REQUEST FOR INVESTMENT- LINKED ASSURANCE SCHEME ("ILAS") SERVICES (For Cheerful Life / U-Select / AIA 2-in-1 Protection Linked Plan Series ("2-in-1") only)

投資相連壽險計劃服務申請表（只適用於「自悠人生」/「您想」/ AIA「兩全保」保障型投資相連壽險計劃系列（"兩全保"））

(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	P1482106

IMPORTANT NOTES 注意事項：

1. Please submit the Lump Sum Amount together with this form to Cashier during the Company's service hours (Monday to Friday 8:45a.m.-5:15p.m.except public holiday)
   請將整付投資金額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 Basic Premium Investment Allocation / Annual Regular Investment Allocation is / are changed, please submit 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)
   如需更改基本保費投資分配 / 年度定期投資分配。請將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. We will process your request upon this form is received and accepted by AIA, the receipt of this form by AIA Financial Planner or your broker does not constitute receipt by the Company.
   我們收妥及接納此表格後將處理您的申請，友邦財務策劃顧問或您的經紀收到此申請表並不代表本公司亦已收到。
4. Once the form is submitted to the Company, whether through our AIA Financial Planner or your broker or otherwise, the instruction provided on the form cannot be withdrawn, any subsequent change of the instructions will be treated as a new request, which will be processed after the former request is effected by the Company.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，不論是經由友邦財務策劃顧問、您的經紀，或由其他途徑遞交，表格上的任何指示將不能取消。任何更改將會當作新申請，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. To avoid any doubt, any investment option unit(s) which is under processed 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 / 調配指示。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 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 be performed when 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。

1. ☐ Withdrawal of unit 提取單位

Please note that start up bonus will be fully clawed back (if applicable) if first partial withdrawal is made within the first five policy years.
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（如適用）。

For "2-in-1" 適用於"兩全保"

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.
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。

*Code 代號	No of units 單位數目

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：

Cheque Payment in 支票貨幣：☐ Hong Kong Dollar 港元

☐ Policy Currency 保單貨幣

The cheque will be sent to the Owner's correspondence address. If the payment currency is not indicated above, the cheque will be issued in policy currency.
支票會寄往保單持有人的通訊地址。如沒有註明支票貨幣，支票將會以保單貨幣發出。

☐ 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. 繳付保單貸款，保單號碼：_____ (US$ / HK$ _____)

☐ Pay the premium and / or levy (for Hong Kong policies) of other policies due on 繳付以下保單號碼到期之保費及 / 或保費徵費（香港保單適用））

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 No. 保單號碼	Premium due date 保費到期日	Outstanding Levy 尚欠保費徵費	Currency / Amount 貨幣 / 金額
		☐	
		☐	

☐ Pay the initial deposit for New Application 繳付新保單作首期之按金

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

Application No. 新保單申請號碼	Applicant's Name 申請人姓名	Currency / Amount 貨幣 / 金額

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—轉保》（只適用於香港保單）或《人壽保險客戶轉保聲明書》（只適用於澳門保單）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 No. 保單號碼	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	Relationship with insured 與受保人之關係	Currency / Amount 貨幣 / 金額

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 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。

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 the followings:
如要求即時登記「電子入賬服務」/「轉數快」，請填妥以下資料：

Immediate e-Bankin / FPS Registration
即時登記「電子入賬服務」/「轉數快」

PART A: Owner's Mobile Number (For Receiving SMS)
甲部：持有人手提電話號碼 （作接收短訊之用）

You MUST provide your mobile number for receiving a SMS notification to be sent out upon the completion of the Faster Payment System (FPS) / e-BankIn Service registration. We will update the telephone number to the above policy(ies) accordingly if it is different from the record of AIA. 閣下必須提供您的手提電話號碼作接收通知短訊之用，我們將於完成「快速支付系統(轉數快) / 電子入賬服務」登記當日發送有關短訊。如此號碼跟AIA紀錄不同，我們會更新有關電話號碼至所有以上保單。

Owner's Mobile Number 持有人手提電話號碼： ( ) _____
Country Code 國際電話區號 | Telephone No 手機號碼

PART B 乙部
Section 1: Information for FPS Service Registration 第一部分：「轉數快服務」登記資料

(Please select **either FPS Service OR e-BankIn Service** for transferring policy benefits payment)
(請選擇**「轉數快服務」或「電子入賬服務」**其中一項以轉入以上保單所支付之保單利益)

☐ **FPS Service* 轉數快服務*** **Account currency 戶口貨幣：** ☐ **HKD 港元** ☐ **RMB 人民幣^**

Please select **either ONE** of the below "Proxy ID" # below by putting a tick on appropriate box and provide relevant information. **More than one selection** will be treated as invalid application. Your FPS account must also be registered under 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。若選擇**多過一個選項**將被視為申請**無效**。「轉數快」的用戶註冊名稱必須同樣為保單持有人。

☐ Email 電郵地址：

☐ FPS Identifier 「轉數快」識別號碼：

☐ Mobile Number 手機號碼：
( ) _____
Country Code 國際電話區號 | Telephone No 手機號碼

* **"FPS Service"** means the services provided by AIA to me from time to time to facilitate payments and funds transfer using the Faster Payment System and related systems and services from time to time provided by Hong Kong Interbank Clearing Limited (HKICL), together with its successors and assigns.
「**轉數快服務**」指AIA不時向本人提供的支付服務，以讓本人使用由香港銀行同業結算有限公司（結算公司）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。

\# **"Proxy ID"** means an identifier which may be accepted by HKICL for the registration of an account in the HKICL Addressing Service, including my mobile phone number, email address or FPS Identifier.
「**識別代號**」指結算公司接納用作結算公司賬戶綁定服務賬戶登記的識別資料，包括本人的手機號碼，電郵地址或「轉數快」識別號碼。

^ FPS Service in RMB payment(s) is only available to Policy with RMB as policy currency.
以人民幣透過轉數快服務支付只適用於保單貨幣為人民幣的保單。

Section 2: Information for e-BankIn Registration 第二部分：「電子入賬服務」登記資料

(Please select **either FPS Service OR e-BankIn Service** for transferring policy benefits payment)
(請選擇**「轉數快服務」或「電子入賬服務」**其中一項以轉入以上保單所支付之保單利益)

☐ **e-BankIn Service 電子入賬服務** **Account currency 戶口貨幣：** ☐ **HKD 港元** ☐ **USD 美元**[5]

Please provide bank account information below and submit together with any of the following documents:
請提供以下銀行戶口資料及提交下列任何之文件：
Copy of any recent (Must be dated within the last three months) bank passbook / bank correspondence / bank statement (including e-statement) / valid bank card showing the account holder's name and account number. 最近的銀行存摺 / 信件 / 月結單（包括電子結單）/ 有效銀行卡副本（必須在最近三個月內發出），並須列有戶口持有人姓名及銀行賬戶號碼。

Bank Name and Branch in Hong Kong 香港銀行及分行之名稱[1]	Bank No. 銀行編號	Branch No. 分行編號	My Account No. 本人之賬戶號碼

Name as recorded on Bank Passbook / Correspondence / Statement / Bank card (must be same as the Owner of the above Policy)
銀行存摺 / 信件 / 月結單 / 銀行卡上所記錄之戶口持有人姓名（必須與上述保單持有人相同）[2, 3, 4]

Important Notes 重要事項

1. Only accept (a) HK dollar Account opened with bank in Hong Kong or (b) US dollar Account opened in Hong Kong and maintained by Citibank (Hong Kong) Limited, Citibank, N.A. or Bank of China (Hong Kong) Limited. 只接受(a)於香港銀行開立之港元銀行戶口或(b) 於香港開立並由花旗銀行(香港)有限公司、花旗銀行或中國銀行(香港)有限公司提供之美元戶口。
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. 上述戶口必須為保單持有人持有。
4. Please ensure the bank account holder name is the same as the policyowner name, otherwise the payment will be rejected by banks. 請確保銀行戶口持有人姓名與保單持有人姓名一致，否則入賬指示將不被銀行接納。
5. E-BankIn Service in US dollar payment(s) is only available to Policy with US dollar as policy currency. 以美元透過電子入賬服務支付只適用於保單貨幣為美元的保單。

Declaration & Authorization 聲明及授權

(1) By using the FPS / e-BankIn service, I / we confirm I / we have read, understood and agreed to be bound by the terms and conditions as set out on this form.
藉使用「轉數快 / 電子入賬服務」，本人 / 我們確認本人 / 我們已經閱讀及明白本表格列明之條款及細則，並同意受此約束。

(2) I / We declare that the information contained herein and provided to AIA are in all respects true, correct and complete to the best of my / our knowledge and belief.
本人 / 我們現聲明，據本人 / 我們所知及所信，本表格所載之將提供予友邦的資料，在所有方面均屬真實、準確及完整。

2 ☐ **Reduce Regular Investment Premium Amount 減少定期投資保費金額**
請選擇以下其中一項並列明新的定期投資保費金額；此保費金額是根據閣下保單的繳費形式而定：

- ☐ Monthly Regular Investment Premium 每月定期投資保費為
  US$ 美元金額
- ☐ Quarterly Regular Investment Premium 每季定期投資保費為
  US$ 美元金額
- ☐ Semi-annual Regular Investment Premium 每半年定期投資保費為
  US$ 美元金額
- ☐ Annual Regular Investment Premium 每年定期投資保費為
  US$ 美元金額

The minimum amount of annualized Reduce Investment is US$100 or HK$800.
年度化定期投資的最低金額為100美元或800港元。

For U-Select 適用於「您想」投資連繫壽險計劃

The minimum amount of annualized Reduce Investment for each Investment Option (Cash Distribution) is US$24,000 or HK$192,000.
每項投資選擇（現金分派）之最低年度化定期投資金額為24,000美元或192,000港元。

If you want to add / increase the regular investment premium amount, please contact your Financial Planner to submit important Facts Statement the Applicant's Declaration Form, Financial Needs Analysis Form and Risk Profile Questionaire. Further document may be required pursuant to the Anti-Money Laundering and Counter-Terrorist Financing (Financial Institutions) Ordinance or other regulatory requirement.
如閣下欲增加或提升定期投資保費金額，請聯絡財務策劃顧問並遞交重要資料聲明書、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，而有可能需要遞交其他文件。

3. Change of Investment Allocation and Switching 更改投資分配及調配

Please confirm the statement in Part 3.4 if the risk level of your selected investment option(s) in part 3.1, 3.2 and/or 3.3 mismatches with your current risk profile.
倘若在第三項的第一部分、第二部分及 / 或第三部分中揀選的投資選項的風險水平與閣下現時的風險程度不相符，請在第三項的第四部分之聲明中確認。

3.1. ☐ Change of Basic Premium Allocation 更改基本保費分配

Minimum allocation to a selected code is 10%
所選擇的每項代號之分配不得少於10%

For U-Select / AIA 2-in-1 Protection Linked Plan (Regular Premium)
適用於「您想」投資連繫壽險計劃 / AIA「兩全保」保障型投資相連壽險計劃（定期保費）

Investment Options (Cash Distribution) are not available for basic premium allocation.
投資選擇（現金分派）不適用於基本保費分配。

*Code 代號		Investment Option Allocation 投資選擇分配
	=	%
	=	%
	=	%
	=	%
	=	%
	=	%
	=	%
	=	%
	=	%
	=	%
Total 共	**=**	**100%**

3.2. ☐ Change of Regular Investment Allocation 更改定期投資分配

Minimum allocation to a selected code is 10%
所選擇的每項代號之分配不得少於10%

For U-Select 適用於「您想」投資連繫壽險計劃

The minimum amount of annualized Regular Investment for each Investment Option (Cash Distribution) is US$24,000 or HK$192,000.
每項投資選擇(現金分派)之最低年度化定期投資金額為24,000美元或192,000港元。

*Code 代號		Investment Option Allocation 投資選擇分配
	=	%
	=	%
	=	%
	=	%
	=	%
	=	%
	=	%
	=	%
	=	%
	=	%
Total 共	**=**	**100%**

3.3. ☐ **Switching 調配**

For U-Select / "2-in-1" 適用於「您想」投資連繫壽險計劃 / "兩全保"

The minimum investment amount for each Investment Option (Cash Distribution) through switch-in is RMB14,000 (applicable to "2-in-1" only) or US$2,000 or HK$16,000.
每項投資選擇（現金分派）之最低轉換入金額為14,000人民幣（只適用於"兩全保"）或2,000美元或16,000港元。

For "2-in-1" 適用於 "兩全保"

The minimum remaining balance of each Investment Option (Cash Distribution) after each switch-out should be at least US$2,000 or 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。

Switch out 調配出		**Switch in 調配入**	
*Code 代號	No of units 單位數目	*Code 代號	No of units 單位數目
	=		
	=		
	=		
	=		
	=		
	=		
	=		
	=		
	=		
	=		

Unless specified in Part 3.1 and / or 3.2, the current investment allocation remains unchanged.
除非列明於第三項內的第一部分，及 / 或第二部分，現有的投資分配將維持不變。

3.4. Declaration for Change of Allocation and Switching 投資分配及調配之聲明

The risk level of your selected investment option(s) to be switched / or to allocated in shall match with your current risk profile in AIA. If there is such mismatch as a result of your request(s) under Part 3.1, 3.2 and/or 3.3 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.
揀選轉入或投資分配至的投資選擇之風險水平應與閣下現時的風險程度相符。倘若上述第三項內的第一部分， 第二部分及/或第三部分項內的申請引致相關不符的情況，而閣下仍打算及意欲執行有關申請，請勾選方格以確認您已閱讀及同意下列聲明。

Declaration 聲明：

☐ Despite the fact that the risk level of my selected underlying investment choices as stated in Part 3.1, 3.2 and /or Part 3.3 above, may not suitable for me based on my risk profile as indicated in Risk Profile Questionnaire, I confirm that it is my intention and desire to proceed with my request(s).
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，本人於上述第三項內的第一部，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。

4. Reduce Face Amount 減少基本保額 (Applicable to U-Select only 只適用於「您想」)

Prior to any application to reduce the face amount, you should evaluate if the death benefit is sufficient to meet your needs after such reduction.
在申請降低基本保額時，您應檢視身故賠償在降低基本保額後是否足以應付您的個人需要。

4.1 Reduce Face Amount 減少基本保額

☐ Reduce Face Amount 減少基本保額	
From 由	To 至

4.2 Basic Premium Payable after Reduction of Face Amount (applicable to policies on or after the 8th policy year) 減少基本保額後的所選基本保費（適用於第8個保單年度或以上的保單）：

Starting from the 8th policy year, you may choose to pay a new preferred basic premium based on a face amount in an amount ranging from the reduced current face amount up to the face amount at inception. If you do not specify the preferred amount of basic premium, the basic premium will be defaulted to be based on the reduced current face amount. 從第8個保單年度起，閣下可從保單繕發時的基本保額而訂定的基本保費，至按已降低的現時基本保額而訂定的基本保費之間，選擇支付新的所選基本保費。如閣下未有指定希望支付的基本保費金額，基本保費則會自動按已降低的現時基本保額而訂定。

☐ Based on the reduced current face amount 按已降低的現時基本保額而訂定

☐ Based on the face amount of 按以下基本保額而訂定 $_____

(This value should be in between the face amount at inception and the reduced current face amount
此金額必須介乎已降低的現時基本保額及保單繕發時的基本保額之間)

5a. Reduce Sum Assured by Lowering Prescribed Percentage 調低特定百分比以降低保額

Applicable to "AIA 2-in-1 Protection Linked Plan (Single Premium)" and "AIA 2-in-1 Protection Linked Plan (Regular Premium)"only, starting from the third Policy Year and on or before the policy anniversary on or immediately following the Insured's 65th birthday
只適用於"AIA「兩全保」保障型投資相連壽險計劃（整付保費）"及"AIA「兩全保」保障型投資相連壽險計劃（定期保費）"，第三個保單年度起及於受保人年滿65歲生日或其後緊接著的保單週年日或此前適用

For "AIA 2-in-1 Protection Linked Plan (Single Premium) 適用於"AIA「兩全保」保障型投資相連壽險計劃（整付保費）"
Subject to the Minimum Sum Assured. Currently the minimum amount is USD9,000/HKD72,000/RMB63,000.
受限於最低保額。現時的最低金額為9,000美元 / 72,000港元 / 63,000元人民幣。

For "AIA 2-in-1 Protection Linked Plan (Regular Premium) 適用於"AIA「兩全保」保障型投資相連壽險計劃（定期保費）"
Subject to the Minimum Sum Assured. Currently the minimum amount is USD13,500 / HKD108,000/RMB94,500.
受限於最低保額。現時的最低金額為13,500美元 / 108,000港元 / 94,500元人民幣。

By lowering the prescribed percentage of your policy, your sum assured will be reduced accordingly. For "AIA 2-in-1 Protection Linked Plan (Single Premium)", new sum assured of policy will be determined by the prescribed percentage requested by you and single premium at policy issuance. For "AIA 2-in-1 Protection Linked Plan (Regular Premium)", new sum assured of policy will be determined by the prescribed percentage requested by you and total premium payable. In the event that the prescribed percentage in your request will result a non-integer sum assured, we have the right to round the sum assured to the nearest integer and such sum assured after rounding will be the new sum assured of your policy. Prior to any application to reduce the sum assured by lowering prescribed percentage, you should evaluate if the death benefit is sufficient to meet your needs after such reduction. In addition, once the Sum Assured is reduced, it cannot be increased. The new sum assured will be effective upon our approval of your request of lowering prescribed percentage. Such change will be recorded by an Endorsement, which will be sent to you later.
通過調低閣下保單的特定百分比，閣下的保額將相應降低。"AIA「兩全保」保障型投資相連壽險計劃（整付保費）"保單的新保額將由閣下要求的特定百分比和保單簽發時的整付保費決定。"AIA「兩全保」保障型投資相連壽險計劃（定期保費）"保單的新保額將由閣下要求的特定百分比和應繳保費總額決定。如果閣下要求的特定百分比將導致非整數保額，我們有權將保額四捨五入到最接近的整數，並且該四捨五入後的保額將成為閣下保單的新保額。在申請調低特定百分比以降低保額時，閣下應檢視身故賠償在降低保額後是否足以應付閣下的個人需要。此外，保額一經減少即無法將其增加。新的保額經我們批准閣下調低特定百分比的申請後便會生效。該更改會記錄於批註，並在未來發送給閣下。

Reduce Prescribed Percentage 調低特定百分比

(Please indicate the new prescribed percentage. Please note that the new prescribed percentage must be lower than the current prescribed percentage. 請註明新的特定百分比。請注意，新的特定百分比必須低於現時的特定百分比。)

For "AIA 2-in-1 Protection Linked Plan (Single Premium)
適用於"AIA「兩全保」保障型投資相連壽險計劃（整付保費）"
New Prescribed Percentage 新特定百分比

- ☐ 150%
- ☐ 200%
- ☐ 250%
- ☐ 300%
- ☐ 350%
- ☐ 400%
- ☐ 450%
- ☐ 500%
- ☐ 550%
- ☐ 600%
- ☐ 650%
- ☐ 700%

For "AIA 2-in-1 Protection Linked Plan (Regular Premium)
適用於"AIA「兩全保」保障型投資相連壽險計劃（定期保費）"
New Prescribed Percentage 新特定百分比

- ☐ 150%
- ☐ 200%
- ☐ 250%
- ☐ 300%
- ☐ 350%
- ☐ 400%

Note: You can choose to reduce Sum Assured by either (i) lowering Prescribed Percentage or (ii) lowering regular premium. If you wish to reduce the Sum Assured by lowering both Prescribed Percentage and Regular Premium, please submit a separate form for each request. If both requests are submitted in the same form, we will only process the request for lowering Prescribed Percentage.
注意：閣下可以透過(i)調低特定百分比或(ii)降低定期保費降低保額。若閣下希望申請調低特定百分比及調低定期保費降低保額，請為每項申請分別提交一份表格。若閣下在同一份表格中提交兩項申請，我們只會處理調低特定百分比的申請。

5b. Reduce Sum Assured by Lowering Regular Premium 調低定期保費以降低保額

Applicable to "AIA 2-in-1 Protection Linked Plan (Regular Premium)"only, starting from the third Policy Year and during the premium payment term
只適用於"AIA「兩全保」保障型投資相連壽險計劃（定期保費）"，第三個保單年度起及於保費繳付年期內適用

Subject to the Minimum Sum Assured and Minimum Regular Premium. Currently the minimum amount of Sum Assured is USD13,500 / HKD108,000 / RMB94,500.
Currently the minimum amount of Regular Premium is as follows:
(a) For monthly premium payment mode: USD75 / HKD600 / RMB525
(b) For quarterly premium payment mode: USD225 / HKD1,800 / RMB1,575
(c) For semi-annually premium payment mode: USD450/HKD3,600/RMB3,150
(d) For annually premium payment mode: USD900 / HKD7,200 / RMB6,300

受限於最低保額及定期保費。現時的最低保額金額為13,500美元 / 108,000港元 / 94,500元人民幣。
現時的定期保費最低金額如下：
(a) 月繳保費繳付模式：75美元 / 600港元 / 525 元人民幣
(b) 季繳保費繳付模式：225美元 / 1,800港元 / 1,575元人民幣
(c) 半年繳保費繳付模式：450美元 / 3,600 港元 / 3,150元人民幣
(d) 年繳保費繳付模式：900美元 / 7,200港元 / 6,300 元人民幣

By lowering the regular premium of your policy, your sum assured will be reduced accordingly. New sum assured of policy will be determined by the prescribed percentage requested by you and total premium payable. In the event that the regular premium in your request will result a non-integer sum assured, we have the right to round the sum assured to the nearest integer and such sum assured after rounding will be the new sum assured of your policy. Prior to any application to reduce the sum assured by lowering regular premium, you should evaluate if the death benefit is sufficient to meet your needs after such reduction. In addition, once the Sum Assured is reduced, it cannot be increased. The new sum assured will be effective on the next Premium Due Date upon our approval of your request of lowering regular premium. Such change will be recorded by an Endorsement, which will be sent to you later.
通過調低閣下保單的定期保費，閣下的保額將相應降低。"AIA「兩全保」保障型投資相連壽險計劃（定期保費）"保單的新保額將由閣下要求的特定百分比和應繳保費總額決定。如果閣下要求的定期保費將導致非整數保額，我們有權將保額四捨五入到最接近的整數，並且該四捨五入後的保額將成為閣下保單的新保額。在申請調低定期保費以降低保額時，閣下應檢視身故賠償在降低保額後是否足以應付閣下的個人需要。此外，保額一經減少即無法將其增加。新的保額經我們批准閣下調低定期保費申請後的下一個保費到期日便會生效。該更改會記錄於批註，並在未來發送給閣下。

Reduce Regular Premium調低定期保費

(Please indicate the new regular premium. Please note that the new regular premium must be an integer and it must be lower than the current regular premium.
請註明新的定期保費。請注意，新的定期保費必須為整數及低於現時的定期保費。)

Note: You can choose to reduce Sum Assured by either (i) lowering Prescribed Percentage or (ii) lowering regular premium. If you wish to reduce the Sum Assured by lowering both Prescribed Percentage and Regular Premium, please submit a separate form for each request. If both requests are submitted in the same form, we will only process the request for lowering Prescribed Percentage.
注意：閣下可以透過(i)調低特定百分比或(ii)降低定期保費降低保額。若閣下希望申請調低特定百分比及調低定期保費降低保額，請為每項申請分別提交一份表格。若閣下在同一份表格中提交兩項申請，我們只會處理調低特定百分比的申請。

☐ **Reduce Regular Premium 調低定期保費 Amount 金額** ☐ **HKD 港元** ☐ **USD 美元** ☐ **RMB 人民幣**

6. ☐ **Other instructions 其他指示**

☐ **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+ 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AIA+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：

DECLARATION 聲明

(i) I have read, understood and agreed to comply with the contract and principal brochure for the policy, including information relating to the underlying fund / investment (for investment-linked plans) and the applicable fees and charges. Besides, I have also read, understood and agreed to comply with the offering document(s) of the underlying fund(s) of respective investment option(s) (including any dealing restrictions) before making investment decision(s). I / We also understand and agree to accept any associated risk.
本人已詳閱、完全明白及同意遵守有關保單的契約及主要銷售刊物，包括與投資連繫式計劃相關之連繫基金 / 投資及適用的費用及收費。此外，本人已在進行投資決定前詳閱、明白及同意遵守有關投資選擇之相應連繫基金的銷售文件（包括任何交易限制）。本人亦明白及同意接受任何相關風險。

(ii) For investment-linked plans, I have evaluated the level of risk of the underlying fund / investment myself and have selected the investment options for the purposes of the policy based on my own judgement and personal needs.
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。本人依據本人的判斷和個人需要作出此保單之投資選擇。

(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 latest policy currency as shown on the Policy Information Page of the Policy or, if applicable, the appropriate subsequent endorsement. Accordingly, the provision of the option to receive any such benefits in a currency other than the latest policy currency (the "Opted Currency") is solely a service offered by the Company at its discretion. I understand and agree that should I opt for payment of any benefits payable under the Policy in the Opted Currency, I will bear the necessary exchange difference, such difference being determined by the Company on the basis of the Company's internal exchange rates as at the time of the relevant currency conversion.
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）所載之最近期保單貨幣為準。因此，提供選擇以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公司酌情所提供之服務。本人明白及同意如本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換差額，而該差額是有關貨幣兌換時依據貴公司內部貨幣兌換率而釐定。

(iv) 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 www.aia.com.hk.
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，請參閱www.aia.com.hk。

(v) If you choose any investment option which aims to distribute cash dividends on a regular basis, please note the associated risks. In particular, the corresponding underlying fund does not guarantee the distribution of cash dividends, the frequency of distribution, and the amount or rate of cash dividends. Also, the underlying fund may at its discretion pay cash dividend out of investment income, capital gains or capital while charging / paying all of its fees and expenses to / out of its capital (i.e. effectively pay cash dividend out of capital). Please refer to the Investment Options Brochure for the associated risks. For details of the cash dividend composition of the underlying fund, please visit http://www.aia.com.hk/.
如閣下選擇任何旨在定期分派股息的投資選擇，請注意相關風險。尤其，相應的連繫基金並不保證股息的分派，分派的頻率，及股息的金額或息率。此外，相關的連繫基金或可酌情從資本或總收益撥付股息並同時從其資本中收取 / 支付全部或部分的費用和支出（即實際上從資本中撥付股息）。請參閱投資選擇小冊子以了解相關風險。有關連繫基金股息組成的詳情，請瀏覽http://www.aia.com.hk/。

(Vi) If you have signed the last Risk-Profile-Questionnaire over 12 months or there are substantial change to the last Risk Profile Questionnaire, please seek assistance from your "licensed" financial planner / intermediaries to conduct RPQ for updating your risk profile. (Applicable to Fund switching / Fund allocation / Unscheduled Top Up / Regular Top Up)
若您在12個月之前簽署了風險承擔能力問卷，或就上一個風險承擔能力問卷中的內容或資料有重大變化，請聯繫你的"許可"財務規劃師 / 中介人協助以進行風險承擔能力問卷以便更新您的風險狀況。（適用於資金調配 / 基金分配 / 額外投資保費（不定期）/ 定期額外投資保費）

PERSONAL DATA COLLECTION AND USE

I / We confirm that I / we have read, understood and agreed to the Personal Information Collection Statement(s) of my / our policy issuer(s) and/or pension scheme provider(s), i.e. AIA International Limited (Hong Kong Branch), AIA International Limited (Macau Branch) and / or AIA Company Limited where applicable, (the "PICS") which is available for download: https://www.aia.com.hk/en/privacy-statement-main.

I / We declare and agree that any personal data and other information relating to me / us or my / our policy(ies), account(s) or investments contained in this application or collected, obtained, compiled or held by my / our policy issuer(s) and / or pension scheme provider(s) by any means from time to time may be collected and utilized in accordance with the PICS.

I / We acknowledge and consent to the transfer of my / our personal data to parties within or outside Hong Kong (for policy(ies) / pension scheme(s) issued in Hong Kong) or Macau (for policy(ies) / pension scheme(s) issued in Macau), as the case may be, for the purposes as set out in the PICS.

The latest version of the PICS which complies with the relevant rules and regulations is / are available for download from the above website and upon request.

個人資料收集及使用

我 / 我們確認我 / 我們已閱讀、明白及同意我 / 我們的保單繕發人及 / 或退休金計劃服務提供者（即友邦(國際)有限公司（香港分行）、友邦(國際)有限公司（澳門分行）及/或友邦保險有限公司（如適用））的個人資料收集聲明（「該聲明」），該聲明可在以下網址下載https://www.aia.com.hk/zh-hk/privacy-statement-main。

我 / 我們聲明及同意在本申請所載或我 / 我們的保單繕發人及 / 或退休金計劃服務提供者不時以任何方法收集、獲得、編製或持有的任何個人資料及關於我 / 我們的保單、帳戶或投資的其他資料，可根據該聲明收集及使用。

我 / 我們知悉及同意就該聲明所述目的轉移我 / 我們的個人資料至香港境外 / 境內（如保單 / 退休金計劃在香港繕發）或澳門境外 / 境內（如保單 / 退休金計劃在澳門繕發）（視乎情況而定）予該聲明所載的資料承讓人。

該聲明的符合相關守則及法規之最新版本可於以上網址下載及可供索取。

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 Notes:

1) Signature must correspond with the Company's existing record. Please refer to the copy of the application form attached to the Policy or to the signature specimen on any document subsequently recorded by the Company.
   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.
   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。

*** 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。**

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" shall refer to AIA International Limited (Incorporated in Bermuda with limited liability), AIA Company Limited (Incorporated in Hong Kong with limited liability), as the case may be, depending on the issuing company of the relevant insurance policies this form / request / correspondence is subject to.
"AIA"指友邦保險(國際)有限公司（於百慕達註冊成立之有限公司），友邦保險有限公司（於香港註冊成立之有限公司）（視情況而定），具體取決於本表格 / 要求相關保單的簽發公司。

Download our AIA+ mobile app to manage your policy!
下載AIA+手機應用程式以便輕鬆管理您的保單！