

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

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



01482047

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) 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。
- 4. Once the form is submitted to the Company, whether through our All 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)
- 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完成,以較遲者為準。

PART A 甲部 Investment-Linked Plan 投資連繫式計劃 Withdrawal of unit 提取單位 2. Pay Top-Up Premium (Unscheduled) 繳付額外投資保費(不定期) US\$美元金額 No of units For e-Bankin customers, the *Code 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,本公司會將數項轉入至指定之銀行户口。 Minimum = US\$100 額外投資保費最少為100美元 代號 單位數目 For Treasure Master 卓達之選 \Treasure Master Select 卓達智富 \ Treasure Master Plus卓達智悅 If e-BankIn has not been registered, Minimum Top-up Premium= US\$4,000 最低額外投資保費=4,000美元 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: Please submit Important Facts Statement and Applicant's Declarations Form, Financial Needs Analysis Form and Risk Profile Questionnaire. Further ○ Hong Kong Dollar 港元 document may be required pursuant to the Anti-Money Laundering and Counter-Terrorist Financing (Financial Institutions) Ordinance or other regulatory requirement. 請遞交重要資料聲明書及申請人聲明書、財務需要分析表格 Policy Currency 保單貨幣 # Send cheque to: #請將支票: 及風險承擔能力問卷。因應「打擊洗錢及恐怖分子資金籌集(金融機構)條例」或其他 My correspondence address registered with the company 寄往本人於公司登記的通訊地址 監管條例所要求下,而有可能需要遞交其他文件。 Investment Allocation *Code The above-named agent / broker 遞送給以上營業員/經紀 投資分配 代號 # If not indicated above, the cheque will be sent to the Owner's correspondence address # 如沒有註明指示,支票會寄往保單持有人的通訊地址 Withdraw the above units to update premium for the above policy due on 提取上述之單位用作繳付上述保單之保費,到期日為 Withdrawal of units to update premium should be submitted to the Company within the grace period ie. 31 days from the premium due date. 提取單位用作繳交保費,需要在寬限期內(即保費到期日31天內)交回本公司。 Withdrawal amount is subject to the minimum required amount and account balance. 需符合最低提款金額及提款後之最低戶口總結餘之要求。 Auto-Rebalancing will be automatically cancelled once request for fund withdrawal is accepted. To continue auto-rebalancing, please specify in Part (4) 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。 Total 共 100 Please indicate your allocation every time unscheduled top-up premium is paid. If allocation is not specified, money will be invested according to the existing allocation for

Regular Premium. 每次繳付不定期額外投資保費必須填上基金投資分配,如沒有註明,所繳金額

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%

將按照現時基本保費之投資分配作投資。

3. S	witching 調	記			4. Change Investment Allo	cation 更改投資分配
Switch out 轉換出		Switch In 轉換入		- Ion Regular permuni and ror Regular top up - 基本保費及/或定期額外投資保費		
	*Code 代號	No of units 單位數目	*Code 代號	Percentage 百份率		ontinue Auto-Rebalancing 續自動平衡投資
	= = =	: :		=	Stop Auto-Rebalancing 取消自動平衡投資	
	 			=	*Code 代號	nvestment Allocation 投資分配
				=	=	%
	=======================================			=	=	%
	=	:		=	=	%
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	-	:		=	= =====================================	%
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	=	:		=	Total 共 =	100 %
除非列明於 Auto-Reba accepted.	《第四項,現有的 alancing will be To continue au	投資分配將維持不變。 automatically cance to-rebalancing, pleas	tment allocation remain lled once request for sv se specify in Part (4). 助平衡投資(如有)將會自重	vitiching is	Minimum allocation to a selected code 所選擇的每項代號之分配不得少於10% Auto-Rebalancing will be automaticall allocation is changed, unless specifie 更改投資分配後,除非於上述列明,否則動取消。	y cancelled if investment
5. Ch	ange Regula	ar Top-Up Premi	um Amount 更改定	官期額外投資保費会	· 金額	
Please submit Important Facts Statement and Applicant's Declarations Form, Fina document may be required pursuant to the Anti-Money Laundering and Counter-Touregulatory requirement. 請述交重要資料聲明書及申請人聲明書、財務需要分析表格及風險承擔能力問卷。因應「下,而有可能需要遞交其他文件。 Applicable to Planned Premium Investment-Linked Plan only: Please select one below and specify the new regular top-up premium amount based on the mode of payment of your policy: 只適用於投資連繫式壽險之定存保費: 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: Monthly Regular Top-Up Premium 每月定期額外投資保費為 US\$美元金額			errorist Financing (Financial Institutions) Ordinance or other			
		Regular Top-Up Prem	(Minimum = 05\$145) nium 每半年定期額外投資 (Minimum =US\$255 最	f 保費為	Monthly Regular Top-Up Premiur	m 每月定期額外投資保費為
)Annual Regul US\$ 美元金額		每年定期額外投資保費為 (Minimum = US\$500 :		US\$ 美元金額 (Minimum = US\$100 最少為100	
	ther instructions。 3 乙部 Uni		髙用壽險計劃 / Flexi	money 靈活錢戶口	1	
1. Wit	thdrawal of A	ccount Value/Flex	imoney 提取戶口金額	/靈活錢戶口	2. Pay FlexiMoney 繳付靈活	護戶口
US	\$ 美元金額 _			_		
2登記使用"電	子入賬服務" 之客户 s not been registere 澤為:	中,本公司會將款項轉入至 d, we will pay the cheque	in: 如未有登記使用"電子入賬			
O Policy Cur	g Dollar 港元 rrency 保單貨幣	O The above-named ag	將支票: ddress registered with the co 的通訊地址 ent / broker 遞送給以上營業員 Dwner's correspondence ad	員/經紀	US\$ 美元金額 Minimum Contribution = US\$500) 供款最少為美元500

Policy Number 保單號碼

PA	RT C丙部 Dollar Cost Averaging Option 平均成本選項 (For Treasure Master\Treas	sure	Master Select only 只適用於卓達之選\卓達智富)
0	Add / Change Dollar Cost Averaging Monthly Contribution to 設立/更改「每月平均成本投資」至	0	Change Dollar Cost Averaging (DCA) Allocation 更改「每月平均成本投資」基金投資分配 * Code 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。		= %
_			= %
\bigcirc	Cancel Dollar Cost Averaging Monthly Contribution 取消「毎月平均成本投資」		= % = %
	取 信 每月十岁 以 华汉县]		
pre	te: For addition of investment into Dollar Cost Averaging Option (DCA), please contribute emium to "Unscheduled Top up Premium" in Part A (2) and allocated to the designated oney Market Investment option for DCA as indicated in the Investment Option brochure.		=%
	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)並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」。		= % Total 共 = 100 % Minimum allocation to a selected code is 10% 所選擇的每項代號之分配不得少於10%
PA	RT D 丁部 Internet Service 網上服務		
	AIA e-Invest 友邦投資易 (For Investment-Linked Products Only) (只適用於投資連繫式	計劃	
	Apply for Internet Service "AIA e-Invest" to submit instructions for change of investment al policy numbers, if specified below, subject to the Terms and Conditions of "AIA e-Invest". 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)之更改投資分配及"AIA e-Invest" is not applicable if the appointed Financial Intermediary is not AIA or any otl 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「金融中介機構」,	b轉掛 her s	與指示,並根據「友邦投資易」的條款及條件所使用。 selected entity as determined by AIA from time to tim
	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 selected corr "AIA e-Advice", via AIA Customer Corner, to view / download the softcopies for the above subject to the Terms and Conditions of "AIA e-Advice". Upon approval of the AIA e-Advic related correspondences under the terms of the policy contract or otherwise will be replother channel(s) where AIA considers appropriate. 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)號碼之停止收取低示,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」申請獲批准後,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,並不作另行通知。	poli e ap aced	cy and any other policy number(s), if specified below plication, the current channel for receiving / deliverind immediately without prior notice by AIA e-Advice of
	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	5,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 policy fund/investment (for investment-linked plans) and the applicable fees and charge (i) 本人已詳閱及完全明白有關保單的契約及主要銷售刊物,包括與投資連繫式記	ges. 十劃 [,]	相關之連繫基金/投資及適用的費用及收費。
	(ii) For investment-linked plans, I have evaluated the level of risk of the underly the investment options for the purposes of the policy based on my own judgem (ii) 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。本人依據本人的	ent	and personal needs.
*	(iii) Applicable to payment in cheque 適用於以支票支付的款項: I understand that any benefits payable under the Policy will be paid in the later Information Page of the Policy or, if applicable, the appropriate subsequent encoption to receive any such benefits in a currency other than the latest policy curoffered by the Company at its discretion. I understand and agree that should I the Policy in the Opted Currency, I will bear the necessary exchange difference Company on the basis of the Company's internal exchange rates as at the time 本人明白所有保單利益之款項將根據保單資料頁或隨後所發出之批註(如適用)所最近期的保單貨幣以外的貨幣("選擇貨幣")作為收取任何此等利益的貨幣只屬貴人選擇任何保單下所作出的利益款項以"選擇貨幣"支付,本人同意承擔所需的兌內部貨幣兌換率而釐定。	dors rren opt f e, su e of f 載 責公言	sement. Accordingly, the provision of the ncy (the "Opted Currency") is solely a service for payment of any benefits payable under uch difference being determined by the the relevant currency conversion. 之最近期保單貨幣為準。因此,提供選擇以司酌情所提供之服務。本人明白及同意如本

Policy Number 保單號碼

(iv) Applicable to Part D only. I hereby confirm that I have read, understood and agreed to be bound by the Terms and Conditions of AIA e-Invest and / or AIA e-Advice, whichever is applicable. For details of the Terms and Conditions, please visit AIA Customer Corner (www.aia.com.hk). 只適用於丁部。本人確實已閱讀及明白「友邦投資易」或/及「友邦電子通知書」(如適用)之條款及條件,並同意受其約束。有關條款及條件之詳情,請登入www.aia.com.hk之友邦客戶專頁參閱。

I / We declare and agree that any contained in this application or collected and utilized in accordar outside of Hong Kong (for policie purposes and to the types of trans	and and understood the AIA y personal data and other in ollected, obtained, compiled note with the AIA PIC. I / We is issued in Hong Kong) or naferee as set out in the AIA	Personal Information Collection State information relating to me / us or my / od or held by the Company by any mean eacknowledge and consent to the tran Macau (for policies issued in Macau), A PIC. om its website: www.aia.com.hk , and i	our policy(ies) or investments ns from time to time may be sfer of my / our personal data as the case may be, for the				
個人資料收集及使用 本人/我們確認本人/我們已閱讀及明白AIA個人資料收集聲明(「AIA個人資料收集聲明」)。本人/我們聲明及同意在本申請所載或貴公司不時以任何方法收集所得、編製或持有的任何個人資料及關於本人/我們或本人/我們的保單或投資的其他資料,可根據AIA個人資料收集聲明收集及使用。本人/我們知悉及同意就AIA個人資料收集聲明所述目的視乎情况轉讓本人/我們的個人資料至香港(如保單在香港繕發)或澳門(如保單在澳門繕發)境外予AIA個人資料收集聲明所載的資料承讓人。 AIA個人資料收集聲明的最新版本可於以下網址下載:www.aia.com.hk,及可向貴公司索取。							
			on				
		Signature of Financial Intermediary 金融中介機構簽名 (if applicable 如適用)	於 MM月/DD日/YYYY年				
Signature of Owner/Trustee 持有人/信託人簽名	on 於 MM月/DD日/YYYY年	Signature of Assignee 受讓人簽名(if applicable 如適用)	on 於 MM月/DD日/YYYY年				
Important Natao							
Important Notes: 1) Signature must correspond with the	Company's existing record	Please refer to the copy of the application fo	orm attached to the Policy or to the				
i , Cignataro muot con copona with the	, company o choming record. I	issues is is to the copy of the application is	min attached to the rolley or to the				

Policy Number 保單號碼

PLEASE SIGN & RETURN IMMEDIATELY BUT NO LATER THAN 14 DAYS 請簽署後即時但不遲於14天內遞交 PLEASE DO NOT SIGN ON BLANK FORM 請勿在空白表格上簽署

* For details of the investment options or underlying funds/investments of the codes, please refer to the 'Underlying Funds/Investments Prices' under the section of Investment Information in the Company website AIA.COM.HK or the Investment Options Brochure.

* 有關代號之投資選擇以及其連繫基金/投資的資料,請參閱本公司網頁AIA.COM.HK投資資料部份之連繫基金/投資價格或投資選擇小冊子。

signature specimen on any document subsequently recorded by the Company.

任何在此表格上的更改,持有人/受讓人/信託人必須於更改在旁位置簽署作實。

簽名須與本公司存案相符。請參閱保單上要保書之影印本或於保單繕發後更換及經本公司確認之簽署。

2) Any amendments in this form must be countersigned by the Owner/Assignee/Trustee in full signature.