



**PREMIUM OFFSET OPTION QUOTATION FORM 扣除保費選擇評估申請表**

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 / 經紀號碼 Area / Agency / Broker Code 區域 / 營業員 / 經紀組別編號	Agent / Broker Tel. No 營業員 / 經紀聯絡電話
TR Membership Number (for Brokers only) 營業代表會員號碼 (僅供經紀使用)	<input type="checkbox"/> IA <input type="text"/>	<input type="checkbox"/> ANG <input type="text"/>



O2022044

I, Owner/Assignee/Trustee of the above Policy, hereby request for a quotation of the Premium Offset Option selected below (please mark X). I understand that this quotation is made based on the current policy values (if any), projected future dividends/cash endowments and interest rate. I also understand that the result of this quotation is not guaranteed and levy (for Hong Kong policies) are not included in the quotation.

本人為上述保單的持有人/受讓人/信託人，現申請貴公司提供下列選項（請劃上X號）之「扣除保費選擇」的評估。本人明白該評估將以現時保單的既有價值(如有)、預期往後將會派發的紅利/可支取現金及積存利率作評估基礎。本人亦明白此評估結果並非保證及不包括保費徵費（香港保單適用）。

Display Language 顯示語言：

(If not selected, display language in the quotation will be defaulted as policy language. 如未有選擇，評估上顯示之語言將預設為保單語言。)

Chinese 中文

English 英文

Option 1 選項 1:

If I now continue paying premium, please project the Commencement Date of the Premium Offset Option with the condition that the premiums shall be paid throughout the policy terms. Premiums shall cover:

若本人現繼續繳交保費，請推算「扣除保費選擇」可繳付保單全期保費之執行日期。保費將包括：

Basic plan and any rider(s) 基本計劃及任何附加契約

\*Basic plan only \*基本計劃

Option 2 選項 2:

If I now continue paying premium, please project the Commencement Date of the Premium Offset Option with the condition that the premiums shall be offset until the Policy Anniversary prior to the Insured's age \_\_\_\_\_. Premiums shall cover: 若本人現繼續繳交保費，請推算「扣除保費選擇」可繳付保單保費至受保人滿\_\_\_\_歲前的保單週年日之執行日期。保費將包括：

Basic plan and any rider(s) 基本計劃及任何附加契約

\*Basic plan only \*基本計劃

Option 3 選項 3:

If I now stop paying premium, please project the Premium Due Date that I need to pay the premiums on my own again after using up all current policy values and projected future dividends/cash endowments of the policy. Premiums shall cover: 若本人現停止繳交保費，並申請執行「扣除保費選擇」直至現時之保單價值及往後預期派發之紅利/可支取現金不足以繳付保費，請推算本人約於何時再需自行繳付保費。保費將包括：

Basic plan and any rider(s) 基本計劃及任何附加契約

\*Basic plan only \*基本計劃

\* Please submit Request For Change Form (OPPOSF04) to delete rider(s) when executing Premium Offset Option for Basic Plan only. While for exercising Premium Offset Option on the basic plan and continue to pay premium for the rider(s), please state in the 'Others' column of the Request For Change Form **“Apply PO Option on basic plan. I will continue to pay the premium of the rider(s).”**

\* 當只就基本計劃執行「扣除保費選擇」，請同時遞交更改保單申請表(OPPOSF04)取消所有附加契約。如欲行使「扣除保費選擇」於基本計劃上，而繼續支付保單內之附加契約的保費，請於「更改保單申請表」之「其他」一欄內填寫「基本計劃申請行使「扣除保費選擇」，本人將會繼續支付附加契約之保費。」。

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**DECLARATION 聲明**

I/We understand that at a certain point in time, I/We could have the option for all future premiums due and levy (for Hong Kong policies) to be paid from my/our accumulated dividends/cash endowments and interest as long as the relevant accumulated balance of dividends and/or cash endowments are sufficient to pay for the premiums due and levy (for Hong Kong policies).

本人/我們明白於某段時間，只要有關之積存紅利及/或可支取現金足夠繳付到期保費與保費徵費（香港保單適用），本人/我們可以選擇以積存紅利/可支取現金及利息用作繳付未來之保費與保費徵費（香港保單適用）。

I/We understand that any withdrawals of dividends/cash endowments or interest on dividends/cash endowments, or any future change in dividend scales, interest rates and/or plan coverage, will affect the effectiveness of the Premium Offset Option.

本人/我們明白提取任何紅利/可支取現金或紅利/可支取現金之利息，或將來更改紅利率、利率及/或保障範圍，均會影響「扣除保費選擇」之執行。

I/We understand that I/We have to separately remit in cash so as to continue the policy if the accumulated dividend and/or cash endowment is used up before the maturity of the policy.

本人/我們明白在保單期滿前，如積存紅利及/或可支取現金不足夠繳付到期保費與保費徵費（香港保單適用），本人/我們需另給付現金以確保保單繼續生效。

I/We also understand that the projected dividend values and the interest rate shown in the Illustration Document at the point of sale and/or delivery of the policy contract to me/us, or at the time the above quotation is made are subject to changes and are not guaranteed.

本人/我們亦明白於銷售及/或遞送保單契約時，或於上述評估時，顯示於舉例文件內之預期紅利價值及利率均並不是保證的，公司可以更改。

**PERSONAL DATA COLLECTION AND USE**

I / We confirm that I / we have read and understood the AIA Personal Information Collection Statement ("AIA PIC").

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 the Company by any means from time to time may be collected and utilized in accordance with the AIA PIC. I / We acknowledge and consent to the transfer of my / our personal data outside of Hong Kong (for policies issued in Hong Kong) or Macau (for policies issued in Macau), as the case may be, for the purposes and to the types of transferee as set out in the AIA PIC.

The updated version of AIA PIC is available for download from its website: [www.aia.com.hk](http://www.aia.com.hk), and is made 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況轉讓本人/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](http://www.aia.com.hk)，及可向貴公司索取。

\_\_\_\_\_  
Signature of Owner/Trustee  
持有人/信託人簽名  
(if other than insured 倘非受保人)

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