

AIA International Limited

(Incorporated in Bermuda with limited liability)

REQUEST FOR INVESTMENT-LINKED / UNIVERSAL LIFE PLAN SERVICES

投資連繫式/萬用壽險計劃服務申請表

基金提取之申請接受後,除非於第四項列明,否則自動平衡投資(如有)將會自動取消。

Policy Number 保單號碼	Name of Insured 受保人姓名	Name of Owner 持有人姓名
Agent /Broker Name 營業員/經紀姓名	Agent/Broker Code營業員號碼/經紀號碼 Area/Agency/Broker Code 區域/營業員/經紀組別編號	Agent's /Broker Tel. No 營業員/經紀聯絡電話



01482076

IMPORTANT NOTES: 注意事項

- 1.Please submit the Top-up Premium/ Fleximoney together with this form to Cashier during the Company's service hours (Monday to Friday 8:45a.m. 5:15p.m. except public holidays) 請將額外投資保費/靈活錢戶口連同此表格於本公司的服務時間內遞交到繳費處(星期一至五上午八時四十五分至下午五時十五分。公眾假期除外)
- 2. If investment allocation is changed, submit regular premium together with this form to Cashier during the Company's service hours (Monday to Friday 8:45a.m. 5:15p.m. except public
- holidays)如需更改投資分配,請將基本保費運同此表格於本公司的服務時間內遞交到繳費處(星期一至五上午八時四十五分至下午五時十五分。公眾假期除外)
 3. Receipt of this form by AIA Representative or your broker does not constitute receipt by the Company. Your request will be processed only after this form is received and accepted by the Company. 友邦業務代表或您的經紀收到此申請表並不代表本公司亦已收到,您的申請會於本公司收妥此表格及接納後處理。
- 及为来扬气农及高的控制化对加工中间农业工气农水区切形L水到,怎的中间直接不好可以发现农民政政的政策的处理。

 4. Once the form is submitted to the Company, whether through our AIA Representative or your broker or otherwise, you cannot withdraw or change any of the instructions provided on the form. Any change of instructions will be treated as a new request, which will be processed after the former request is effected by the Company. 此表格一經遞交給本公司,不論是經由友邦業務代表、您的經紀,或由其他途徑遞交,您便不能取消或更改表格上的任何指示。任何更改,將被視作一項新申請,而該新申請會在本公司將您先前的申請辦妥後處理。

 5. The Company will process your withdrawal or switching requests based on your current available investment option unit balance. For the avoidance of doubt, any investment option unit(s) the processing instruction in lower switching requests based on your current available investment option unit balance. For the avoidance of doubt, any investment option unit(s)
- relating to processing instruction is/are excluded. 本公司將會按您現有之投資選擇單位處理您的提取/轉換指示。為免產生疑問,所指之投資選擇單位並不包括仍在處理中之單位
- 6. The instructions will be processed on the next dealing date after it is approved by the Company. 指示經本公司批准後,於下一個交易日進行。
- 7. For transfers/swtiches/withdrawals, the transaction will not be performed until the date on which the latest valuation (if applicable) is confirmed or our notification letter is issued, whichever is the later. 有關調撥/調配/提取的指示,其交易需待最後的評估日(如適用)被確定或於我們發出通知書的日期後才進行,以較遲者為準。
- 8.Transfer of policy values between different accounts within the same policy and/or from one policy to the other, any transaction involved will not be performed until the date on which the latest valuation (if applicable) is confirmed or our notification letter is issued, whichever is the later. 如將保單的價值在同一保單內的不同戶口作調撥及/或從一份保單轉移至其他保單,有關交易需待最

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	funit 提取單位	<u> </u>			For e-Bankin designated b		ayment will be transferred to the		
*Code 代號	No. of units	•	*Code 代號	No. of units	已登記使用"電子入賬服務"之客户,本公司會將款項 If e-BankIn has not been registered, we will pay the 如未有登記使用"電子入賬服務",本公司會以支票支		,本公司 會將款項轉 入至指定之銀行		
1 (功元	單位數目		1人9元	單位數目			d, we will pay the cheque in: 本公司會以支票支付, 貨幣選擇為:		
=					○ Hong Kong Dollar 港元 ○ Policy Currency				
=					# Send cheque to: #請將支票:				
= =				 	My correspondence address registered with the company 寄往本人於公司登記的通訊地址 The above-named agent / broker 滅送給以上營業員網紀				
=			=	=	# If not indicated	above, the cheque will	be sent to the Owner's correspondence add		
Withdraw the above u	nits to update premi	ums and levy (for Hong Kong polici	es) for the above policy due		示,支票會寄往保單持有	人的通訊地址		
━ 	 新付上沭保單之保費與	イン 1保費御費(香	· 港保單適用),到期	日為	(MM月/DD	日/YYYY年)			
Repay the loan on poli				(US\$/HK\$	(, ;)			
Pay the premium and	or levy (for Hong Ko	ong policies) of	f other policies due o	n 繳付以下保單號碼到期之	保費及/或保費價	費(香港保單適用)			
Policy No. 保軍號碼	Premium due dat	e 保費到期日	Relationship with	owner 與保單持有人之關係	之關係 Outstanding Levy 尚欠保費徵費 Currency / Amount 貨幣 / 싌				
Pay the initial deposit	for New Application	繳付新保單作	首期之按金						
Application No. 新保	軍申請號碼		Applicant's	Applicant's name 申請人姓名		Currency / Amount 貨幣 / 金額			
Pay the policy adjustm	ent 繳付更改保單之	費用							
Policy No. 保單號碼			Relationship with owner 與保單持有人之關係			Currency / Amount 貨幣 / 金額			
-									
Pay the AIA Vitality me	embership fee 繳付A	NA Vitality健康	程式會費			1			
AIA Vitality Membership No. AIA Vitality 健康程式會員編號 Relationship with in:		n insured 與受保人之關係	nsured 與受保人之關係		Currency / Amount 貨幣 / 金額				
AIR THAIR PERME									
rawal of units to update prer	anticona a serial laces of	1	Catalan and a state of the			- 4 : - 04 4 *	41		

	Poli	cy Number 保單	號碼							
2. Pay Top-Up Premium (Unsched				*Code 代號			tment Alloo 投資分配	cation		
US\$美元金額							0/			
For Treasure Master <u>卓達之選 \ Treasure Master Select 卓達智富 \ Treasure Master Plus卓達智悅</u>										%
Minimum Top-up Premium= US\$4,000 最低額外投資保費=4,000美元							=			%
Please submit Important Facts Statement and Applicant's Declarations Form, Financial Needs Analysis Form										%
and Risk Profile Questionnaire. Further do and Counter-Terrorist Financing (Financial							-			%
要資料聲明書及申請人聲明書、財務需要分析表	長格及風險承擔能力問卷。因									%
構)條例」或其他監管條例所要求下,而有可能 							=			%
Please indicate your allocation every time unsched invested according to the existing allocation for Ro所緣金額將按照現時基本保費之投資分配作投資。						=		[%]		
Minimum allocation to a selected fund is 10% 所選擇的每項基金投資分配不得少於10% For Hong Kong policies, the amount paid in by you will first be used to settle the required levy, and the balance 若為香港保單,閣下所繳付之金額將先行用作繳付保費徵費,餘額將用作投資。				ed for investmer	π. – – –	 tal 共	=	=	100	[%] %
3. □ Switching 調配			4. 🗆 C	hange Inv			ation	更改		7.
_	1 0. 4.4.4	去亩.4.C. ¬		- for Re	gular pren	nium and	/ or Re			u
<u>Switch out 轉換出</u>	Switch In	<u>轉換人</u>		- 基本保	費及/或定算					
*Code No of units 代號 單位數目	*Code	Percentage 百份率		O	With / Co 設立/繼續			alanc	ing	
105% 华达数日	代號	口切平	Stop Auto-Rebalancing							
	=			**	取消自動 ³ ode	半衡投資 Investr	ment Al	llocativ	on	
	=				就 號		投資分配			
=	=					=			%	
=	=					=			%	
=	=					=			%	
=	=					=			%	
=	=					=			%	
=	=					=			%	
=	=								%	
=	=								0/	
=	=								70	
=	=					=			%	
				Total	共	=	100		%	
Unless specified in Part (4), the current investi 除非列明於第四項,現有的投資分配將維持不變。	ment allocation remains unc	changed.	Minimum 於10%	allocation to	a selected	code is 10	0% 所選	擇的每	珂代號之 分	配不得少
Auto-Rebalancing will be automatically cancel continue auto-rebalancing, please specify in P	led once request for switich	ing is accepted. To	Auto-Reb changed,	alancing will unless speci	fied above.					
否則自動平衡投資(如有)將會自動取消。 			更以投資分	分配後,除非於	》上述列明,	否則目動 ⁻	半便投資	【例月)粉質日馴り	以相。
Applicable to Treasure Master Plus or	, , , , , , , , , , , , , , , , , , ,	-	(a) 4h a4 h al a	(a) 4a a bia	.b.s ulalı laı	46		4-1		
Unless the following confirmation is specified be accepted. 除非閣下作出以下的確認,否則任何	可投資于風險級別高於閣下的風	人險承擔能力級別的投資	選擇均不會	被接納。		-				
□ Despite the fact that the features and/or ris disclosed needs & risk profile as indicated request(s) 儉替根據本人於「財務需要分析」 執行有關申請。	k level of my selected under in the Financial Needs Anal	rlying investment che lysis and Risk Profile	oices, as sta Questionna	ated in Part 3 aire, I confirm	above, may that it is m	y not be so ny intentio	uitable n and c	for me Jesire	based on to proceed	my d with my
request(s).儘管根據本人於「財務需要分析」 執行有關申請。	及「風險承擔能力問卷」所按問	露的需要及投資風險概	况,本人於第	第三項中選擇的	相關投資選	擇可能並不	一適合本	人,但	本人確認打	「算及意欲
5. Change Regular Top-Up Pre										
Please submit Important Facts State				ds Analysis	Form and	Risk Prof	ile Que	estion	naire. Fur	ther
document may be required pursuan	t to the Anti-Money Laund	ering and Counter-	Terrorist Fi	nancing (Fin	ancial Ins	titutions)	Ordina	ance c	or other	
regulatory requirement. 請遞交重要到 或其他監管條例所要求下,而有可能需		, 	人風險承擔形	5.刀间苍。囚风	11季70多	爱 及恋神为	一页金	湯果し	、金融機構)	1味79]」
Applicable to Planned Premium Investi				olicable to No						only:
Please select one below and specify the based on the mode of payment of your		um amount		gular top-up p ardless of the						e
只適用於投資連繫式壽險之定存保費:	spe	cify the new r 角用於投資連	monthly reg	jular top-u	ıp prem					
請選擇以下其中一項並列明新的額外投資保費金額;此保費金額是根據閣下保單的 繳費形式而定:				明額外投資保 R單的基本計	貴金額只接 劃是何種繳	受月供形式 費形式)。	式並經由	∃每月	自動轉賬付	款(不
○ Monthly Regular Top-Up Premium 每月定期額外投資保費為US\$ 美元金額 (Minimum = US\$45 最少為45美元)				们明新的每月短	E期額外投	資保費金額	頁:			
US\$ 美元金額										
Quarterly Regular Top-Up Premium 每季定期額外投資保費為										
US\$ 美元金額(Minimum = US\$140 最少為140美元) Semi-annual Regular Top-Up Premium 每半年定期額外投資保費為			C) Monthly Re	gular Top-	Up Premiu	um 每月]定期	額外投資係	R費為
US\$ 美元金額	(Minimum =US\$255 最									
Annual Regular Top-Up Premiun				US\$ 美元。	金額					
US\$ 美元金額	(Minimum = US\$500 }	最少為500美元)		(Minimum		最少為10	0美元)			
For Hong Kong policies, the amount of	aid in hy you will first he use	d to settle the require	ed levv and	the halance	will he ann	ied for inv	estmer	nt		
For Hong Kong policies, the amount pa 若為香港保單,閣下所繳付之金額將先	行用作繳付保費徵費,餘額	将用作投資。	,, and	30.01100	20 appi	,	,	•-		

Policy Number 保單號码						
6. □ Other instructions 其他指示						
PART B 乙部 Universal Life Plan 萬用壽險計劃 / Fleximoney 靈活錢戶口						
1. ☐ Withdrawal of Account Value / Fleximoney 提取戶口金額/靈活錢戶口	2. Pay Fleximoney 繳付靈活錢戶口					
US\$ 美元金額 For e-Bankin customers, the payment will be transferred to the designated bank account.						
已登記使用"電子入賬服務"之客户,本公司會將款項轉入至指定之銀行户口。						
If e-BankIn has not been registered, we will pay the cheque in: 如未有登記使用"電子入賬服務",本公司會以支票支付,貨幣選擇為:	US\$ 美元金額					
#Send cheque to: #請將支票:	Minimum Contribution = US\$500 供款最少為美元500					
 ○ Hong Kong Dollar 港元 ○ My correspondence address registered with the company 寄往本人於公司登記的通訊地址 ○ Policy Currency 保單貨幣 ○ The above-named agent / broker 遞送給以上營業員/經紀 	For Hong Kong policies, the amount paid in by you will first be used to settle the required levy, and the balance will be applied for investment.					
# If not indicated above, the cheque will be sent to the Owner's correspondence address	若為香港保單,閣下所繳付之金額將先行用作繳付保費徵費,餘額將用作投資。					
#如沒有註明指示,支票會寄往保單持有人的通訊地址						
PART C 丙部 Dollar Cost Averaging Option 平均成本選項 (For Treasure Master						
 ○ Add / Change Dollar Cost Averaging Monthly Contribution to 設立/更改「每月平均成本投資」至 	○ Change Dollar Cost Averaging (DCA) Allocation 更改「每月平均成本投資」基金投資分配					
	* Code Investment Allocation 代號 投資分配					
US\$美元金額	=%					
The minimum DCA Monthly Contribution is US\$1,000. 最低「每月平均成本投資」為1,000美元。	= %					
取似,每月平均放平仅具」為1,000美儿。						
Cancel Dollar Cost Averaging Monthly Contribution	=%					
取消「每月平均成本投資」	=%					
	=%					
Note: For addition of investment into Dollar Cost Averaging Option (DCA), please cont premium to "Unscheduled Top up Premium" in Part A (2) and allocated to the designat						
Money Market Investment option for DCA as indicated in the Investment Option brochu	re. = %					
如需增加投資作為平均成本選項(DCA)之用,請填寫甲部(2)繳付額外投資保費(不定期) Total 共 = 100並分配至投資選擇小冊子內列名為適用於 DCA「指定貨幣基金投資選擇」。 Minimum allocation to a selected code						
PART D 丁部 Internet Service 網上服務	所選擇的每項代號之分配不得少於10%					
□ AIA e-Invest 友邦投資易 (For Investment-Linked Products Only) (只適用於投資)	1 東北部)					
Apply for Internet Service "AIA e-Invest" to submit instructions for change of investm policy numbers, if specified below, subject to the Terms and Conditions of "AIA e-In 申請「友邦投資易」網上服務,提交以上保單及其他下列保單號碼(如有)之更改投資 "AIA e-Invest" is not applicable if the appointed Financial Intermediary is not AIA or 若獲委任之「金融中介機構」並非友邦保險或友邦保險不時決定的表列「金融中介機	nent allocation and switching for the above policy and any other livest". 分配及轉換指示,並根據「友邦投資易」的條款及條件所使用。 any other selected entity as determined by AIA from time to time.					
Other policy number(s) 其他保單號碼:						
□ AIA e-Advice 「友邦電子通知書」 Apply for Internet Service "AIA e-Advice" to suppress physical copies of the selecte	d correspondences and subject to the Terms and Conditions of					
"AIA e-Advice", via AIA Customer Corner, to view / download the softcopies for the subject to the Terms and Conditions of "AIA e-Advice". Upon approval of the AIA e-related correspondences under the terms of the policy contract or otherwise will b other channel(s) where AIA considers appropriate.	above policy and any other policy number(s), if specified below, Advice application, the current channel for receiving / delivering					
申請「友邦電子通知書」網上服務,提交以上保單及其他下列保單(如有)號碼之停止示,並根據「友邦電子通知書」的條款及條件使用。當「友邦電子通知書」申請獲批道的條文將即時由「友邦電子通知書」或其他友邦認為適當的渠道代替,並不作另行	收取個別通知書並透過友邦客戶專頁閱覽或下載個別通知書指 准後,現於保單契約或其他契約內有關收取/發出相關通知書渠 通知。					
Other policy number(s) 其他保單號碼:						
To apply for the Internet Service, please provide your email address below. 申請網	上服務,請於下列位置提供電郵地址。					
Email address 電郵地址						
DECLARATION 聲明						
(i) I have read and understood the contract and principal brochure for the fund/investment (for investment-linked plans) and the applicable fees and 本人已詳閱及完全明白有關保單的契約及主要銷售刊物,包括與投資連繫。 (ii) For investment-linked plans, I have evaluated the level of risk of the ur	charges. 式計劃相關之連繫基金/投資及適用的費用及收費。 nderlying fund/investment myself and have selected the					
investment options for the purposes of the policy based on my own judge 本人亦已評估投資連繫式計劃各連繫基金/投資之風險水平。本人依據本人	ment and personal needs. 的判斷和個人需要作出此保單之投資選擇。					

	Policy Number 保單號碼			
(iii) Applicable to payment in cheque 適用於以 I understand that any benefits payable und Information Page of the Policy or, if applicable to receive any such benefits in a currency of by the Company at its discretion. I understar in the Opted Currency, I will bear the necess basis of the Company's internal exchange rat 本人明白所有保單利益之款項將根據保單資料期的保單貨幣以外的貨幣("選擇貨幣")作為收何保單下所作出的利益款項以"選擇貨幣"支付換率而釐定。	der the Policy will be paid in e, the appropriate subsequent her than the latest policy current and and agree that should I opt sary exchange difference, sucless as at the time of the relevan	endorsement. Accordingly (the "Opted Cultor for payment of any londifference being dent currency conversion)	ordingly, the proverency") is solely benefits payable etermined by the	vision of the option y a service offered e under the Policy e Company on the
(iv) Applicable to Part D only. I hereby confirr of AIA e-Invest and / or AIA e-Advice, whiche Corner (www.aia.com.hk). 只適用於丁部。本人確實已閱讀及明白「友邦 條款及條件之詳情,請登入www.aia.com.hk之	ver is applicable. For details o 没答易」或/及「友邦電子涌知	f the Terms and Con	nditions, please v	visit AIA Customer
(v) I understand that some Investment Optic investment income, capital gains, capital of the underlying fund. Accordingly, this may in the account value is reduced to zero, the guarantee that these Investment Options will dividend at a periodic frequency. 本人明白部份投資選擇有機會會派發現金股息金的浄資產值減少。因此,有關保單戶口價值本人亦了解該些投資選擇並不保證會否派發現	he corresponding underlying for turn reduce the account value basic policy will be terminate distribute cash dividend, distribute vash dividend, distribute to be	und may result in a cap a surrender values a sed. I also acknowle ibute fixed amount confirmation of the	decrease in the and death benefiedge and agree of cash dividend 派發的現金股息	net asset value of its of the policy. If that there is no or distribute cash 有機會令該連繫基
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