




**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	 P1482089
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**IMPORTANT NOTES 注意事項：**

- 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）
- 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）
- 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。
- 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whether through our AIA Financial Planner or your broker or otherwise, the instruction provided on the form cannot be withdrawn, any subsequent change of the instructions will be treated as a new request, which will be processed after the former request is effected by the Company.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。
- 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。
- 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。
- 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。
- 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。
- 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

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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
		<input type="checkbox"/>	
		<input type="checkbox"/>	

☐ 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 Macao 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。

**如要求即時登記「電子入賬服務」/「轉數快」，請填妥以下資料：**

**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 Questionnaire. 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

_____	=	_____ %
_____	=	_____ %
_____	=	_____ %
_____	=	_____ %
_____	=	_____ %
_____	=	_____ %
_____	=	_____ %
_____	=	_____ %
_____	=	_____ %
_____	=	_____ %
<b>Total 共</b>	<b>=</b>	<b>100%</b>

**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

_____	=	_____ %
_____	=	_____ %
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<b>Total 共</b>	<b>=</b>	<b>100%</b>





□

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。

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- 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。

- 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。

- 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.

- 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](http://www.aia.com.hk).

- 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/>。

- 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，請聯繫您的“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）

