



**Request Form for Change of Address /  
Telephone Numbers / Email Address / Apply "AIA e-Advice"**  
**更改通訊地址 / 聯絡電話 / 電郵地址 / 申請「友邦電子通知書」申請表格**




Together we go green! You can submit policy service requests via our mobile app AIA Connect.

You can also contact your Financial Planner to submit requests digitally through iChange.

我們為環境保護盡一分力！您可以使用手機應用程式AIA Connect或聯絡您的財務策劃顧問透過iChange電子方式遞交保單服務申請！

Download AIA Connect by scanning the QR code or contact your Financial planner now!

立即掃描二維碼下載AIA Connect或與您的財務策劃顧問聯絡！

Policy Number 保單號碼	Name of Insured 受保人姓名	Name of Owner 持有人姓名	 P5102017
Area Code 區域編號	Agency / Broker Name 營業員組別 / 經紀名稱	Agent / Broker Code 營業員號碼 / 經紀號碼	
Agency Code 營業員組別編號	Agent / TR's Name 營業員 / 業務代表姓名	Agent / TRs Tel. No. 營業員 / 業務代表聯絡電話	
TR Membership Number 業務代表會員號碼 (For Brokers only 僅供經紀使用)	<input type="checkbox"/> IA <input type="checkbox"/> ANG		

TIPS: Check the checkbox (IA for HK; ANG for Macau) and input the reg. no. using standard format [for HK, it is 2 letters + 4 digits; for Macau, it is 3 letters + 4 digits]  
提示：選取方格 (IA-香港；ANG-澳門) 並填入特定的登記號碼 [香港號碼由2個英文字母 + 4位數字組成；澳門號碼由3個英文字母 + 4位數字組成]

Remark: If the stated AIA financial planner / broker / IFA on this form is not my current servicing AIA financial planner / broker / IFA, I give consent to him/her to handle and follow up my request.  
備註：倘若在上述表格上填寫的財務策劃顧問 / 經紀 / 獨立理財顧問並不是本人目前的財務策劃顧問 / 經紀 / 獨立理財顧問，本人同意他/她處理並跟進我的要求。

**PART A 甲部 Correspondence Address / Telephone Numbers / Email Address 通訊地址 / 電話號碼 / 電郵地址**

You may visit our Company website [www.aia.com.hk](http://www.aia.com.hk) to change your address, telephone number and email address in the AIA Customer Corner.  
閣下可登入本公司網頁 [www.aia.com.hk](http://www.aia.com.hk) 內的友邦客戶專頁更改地址、電話號碼及電郵地址。

**Other Policies 其他保單號碼 (The following policies must belong to the same owner 下列之保單須屬於同一保單持有人)**


Update contact information of AIA Vitality membership (Apply for membership of the policy owner only)  
同時更改「AIA健康程式」會籍聯絡資料 (只適用於保單持有人之會籍)

**Post Office Box is not accepted as Correspondence Address. 恕不接受郵政信箱作為通訊地址。**

Flat / Room 室：  Floor 樓數：  Block 座數：

**Other Countries Telephone Number:**  
其他國家電話號碼：

Mobile 手提	Fixed Line 固網	Country Code 國家號碼	Area Code 地區號碼
<input type="checkbox"/>	<input type="checkbox"/>	( <input type="text"/> ) - ( <input type="text"/> ) - <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	( <input type="text"/> ) - ( <input type="text"/> ) - <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	( <input type="text"/> ) - ( <input type="text"/> ) - <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	( <input type="text"/> ) - ( <input type="text"/> ) - <input type="text"/>	<input type="text"/>

Country / District  
國家 / 地區：

**Telephone Number 電話號碼：**

HK 香港  KLN 九龍  N.T. 新界

**Hong Kong 香港** Mobile 手提：

**Macau 澳門** Office 公司：

Home 住宅：

**U.S. Telephone Number**  
美國電話號碼：

Email Address  
電郵地址：

**Residential Address and Permanent Address will be changed as Correspondence Address stated on this form, otherwise please specify below.**

住宅地址及永久地址將更改至此表格上填寫之通訊地址，否則請於下方列明。

Residential Address 住宅地址

Permanent Address 永久地址

Business Address 辦事處地址




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**Owner's Country / Jurisdiction of Tax Residence** 持有人稅務居住國家 / 司法管轄區：

You must provide the following information 你必須填寫以下資料：

 Tax resident of Hong Kong only 唯一稅務居住地為香港
  Tax resident of Macau only 唯一稅務居住地為澳門

Country / Jurisdiction of tax residence 稅務居住國家 / 司法管轄區	Tax Identification Number (TIN) 稅務編號	If no TIN available, please enter Reason (A, B or C) 如未能提供稅務編號,請註明原因 (A, B 或 C)	If you selected Reason B, please explain why you are unable to obtain a TIN 倘若閣下選擇原因B, 請在下列說明為何閣下未能取得稅務編號
1			
2			
3			

Reason A – The country / jurisdiction where the owner is resident does not issue TINs to its residents  
原因A - 持有所屬之國家 / 司法管轄區沒有為其居民設立稅務編號Reason B – The owner is otherwise unable to obtain a TIN or equivalent number (Please explain why you are unable to obtain a TIN in the above table if you have selected this reason)  
原因B - 持有人未能獲得稅務編號或有同等功能的編號 (若選擇本原因,請於上表說明為何閣下未能取得稅務編號)Reason C – No TIN is required (Note: Only select this reason if the domestic law of the relevant jurisdiction does not require the collection of the TIN issued by such jurisdiction)  
原因C - 不需要稅務編號 (備註: 倘若閣下所屬之司法管轄區的相關本地法律並不需要收集稅務編號, 方可選擇這個原因)

Important Note 注意事項:

Should you declared the OECD (Organisation for Economic Co-operation and Development) designated Residence / Citizenship by Investment schemes country(ies) as your sole tax residence, please complete **Supplementary Form for Common Reporting Standard** (please refer to your agent / broker should you request for a copy). Please refer to OECD website for details of Residence / Citizenship by Investment schemes country(ies): <https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/residence-citizenship-by-investment/> 如閣下只聲明經濟合作與發展組織 (經合組織) 所指的RBI / CBI投資移民計劃之國家之稅務居民身份, 請填妥共同匯報標準附加表格 (請向閣下之營業員 / 經紀索取此表格) 。RBI / CBI投資移民計劃之國家詳情請參閱經合組織網頁<https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/residence-citizenship-by-investment/> The Company is required by the laws to conduct due diligence on the owner with respect to his / her / their tax residence, collect the required information and furnish a return to the governmental authorities. If there is any uncertainty about tax residency status, it is suggested that the owner shall disclose the information in the above table and consult also your own tax advisor.  
本公司是根據法律要求就持有人之稅務居住地進行盡職調查, 並收集所需資料及提供給政府機關。如持有人對稅務居住地有任何疑問, 請於上述表格內表述並徵詢你的稅務顧問。**PART B 乙部 Apply "AIA e-Advice" 申請「友邦電子通知書」**

Please mark a tick ✓ in the box to apply for this service. 閣下如欲申請此服務請於空格內劃上✓號。

 Apply for Internet Service "AIA e-Advice" to suppress physical copies of the selected correspondences and, subject to the # Terms and Conditions of "AIA e-Advice", via AIA Customer Corner, to view / download the softcopies for the above policy and any other policy number(s), if specified in Part A. Upon approval of the AIA e-Advice application, the current channel for receiving / delivering related correspondences under the terms of the policy contract or otherwise will be replaced immediately without prior notice by AIA e-Advice or other 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保單 (如有) 列出於甲部號碼之停止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, 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, 現於保單契約或其他契約內有關收取/發出相關通知書渠道的條款將即時由「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。請於甲部提供閣下的電郵地址。

**Declaration (applicable to e-advice only)**

I hereby confirm that I have read, understood and agreed to be bound by the #Terms and Conditions of AIA e-Advice.

# For details of the Terms and Conditions, please visit AIA Customer Corner ([www.aia.com.hk](http://www.aia.com.hk)).**聲明 (只適用於申請「友邦電子通知書」部份)**

本人確實已閱讀及明白「友邦電子通知書」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](http://www.aia.com.hk)之友邦客戶專頁參閱。**PERSONAL DATA COLLECTION AND USE**

I / We confirm that I / We have read and understood the AIA Everest Life Company Limited's (AIA Everest) Personal Information Collection Statement (the Statement).

I / We declare and agree that any personal data and other information relating to me / us or my / our policy(ies) or investments contained in this application or collected, obtained, compiled or held by AIA Everest by any means from time to time may be collected and utilized in accordance with the Statement. I / We acknowledge and consent to the transfer of my / our personal data to parties within or outside Hong Kong for the purposes as set out in the Statement. The updated version of the Statement which complies with the relevant rules and regulations is available for download from its website: <https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAE-PICS-English.pdf>, and is also available upon request.**個人資料收集及使用**

本人 / 我們確認本人 / 我們已閱讀及明白友邦雋峰人壽有限公司 (友邦雋峰) 個人資料收集聲明 (「該聲明」)。

本人 / 我們聲明及同意在本申請所載或友邦雋峰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 / 我們的保單或投資的其他資料, 可根據該聲明收集及使用。

本人 / 我們知悉及同意就該聲明所述目的轉讓本人 / 我們的個人資料至香港境內或境外各方。

該聲明符合相關守則及法例的最新版本可於以下網址下載:

<https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAE-PICS-Traditional-Chinese.pdf>, 及可向貴公司索取。**DIRECT PROMOTIONAL AND MARKETING MATERIALS**

In order to provide you with the latest news, offers and promotions and to conduct direct marketing activities, AIA Everest Life Company Limited (AIA Everest) may use your personal data according to AIA Everest's Personal Information Collection Statement (the "Statement") but AIA Everest cannot use your personal data for such purpose without your consent. Please tick "✓" in the box below if you do not agree AIA Everest to use your personal data for direct marketing.

[ ] I do not agree AIA Everest to use my personal data for direct marketing as set out in paragraph (4) of the Statement.

**宣傳及市場推廣資料**

為了向閣下提供最新消息、優惠和宣傳以及進行直接促銷活動, 友邦雋峰人壽有限公司 (友邦雋峰) 有意根據友邦雋峰個人資料收集聲明 (「該聲明」) 使用閣下的個人資料, 但友邦雋峰在未取得閣下的同意之前不能將閣下的個人資料用於該用途。倘若閣下不同意友邦雋峰使用閣下的個人資料進行直接促銷活動, 請在下方一欄劃上 "✓"。

[ ] 本人不同意友邦雋峰根據該聲明第(4)段所述使用本人的個人資料進行直接促銷活動。

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By signing below, I / we represent that I am / we are not a U.S. person for purposes of U.S. federal income tax and that I am / we are not acting for, or on behalf of, a U.S. person. I / We understand that the Company, believing this statement to be true, will rely on it and act on it. In the event this statement is incorrect / false, the Company reserves the right and shall be entitled to cancel the policy. Any policy issued may accordingly be considered void in which case the Company shall notify me / us and repay any premiums and levy (for Hong Kong policies) less reasonable charges and policy withdrawals / loans.

Note: A false statement or misrepresentation of tax status by a U.S. person could lead to penalties under U.S. law. If your tax status changes and you become a U.S. citizen or resident, you must notify us within 30 days. (This Clause is not applicable to U.S. citizens or residents, who must complete IRS Form W-9.)

於下方簽署作實，本人 / 我們聲明，就美國聯邦薪俸稅之有關事項而言，本人 / 我們並非美國人，及並不代表美國人行事。本人 / 我們明白貴公司相信此陳述是真實的，並以此為依據及代為行事。倘若此陳述是不正確 / 虛假的，貴公司保留權利，並有權取消保單。任何依據此陳述而繕發的保單可視作無效。在這情況下，貴公司將通知我 / 我們償還扣除合理的費用及保單提款 / 貸款後的保費與保費徵費（香港保單適用）。

備註：根據美國法律，任何美國人就其稅務狀況有虛假或失實陳述，將會受到刑罰。若閣下的稅務狀況有更改，並且成為美國公民或居民，請於三十日內通知本公司。（美國公民或居民必須填寫IRS之W-9表格，而以上之有關條款並不適用。）

I / We acknowledge and irrevocably agree that the information contained in this form and information regarding the Applicant(s) and any Reportable Account(s)\* may be provided to the tax authorities of the country / jurisdiction in which this account(s) is / are maintained and exchanged with tax authorities of another country / jurisdiction or countries / jurisdictions in which the Applicant(s) may be tax resident pursuant to intergovernmental agreements to exchange financial account information.

\*"Reportable Account" has the meanings ascribed to it under the "Common Standard on Reporting and Due Diligence for Financial Account Information" promulgated by the Organisation for Economic Cooperation and Development.

**For individual applicant(s)** - I / We certify that I am / we are the Applicant(s) (or am authorized to sign for the Applicant(s)) of all the account(s) to which this form relates.

**For corporate applicant(s)** - I certify that I am authorized to sign for the Applicant in respect of all the account(s) to which this form relates.

- I / We declare that all statements made in this declaration are, to the best of my / our knowledge and belief, correct and complete.
- I / We undertake to advise the Company within 30 days of any change in circumstances which affects the tax residency status of the party / parties identified as Applicant of this form or causes the information contained herein to become incorrect or incomplete, and to provide the Company with a suitably updated self-certification and Declaration within 30 days of such change in circumstances.
- I / We agree to indemnify the Company against any loss, claim and action in connection with any false, misleading or incomplete information of my / our nationality, residence and / or tax status.

本人 / 我們知悉並完全同意這表格內，所有資料及有關申請人之個人資料，和任何須申報帳戶\*，將有可能提供予管理該帳戶的國家 / 司法管轄區之稅務機關，及轉交予其他國家 / 司法管轄區之稅務機關或申請人所屬之國家 / 司法管轄區為根據跨政府協議所訂之財務帳戶資料交換要求的國家 / 司法管轄區。

\* "須申報帳戶" 之定義請參考經濟合作與發展組織頒佈的 "共同申報準則及財務帳戶資料之盡職調查"

**由個人作申請人** - 本人 / 我們在此聲明，本人 / 我們是本申請書相關之全部帳戶的申請人（或獲申請人授權簽署）。

**由公司作申請人** - 本人在此聲明，本人是獲申請人授權簽署本申請書相關的全部帳戶。

- 本人 / 我們聲明一切在這份聲明之條款是基於本人 / 我們的據知及所信，並且是正確及完整的。
- 本人 / 我們承諾，如有任何改動會影響認為申請人之一方 / 多方之稅務居民狀況內容，或導致其所載資料失實或不完整，本人 / 我們將於有關改動發生後30日內通知貴公司，並在該變動發生後30日內，向貴公司提交最新的自我證明書。
- 本人 / 我們同意賠償貴公司就本人 / 我們的國籍、居住及 / 或稅務狀況有關資料之虛報、誤導或不完整所導致的任何損失，索償及訴訟。

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

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

"AIA" herein refers to AIA Everest Life Company Limited (Incorporated in Hong Kong with limited liability).  
"AIA" 指友邦馬峰人壽有限公司（於香港註冊成立之有限公司）。