

REQUEST FOR INVESTMENT-LINKED / UNIVERSAL LIFE PLAN SERVICES

投資連繫式/萬用壽險計劃服務申請表

(Applicable to applications submitted by customers only) (只適用於由客戶遞交的申請)

Policy Number 保單號碼	Name of Insured 受保人姓名	Name of Owner 持有人姓名	19/3/5
			P1472060

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 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) 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 instruction(s) will be processed on the next dealing date after the instruction(s) is / are approved by the Company. Please note that there may be deferral in processing of the instruction(s) subject to any dealing restrictions as stated in the offering document(s) of the underlying fund(s).
 - 指示經本公司批准後,於下一個交易日進行。請注意,交易指示或會因相關連繫基金之銷售文件上列明的任何交易限制所限而被延遲處理。
- 7. For transfers / switches / 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。
- 9. If you switch your investment choices or change investment allocation, your risk may be increased or decreased. Please note that the risk level of the investment options you choose may not match the risk level you can tolerate. Moreover, you should read the offering documents of the underlying fund of each respective investment option (including Investment Options Brochure) before making any investment decision. You should also understand and agree to accept any associated risks with the switching or change of investment allocation instruction. 若閣下轉換投資選擇或更改投資分配,閣下所承受的投資風險可能因而增加或減少。請注意閣下所選的投資選擇之風險水平亦可能與閣下所能承受的風險水平不符。同時,閣下應在進行任何投資決定前閱讀有關投資選擇之相應連繫基金的銷售文件(包括「投資選擇」小冊子)。 閣下亦明白及同意接受任何與轉換投資選擇或更改投資分配相關的風險。

		Policy Number	ar 保留號碼			$\neg \neg$					
PART A: Investment-Linked Plat 甲部:投資連繫式計劃	n	1 Oiley Number	51 水平356 時								
1. Withdrawal of unit 提取單位											
For Treasure Master Plus 2 適用於「卓達智悅 2」 The minimum remaining balance of each Investment Option (Cash Distribution) after withdrawal of unit should be at least US\$2,000 or HK\$16,000 or RMB14,000. Please note that start up bonus will be fully clawed back if first partial withdrawal is made within the first five policy years.											
每項投資選擇(現金分派)於提取單位後之最低餘額為2,000美元或16,000港元或14,000人民幣。請注意,首五個保單年度內進行首次 部分提取,開戶獎賞將會被完全回扣。											
*Code No of uni 代號 單位數目	已登記使用「電子入賬服務」/「轉數快」之客戶,本公司會將款項轉入至指定之銀行戶口。										
	」 If e-BankIn / FPS is requested immediately, please complete Part D. 如要求即時登記「電子入賬服務」/「轉數快」,請填妥丁部。										
LLJ = LLJ	·」 If e-Bankin / FPS is not registered or if cheque payment is requested, please select: 」 如未有登記使用「電子入賬服務」/「轉數快」,或要求以支票支付,請選擇:										
	a) Cheque Payme	ent in 支票貨幣: 🔲 🕨	Hong Kong D	Oollar 港元	;						
LLJ = LLJ		☐ F	Policy Currer	ncy 保單貨	幣						
LL= LL											
L1 = L1											
LLJ = LLJ	』 If not indicated above, the che 如沒有註明指示,支票會以保	que will be issued in policy curre 單貨幣(ii)發出並寄往保單持有人的		t to the Owne	er's correspond	ence addre	SS.				
☐ Withdraw the above units to update 提取上述之單位用作繳付上述保單;	Withdraw the above units to update premiums and levy (for Hong Kong policies) for the above policy due on 提取上述之單位用作繳付上述保單之保費與保費徵費(香港保單適用),到期日為 MM月 DD日 YYYY年										
Repay the loan on policy no. 繳付信	只留贷款,仅留账框:		(US\$ / Hk	/ \$			\				
Pay the premium and / or levy (for H	ong Kong policies) of other polic	cies due on 繳付以下保單	_」` '號碼到期之 [,]	- □ 保費及/或	成保費徵費	 (香港保員	<i>'</i> _{星適用)}				
Transferring value to other policies	Premium due date	1			Currency /	Amoun	4				
Policy No. 保單號碼	保費到期日		Outstanding Levy 尚欠保費徵費								
Pay the initial deposit for New App Transferring value to other policies			-保單持有人	.的保單							
Application No. 新保單申請號碼		Applicant's Name 申請人姓名			Currency / 貨幣 /		t				
You are required to submit the signed Important Facts Statement – Policy Replacement (IFS-PR) (Applicable to Hong Kong Policy Only) or Customer Declaration for Policy Replacement (Applicable to Macau Policy Only) together with the Insurance Application form if you intend to pay the required premium of the new purchased policy by using the withdrawal policy value of this policy, as well as the policyowner of this policy and the new policy being purchased is the same.											
如您計劃提取此保單的保單價值作繳付新購買保單之所需保費,並且此保單的保單持有人與新購買保單的保單持有人相同,則您必須將已簽署的《重要資料聲明書一轉保》(只適用於 <u>香港</u> 保單)或《人壽保險客戶轉保聲明書》(只適用於 <u>澳門</u> 保單)並連同投保申請書一併提交。 Pay the policy adjustment 繳付更改保單之費用											
Transferring value to other policies must be within the same owner 繳付其他保單只限同一保單持有人的保單											
Policy N 保單號		Currency / Amount 貨幣 / 金額									
☐ Pay the AIA Vitality membership fee 繳付AIA Vitality健康程式會費											
AIA Vitality Membership No. AIA Vitality 健康程式會員編號		ip with insured K人之關係									
Withdrawal of units to update premiums and levy (for Hong Kong policies) should be submitted to the Company within the grace period i.e. 31 days from the premium due date. 提取單位用作繳交保費與保費徵費(香港保單適用),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 mi 需符合最低提款金額及提款後之最低戶	nimum required amount and a 口總結餘之要求。	ccount balance.									
Auto-Rebalancing will be automatically in Part 2.1. 基金提取之申請接受後,除非於第二項	•	·		inue auto-	-rebalancinç	j, please	specify				

2. Change of Investment Allocation and Switching 更改投資分配及調配								
Please confirm the statement in Part 2.4 if the risk level of your selected investment option(s) in P	art 2.1, 2.2 and / or 2.3 (Change Dollar C	Cost						
Averaging Allocation) mismatches with your current risk profile. "								
, 倘若在第二項的第一部分、第二部分及/或第三部分(更改「每月平均成本投資」基金投資分配)中揀選的投資選項的風險水平與閣下現時6								
風險程度不相符,請在第二項的第四部分之聲明中確認。								
2.1. Change Investment Allocation 更改投資分配 (Not applicable to U-Select / Cheerful Life / Treasure Master Plus 2 / AIA 2-in-1 Protection Linked Plan Series 不適用於「您想」/「自您人生」/「卓達智悅 2」/ AIA「兩全保」保障型投資相連壽險計劃系列)								
- for Regular premium and / or Regular top up	Investment							
- 基本保費及/或定期額外投資保費	^Code 件號 Allocation							
With / Continue Auto-Rebalancing	上 投資分配							
設立/繼續自動平衡投資	L	%د ـ						
Stop Auto-Rebalancing	L	%د _						
取消自動平衡投資	L= L	%د _						
	=	%د _						
Minimum allocation to a selected code is 10%	L = L	%د _						
所選擇的每項代號之分配不得少於10%	==	%د _						
Auto-Rebalancing will be automatically cancelled if investment allocation is changed, unless	=	%د _						
specified above.	==	%						
更改投資分配後,除非於上述列明,否則自動平衡投資(如有)將會自動取消。	=	1%						
	==							
	Total 共 = 100%	/0						
For Treasure Master Plus 2 適用於「卓達智悅 2」 The minimum remaining balance of each Investment Option (Cash Distribution) after each HK\$16,000 or RMB14,000. 每項投資選擇(現金分派)於調配後之最低餘額為2,000美元或16,000港元或14,000人民幣		or or						
Switch out 轉換出 Switch in 轉換入								
*Code No of units *Code 代號 單位數目 代號								
	_1=							
L= L	=							
	_1=							
	=							
	=							
	=							
L= LL								
	=							
LL	=							
LL= LL	=							
Unless specified in Part 2.1, the current investment allocation remains unchanged. 除非列明於第二項內的第一部分,現有的投資分配將維持不變。 Auto-Rebalancing will be automatically cancelled once request for switching or allocation is accepted. To continue Auto-Rebalancing, please specify in Part 2.1 above. 調配之申請接受後,除非於第二項第一部分列明,否則自動平衡投資(如有)將會自動取消。								

Policy Number 保單號碼

	Policy Number 保单號碼						
2.3. Dollar Cost Averaging Option 平均成本選項 (For Treasure Master / Treasure Master Select only 只適用於卓達之	Z選 / 卓達智富)						
Reduce Dollar Cost Averaging Monthly Contribution to	Change Dollar Cost Averaging (DCA) Allocation						
設立 / 更改「每月平均成本投資」至	更改「每月平均成本投資」基金投資分配						
US\$美元金額	*Code Investment Allocation						
The minimum DCA Monthly Contribution is US\$1,000.	代號 投資分配						
最低「每月平均成本投資」為1,000美元。	L1= L1%						
Cancel Dollar Cost Averaging Monthly Contribution	L= L						
取消「每月平均成本投資」	L1= L1%						
	L						
	L= L						
Note: For set up / increase Dollar Cost Averaging Monthly Contribution, please contact	L1 = L1%						
your Financial Planner to submit top-up premium request together with Important Facts							
Statement and Applicant's Declarations Form, Financial Needs Analysis Form and Risk	=						
Profile Questionnaire. Further document may be required pursuant to the Anti-Money Laundering and Counter-Terrorist Financing (Financial Institutions) Ordinance or other	L1 = L1%						
regulatory requirement.	=						
註:如設立或增加「每月平均成本投資」,請聯絡您的財務策劃顧問以申請額外投資保費並 連同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一同遞交。							
因應「打擊洗錢及恐怖分子資金籌集(金融機構)條例」或其他監管條例所要求下,您亦有可能需要遞交其他文件。	Minimum allocation to a selected code is 10% 所選擇的每項代號之分配不得少於10%						
2.4. Declaration for Change of Allocation and Switching 投	│ 資分配及調配之聲明						
mismatch as a result of your request(s) under Part 2.1, 2.2 and / or 2.3 (Change Dollar Cost Average Allocation) above and it is your intention and desire to proceed with your request(s), "please acknowledge that you have read and confirmed the below declaration by ticking the box."							
儘管根據本人於「風險承擔能力問卷」所披露的投資風險概況,本人於上述第二項內的第一部,第二部分及/或第三部分揀選的相關投資 選擇可能並不適合本人,但本人確認打算及意欲執行有關申請。							
3. Reduce Regular Top-Up Premium Amount 減小定期額外投資保費金額 (Not applicable to U-Select / Cheerful Life / Treasure Master Plus 2 / AIA 2-in-1 Protection Linked Plan Series 不適用於「您想」/「自您人生」/「卓達智悅 2」/AIA「兩全保」保障型投資相連壽除計劃系列)							
The following request is only for reducing the amount of Regular Top-up premium.							
下列更改只適用於減少定期額外投資保費金額。 For increasing / adding Regular Top-Up Premium, please contact your Financial Planner to submit Important Facts Statement and Applicant's Declarations Form, Financial Needs Analysis Form and Risk Profile Questionnaire. Further document may be required pursuant to the Anti-Money Laundering and Counter-Terrorist Financing (Financial Institutions) Ordinance or other regulatory requirement. 如增加或新增定期額外投資保費金額,聯絡您的財務策劃顧問以遞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「打擊洗錢及恐怖分子資金籌集(金融機構)條例」或 其他監管條例所要求下,您亦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 reduced regular top-up pre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已減額的額外投資保費金額;此保費金額							
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	,						
Semi-annual Regular Top-Up Premium 每半年定期額外投資保費US\$ 美元金額 (Minimum =US\$255 最少	費為						
□ Annual Regular Top-Up Premium 每年定期額外投資保費為 US\$ 美元金額 □ (Minimum = US\$500 最少	,						
Applicable to Non-Planned Premium Investment-Linked Plan only: Regular top-up premium must be paid monthly via autopay regardle Please specify the reduced monthly regular top-up premium amoun 只適用於投資連繫式壽險之非定存保費: 定期額外投資保費金額只接受月供形式並經由每月自動轉賬付款(不請列明已減額的每月定期額外投資保費金額:	ess of the mode of payment of your basic plan. nt below:						
Monthly Regular Top-Up Premium 每月定期額外投資保費為US\$美元金額							
(Minimum = US\$100 最少為100美元)							
For Hong Kong policies, the amount paid in by you will first be used to s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							

4. Other instructions 其他指示					
PART B: Universal Life Plan / Fleximoney 乙部:萬用壽險計劃 / 靈活銭戶口					
1. Withdrawal of Account Value / Fleximoney 提取戶口金額 / 靈活錢戶口 US\$美元金額					
For e-Bankin / FPS customers, the payment will be transferred to the designated bank account. 已登記使用「電子入賬服務」/ 「轉數快」之客戶,本公司會將款項轉入至指定之銀行戶口。					
If e-BankIn / FPS is requested immediately, please complete Part D. 如要求即時登記「電子入賬服務」/「轉數快」,請填妥丁部。					
If e-Bankin / FPS is not registered or if cheque payment is requested, please select:					
如未有登記使用「電子入賬服務」/「轉數快」,或要求以支票支付,請選擇:					
a) Cheque Payment in 支票貨幣: U Hong Kong Dollar 港元					
Policy Currency 保單貨幣 If not indicated above, the cheque will be issued in policy currency (ii) and sent to the Owner's correspondence address.					
如沒有註明指示,支票會以保單貨幣(ii)發出並寄往保單持有人的通訊地址。					
2. Pay Fleximoney 繳付靈活錢戶口 US\$美元金額					
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. 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。					
PART C: Internet Service 丙部:網上服務					
☐ AIA e-Advice 「友邦電子通知書」					
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					
below, subject to the Terms and Conditions of "AIA e-Advice". 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下列保單(如有)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					
知書指示,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,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。					
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:					

Policy Number 保單號碼

PART D: Immediate e-Bankin / FPS registration 丁部:即時登記「電子入賬服務」/「轉數快」	
Owner's Mobile Number (For Receiving SMS) 持有人手提電話號碼 (作接收短訊之用)	
We will update the telephone number to the above policy(ies) according	IS to be sent out upon the completion of the FPS / e-BankIn registration. ngly if it is different from the Company record. 「轉數快 / 電子入賬服務」登記當日發送有關短訊。如此號碼跟公司紀錄
持有人手提電話號碼: Country Code 國際電話區號 手機器	
Section 1 : Information for FPS Registration 第一部分:「轉 (Please select transferring policy benefits paid to <u>either FPS OR e-BankIn</u>) (請選擇 <u>「轉數快」或「電子入賬服務」</u> 其中一項以轉入以上保單所支付之保單利	
☐ FPS* 轉數快* Account currency 戶口貨幣: ☐ HKD ?	世元 □ RMB 人民幣^
	appropriate box and provide relevant information. <u>More than one selection</u> will be at the policy owner. 請以剔號選擇下列 其中一種 「識別代號」#及提供以下相關資料。 等有人。
FPS Identifier 「轉數快」識別號碼:	(
services from time to time provided by Hong Kong Interbank Clearing Limited, toge 「快速支付系統服務(轉數快)」指閣下不時向本人提供的服務,以讓本人使用由香港釗	限行同業結算有限公司及其繼承人及受讓人不時提供的快速支付系統及相關系統及服務。 ion of an account in the HKICL Addressing Service, including your mobile phone number, 您的手機號碼,電郵地址或「轉數快」識別號碼。 Policy in RMB policy currency.
(Please select transferring policy benefits paid to <u>either FPS OR e-BankIn</u>) (請選擇 <u>「轉數快」或「電子入賬服務」</u> 其中一項以轉入以上保單所支付之保單利	
e-Bankin 電子入賬服務	
Please provide bank account information below and submit together w	vith any of the following documents:
	assbook / bank correspondence / bank statement (including e-statement) / umber. 任何列有戶口持有人及銀行賬戶號碼最近期(必須在最近三個月內
Bank Name and Branch in Hong Kong 香港銀行及分行之名稱	Bank No. Branch No. My Account No. 銀行編號 分行編號 本人之賬戶號碼
Name as recorded on Bank Passbook / Correspondence / Statement / 銀行存摺 / 信件 / 月結單 / 銀行卡上所記錄之戶口持有人姓名(必須與上	
Important Notes 重要事項	
1. Only accept HKD Account opened in Hong Kong. 只接受在香港開立	· 之港元戶口。
2. Joint account is not accepted. 不接受聯名戶口。 3. The above account must be under the name of the Policy Owner. It	· 沭丘口必須為保留结右人结右。
 The above account must be under the name of the Policy Owner. 上 Please ensure the bank account holder name is the same as the policy factorial in t	licyowner name, otherwise the payment will be rejected by banks.
Declaration & Authorization 聲明及授權	
	sed to be bound by the terms and conditions as set out on AIA Cornorate

Policy Number 保單號碼

及條件,並同意受此約束。

Website (www.aia.com.hk). 藉使用「轉數快/電子入賬服務」,本人/我們確認本人/我們已經閱讀AIA公司網頁內(www.aia.com.hk)列明之條款

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