND AGREE** to the following:

- (1) The application form must be submitted at least 30 days before the intended effective date of the withdrawal. The intended effective date of the withdrawal is the policy anniversary which falls in the withdrawal start year (or where there are more than 1 recipient, the earliest withdrawal start year among the recipients) (as indicated in section 2.2 (xii) of this application form).
- (2) The actual payment date(s) is/are the Working Day(s) immediately following the respective policy anniversary (if withdrawal frequency of “annually” is selected) or policy monthiversary (if withdrawal frequency of “monthly” is selected). A “Working Day” means a day (other than Saturday) on which banks in Hong Kong are open for normal banking business.
- (3) Up to 3 recipients may be nominated for receiving the withdrawal amount.
- (4) The following conditions must be fulfilled while the Policy is in effect:
  - a) For individual-owned policies:
    - i. Any recipient (who is an individual) must have attained the age of 18 on the first payment date; and
    - ii. The recipient must be the Owner or in such relationship(s) with the Owner as permitted by the Company from time to time e.g. spouse, parents, child, grandparents, siblings, fiancé/fiancée, grandchildren, stepchildren, parents-in-law;
  - b) For corporate-owned policies:
    - i. Any recipient (who is an individual) must have attained the age of 18 on the first payment date; and
    - ii. Only the Owner/insured/beneficiary of the Policy can be the recipient;
  - c) All withdrawal conditions must be satisfied, including but not limited to:
    - i. the intended effective date of the withdrawal must be or after the earliest effective date of the selected withdrawal option (please refer to User Guide for Periodic Withdrawal (Wealth Master Service) for details); and
    - ii. the withdrawal amount for each recipient must not be less than the minimum amount as may be determined by the Company from time to time (currently HKD1,000 or its equivalent in a foreign currency if the policy currency is not Hong Kong dollar);
  - d) There is no unpaid loans and loan interest accrued, or outstanding premium under the Policy;
  - e) If the Policy is subject to collateral assignment/premium financing arrangements, the assignee consents to the set-up or continuance of the Wealth Master Service or amendment of the existing withdrawal instruction(s) under the Wealth Master Service (as applicable);
  - f) There is no outstanding transaction or application for such transaction under the Policy that may impact the policy value including but not limited to other withdrawal requests, loan requests, reduction in Notional Amount, claims for basic plan, Flexi Continuation Option, Flexi Segregation Option or Currency Conversion Option request; and
  - g) The applicant is not the Interim Owner of the Policy.
- (5) The actual withdrawal amount may slightly differ from the requested withdrawal amount as stated in the application due to rounding differences.
- (6) Only one withdrawal instruction can be set up for each recipient. If there are multiple withdrawal instructions to be processed on a withdrawal date, withdrawals will be processed in accordance with the payout sequence as specified in Section 1.2 or Section 2.2 (as applicable). If the withdrawal instruction with respect to one recipient is invalid or terminated, it will not affect the validity of withdrawal instruction(s) with respect to other recipient(s).
- (7) Any withdrawal instruction and change to withdrawal instruction made in this application form will take effect only upon the Company's approval.
- (8) All withdrawal instructions under the Wealth Master Service will be terminated on the earliest occurrence of any of the following:
  - a) The Company approves the termination request for Wealth Master Service submitted by the Owner;
  - b) When there is a change of Owner of the Policy (except taking up of policy ownership by the Interim Owner);
  - c) When any application for the Extended Grace Period Benefit under the policy is approved by the Company;
  - d) When any application to exercise the Flexi Segregation Option, Flexi Continuation Option, or Currency Conversion Option under the Policy is approved by the Company;
  - e) All the withdrawal instructions under Wealth Master Service in respect of the Policy has reached the end of the designated withdrawal duration;
  - f) The Policy is terminated;
  - g) If the Policy is subject to collateral assignment/premium financing arrangement(s), the assignee withdraws its consent to the continuance of Wealth Master Service;
  - h) When there is any indebtedness (including any policy loan or Automatic Premium Loan) under the Policy;
  - i) If, on a withdrawal date, the policy value or the value in the lock-in account of the Policy (as the case may be) is not sufficient to cover the withdrawal amount in respect of a recipient under the selected withdrawal option;
  - j) If, on a withdrawal date, the withdrawal will cause the Notional Amount of the basic plan to fall below the minimum requirement as determined by the Company from time to time (applicable to withdrawal option of “Withdrawal of policy value (reduction of Notional Amount allowed)”); or
  - k) If, on a withdrawal date, the withdrawal will cause the supplement's sum insured to be reduced or the supplement to be terminated due to the reduction of Notional Amount of the basic plan (applicable to withdrawal option of “Withdrawal of policy value (reduction of Notional Amount allowed)”).

- (9) If a recipient ceases to be (i) in such relationship(s) with the Owner of the Policy as permitted by the Company from time to time (applicable to individual-owned policy only); or (ii) the insured or beneficiary under the Policy (applicable to corporate-owned policy only), the Owner shall notify the Company immediately to remove such recipient under the Wealth Master Service. The Company reserves the right to terminate any withdrawal instruction for such recipient under the Wealth Master Service.
- (10) If any recipient(s) has passed away/is incapable of receiving payment, the Owner shall notify the Company immediately to remove such recipient(s) by amending the designation of the recipient(s) under the Wealth Master Service.
- (11) If a death claim is submitted under the Policy, any amount paid to recipients under the Wealth Master Service after the date of the insured's death shall be deducted from the death benefit when it is payable.
- (12) In case there is any inconsistency or uncertainty in relation to any information provided in this form, the Company reserves the right to withhold the processing of the application(s) and/or the payment(s) in relation to all or some of the recipients at our absolute discretion.
- (13) The Company reserves the right to conduct review from time to time in accordance with Anti-Money Laundering and Counter Terrorist Financing Ordinance or other regulatory or internal guidelines and reserves the right to collect necessary relationship proof and any other supporting documents.
- (14) Any application for Wealth Master Service is subject to the Company's approval at its sole and absolute discretion, any applicable laws, regulations and guidelines and the administrative rules of the Company from time to time. The Company reserves the right to amend the terms and conditions of the Wealth Master Service from time to time.

本人，持有人，透過在本表格簽署，謹此確認本人**完全明白並同意**以下所有條款之內容：

- (1) 申請表必須至少在提取預計生效日期前 30 天提交。提取預計生效日期為提取開始年份（或為收款人中最早的提取開始年份，如多於一位收款人）（於 2.2(xii) 部分所註明）的保單週年日。
- (2) 實際支付日期為相關保單週年日（如選擇提取頻率為「每年」）或保單週月日（如選擇提取頻率為「每月」）之後緊接的工作日。「工作日」指香港銀行正常進行銀行業務的日子（星期六除外）。
- (3) 可指定最多 3 名收款人收取提取金額。
- (4) 本保單必須生效並且滿足下列條件：
- 個人持有的保單：
    - 任何收款人（個人）必須於首個收款日年滿 18 歲；及
    - 收款人必須為持有人或與持有人有貴公司不時同意的關係，例如：持有人的配偶、父母、子女、祖父母、兄弟姊妹、未婚夫 / 未婚妻、孫子女、繼子女、岳父母；
  - 公司持有的保單：
    - 任何收款人（個人）必須於首個收款日年滿 18 歲；及
    - 僅限本保單的持有人 / 被保人 / 受益人可成為收款人；
  - 必須滿足所有提取條件，包括但不限於：
    - 提取預計生效日期必須為已選擇的提取選項之最早生效日期或之後（詳情請參閱定期提取（財富管家服務）使用者指南）；及
    - 每名收款人的提取金額必須不少於貴公司可不時釐定的最低金額（目前為 1,000 港元或其等值外幣如保單貨幣不是港幣）；
  - 本保單沒有未償還的貸款及貸款利息或未繳的應付保費；
  - 本保單於抵押品轉讓 / 保費融資安排下，受讓人同意設立或延續財富管家服務或更改財富管家服務下的現有提款指示（如適用）；
  - 本保單沒有任何可能影響保單價值的保單交易或申請有待處理，包括但不限於其他提取申請、貸款申請、申請減少名義金額、基本計劃索償申請、彈性延續選項、靈活分配保單選項或貨幣轉換選項；及
  - 申請人不是本保單的暫託人。
- (5) 由於需要調整為整數，實際提取金額或會與此申請表內之要求提取金額稍有出入。
- (6) 只有一個提款指示可為每名收款人設置。如果於提取日同時有多個提款指示進行，提取順序將根據第 1.2 或 2.2 部分（如適用）指定的支付次序進行。如其中一名收款人的提款指示或付款指示無效或終止，將不會影響其他收款人的提款指示的有效性。
- (7) 本申請表上任何設立或對提款指示作出的更改只會在貴公司批核後生效。
- (8) 財富管家服務下的所有提款指示將在以下最早情況被終止：
- 本公司批准由持有人提交的終止申請財富管家服務之申請；
  - 當本保單更換持有人（暫託人接替持有保單除外）；
  - 當本保單有任何延長寬限期保障之申請被貴公司批准時；
  - 當本保單有任何行使靈活分配保單選項、彈性延續選項或貨幣轉換選項之申請被貴公司批准時；
  - 本保單財富管家服務下所有提款指示已達至指定的提取期終結；
  - 本保單終止；
  - 本保單於抵押品轉讓 / 保費融資安排下，受讓人撤回延續財富管家服務的同意；
  - 當本保單有任何貸款（包括任何保單貸款或自動保費貸款）；
  - 如於提取日，本保單的保單價值或鎖定戶口價值（視情況而定）不足以就所選的提取選項支付收款人的提取金額；
  - 如於提取日，提取將會使基本計劃的保單名義金額低於貴公司可不時釐定的最低要求（適用於提取選項為「提取保單價值（允許減少名義金額）」）；或
  - 如於提取日，提取將會使基本計劃的名義金額減少（適用於提取選項為「提取保單價值（允許減少名義金額）」），導致附加保障的保額將被減少或附加保障將被終止。
- (9) 當收款人不再 (i) 與本保單的持有人有貴公司不時同意的關係（只適用於個人持有的保單）；或 (ii) 是本保單的被保人或受益人（只適用於公司持有的保單），持有人應立即通知貴公司於財富管家服務下刪減該名收款人。貴公司保留終止財富管家服務下任何該收款人提款指示的權利。
- (10) 如果任何收款人已過世 / 無力接收付款，持有人應立即通知貴公司更改財富管家服務下收款人的指定以刪減該名收款人。
- (11) 如本保單的身故賠償索償已被遞交，於支付時任何於被保人身故日後給予財富管家服務下收款人的款項將於身故保險賠償中扣減。
- (12) 如果與此表格提供的任何資料存在任何不一致或不確定之處，貴公司將保留暫停處理申請及 / 或付款（包括全部或部分收款人）的絕對權利。
- (13) 貴公司保留根據「打擊洗錢及恐怖分子資金籌集條例」或其他監管或內部指引不時進行審查的權利，並保留收集必要的關係證明及任何其他證明文件的權利。
- (14) 貴公司可以其全權及絕對酌情權予以批准財富管家服務之任何申請，而申請須符合任何適用的法律、法規及指引，並受限於貴公司不時的行政規則。貴公司保留不時修改財富管家服務之條款及條件的權利。

**4. PERSONAL INFORMATION COLLECTION STATEMENT 收集個人資料的聲明**

Please visit our website ([www.axa.com.hk](http://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](http://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。

**5. DECLARATIONS AND AGREEMENTS 聲明及協議**

**I HEREBY CONFIRM** that I am not acting on behalf of any other person for this 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) the application(s) shall only take effect provided all of the following conditions are met (i) the application(s) is/are approved by the Company at the Company’s Office during the lifetime of the person or persons insured under the Policy while the Policy is in effect; and (ii) I am/We are legally entitled to the amounts to be withdrawn under the Policy, and that no proceedings in bankruptcy or insolvency have been instituted or are pending against me/Us;
- (2) the application(s) is/are based on my/Our own judgement and I/We have not relied on any advice provided by any insurance agent;
- (3) all information in the application(s) whether or not written by my/Our own hand is to the best of my/Our knowledge and belief complete and true;
- (4) where I/We have provided the personal data of other Relevant Persons to the Company in this application form or in any ways provided to the Company for or relating to this application, or for or relating to the future services in connection with this application, (a) I/We have obtained the personal data from the Relevant Persons lawfully; (b) I/We have notified the Relevant Persons of the Company’s Privacy Policy<sup>#</sup> and the relevant data collection document (being this application form or any other documents provided to the Company for this application) and obtained all necessary consent from the Relevant Persons for the data processing (including provision of personal data to the Company) as set out in the Company’s Privacy Policy<sup>#</sup>; (c) I/We will assist the Company to obtain all necessary consent from the Relevant Persons if the processing of personal data of the Relevant Persons goes beyond the original scope of consent provided by them; (d) I/We acknowledge and understand that a minor is a person under 14 (in Mainland China) or 18 years old (in Hong Kong) under applicable data protection law, and I/We am/are (or I/We have been authorised by) the guardian of the Relevant Person who is a minor, or I/We have been authorized by the Relevant Person who is not a minor (e.g. individuals aged 14-17 years old located in Mainland China) to give necessary consent on his/her behalf; and (e) I/We have taken reasonably practicable measures to ensure that the personal data I/We provide to the Company is accurate and complete;
- (5) I/We have read and understand all the Important Notes and Terms and Conditions listed in this application form and agree to be bound by these terms and conditions;
- (6) 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.

<sup>#</sup> The Privacy policy is available here: <https://www.axa.com.hk/en/legal>

**I HEREBY AUTHORIZE** on behalf of the Relevant Persons the Company to give either the Insurance Authority or other parties the relevant records or information as required. 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) 此申請需符合下列條件後方可生效 (i) 申請是於本保單有效期間內被保人在生之情況下經貴公司在公司辦事處批核 (ii) 本保單之提取金額為本人 / 我們合法所擁有，及本人 / 我們現未有或沒有尚未判決因破產或清盤之訴訟；
- (2) 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；
- (3) 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；
- (4) 就我 / 我們在本申請表或以任何方式，為本申請或與之相關，或為本申請有關未來服務或與之相關而向 AXA 安盛提供其他相關人士的個人資料，(a) 我 / 我們已合法地從相關人士取得個人資料；(b) 我 / 我們已通知相關人士 AXA 安盛的私隱政策<sup>#</sup> 及有關資料收集文件（即本申請表或為本申請而向 AXA 安盛提供的任何其他文件），並取得相關人士對 AXA 安盛私隱政策<sup>#</sup> 所述的資料處理（包括向 AXA 安盛提供個人資料）的一切必要同意；(c) 如對相關人士的個人資料的處理超出了相關人士原先提供的同意範圍，我 / 我們將協助 AXA 安盛取得相關人士的一切必要同意；(d) 我 / 我們確認並理解，根據適用的保障資料法律，未成年是指未滿 14 歲（在中國大陸）或未滿 18 歲（在香港）的人士，以及我 / 我們是未成年的相關人士的監護人（或我 / 我們已獲未成年的相關人士的監護人授權），或我 / 我們已獲非未成年的相關人士（例如，身處中國大陸的 14-17 歲的個別人士）的授權，可代表他 / 她作出必要的同意；及 (e) 我 / 我們已採取合理可行的措施，確保我 / 我們向 AXA 安盛提供的個人資料是準確和完整的；
- (5) 本人 / 我們已閱讀並明白所有此申請表上的重要事項及聲明及條款及細則，而且同意受此條款和細則的約束；
- (6) 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。

<sup>#</sup> 在此取得私隱政策：<https://www.axa.com.hk/zh/legal>

**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本保單的給付金額及 / 或貴公司為本保單所收金額中，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。

**6. SIGNATURE 簽署**

Signature of Owner* 持有人簽署 *	
Signature of Irrevocable Beneficiary* 不可撤銷受益人簽署 *	
Signature of Assignee (If Applicable) 受讓人簽署	
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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**7. DOCUMENT CHECKLIST 所需文件指引**

	Documents Required (Please ✓ against the documents you submitted) 所需文件 (請 ✓ 您已提交的文件)
Set-up of Periodic Withdrawal (Wealth Master Service) 設立定期提取 (財富管家服務)	<p><u>Owner 持有人</u></p> <p><input type="checkbox"/> Important Facts Statement – Policy Replacement (if applicable) 重要資料聲明書 – 轉保 (如適用)</p> <p><u>Recipient 收款人</u></p> <p><input type="checkbox"/> Copy of the Recipient's identification proof (if not provided before) 收款人身份證明文件副本 (若之前未曾提交)</p> <p><input type="checkbox"/> Residential address proof (issued within past 3 months from the date of submission) 住宅地址證明 (發出日期必需為申請遞交日期 3 個月內)</p> <p><input type="checkbox"/> Bank account proof (e.g. bank book, copy of debit card) which shows account holder name and account number (if select autopay or telegraphic transfer 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 (如選用自動轉帳或電匯為付款指示)</p> <p><input type="checkbox"/> Telegraphic Transfer Request Letter (if select telegraphic transfer as payment instruction) 電匯申請書 (如選用電匯為付款指示)</p> <p><input type="checkbox"/> Supplement – Tax Residency Self-Certification for Individual (if applicable) 資料補充—稅務居民身份自我證明 (個人) (如適用)</p> <p><input type="checkbox"/> Relationship proof (submit upon request by the Company) 關係證明文件 (在本公司要求下提交)</p>
Addition of Recipient(s) (mandatory)/ Replacement of Recipient(s) (mandatory)/ Update Information and/or Payment Instruction of Existing Recipient(s) (if applicable) 新增收款人 (必須) / 取代收款人 (必須) / 更新現有收款人資料及/ 或付款指示 (如適用)	<p><u>Recipient 收款人</u></p> <p><input type="checkbox"/> Copy of the Recipient's identification proof (if not provided before) 收款人身份證明文件副本 (若之前未曾提交)</p> <p><input type="checkbox"/> Residential address proof (issued within past 3 months from the date of submission) 住宅地址證明 (發出日期必需為申請遞交日期 3 個月內)</p> <p><input type="checkbox"/> Bank account proof (e.g. bank book, copy of debit card) which shows account holder name and account number (if select autopay or telegraphic transfer 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 (如選用自動轉帳或電匯為付款指示)</p> <p><input type="checkbox"/> Telegraphic Transfer Request Letter (if select telegraphic transfer as payment instruction) 電匯申請書 (如選用電匯為付款指示)</p> <p><input type="checkbox"/> Supplement – Tax Residency Self-Certification for Individual (if applicable) 資料補充—稅務居民身份自我證明 (個人) (如適用)</p> <p><input type="checkbox"/> Relationship proof (submit upon request by the Company) 關係證明文件 (在本公司要求下提交)</p>

**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。**

AXA China Region Insurance Company (Hong Kong) Limited/ AXA China Region Insurance Company Limited

安盛金融保險 (香港) 有限公司 / 安盛金融有限公司

Customer Service Centre Suite 2001, 20/F, Tower Two, Times Square, 1 Matheson Street, Causeway Bay, Hong Kong

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