



REQUEST FOR INVESTMENT- LINKED / UNIVERSAL LIFE PLAN SERVICES

投資連繫式/萬用壽險計劃服務申請表

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"/> PIBA <input type="checkbox"/> CIB <input type="checkbox"/> ANG	



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ADCFH5BHCH9G. 注意事項

- 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)
- 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)
- 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。
- 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。
- 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。
- 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 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/轉換/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 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。

D5FH5' 甲部 -bJ Ygha Ybh@b_YX'D'Ub' 投資連繫式計劃

% <input type="checkbox"/> K jA XfUk U'cZi bjh 提取單位		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 has not been registered, we will pay the cheque in: 如未有登記使用「電子入賬服務」/「轉數快」, 本公司會以支票支付, 貨幣選擇為:	
*Code 代號	No. of units 單位數目	*Code 代號	No. of units 單位數目
-----	= -----	-----	= -----
-----	= -----	-----	= -----
-----	= -----	-----	= -----
-----	= -----	-----	= -----
-----	= -----	-----	= -----
<input type="checkbox"/> 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 SSS'(MM月/DD日/YYYY年)			
<input type="checkbox"/> Repay the loan on policy no. 繳付保單貸款, 保單號碼: _____ (US\$/HK\$ _____)			
<input type="checkbox"/> 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)			
Dc'WmBc. 保單號碼	DfYa jI a 'Xi YXUhr 保費到期日	FYUjcbgl j'd'k jh 'ck bYr 與保單持有人之關係	Ci lgrUbxJb['@j m 尚欠保費徵費
<input type="checkbox"/> Pay the initial deposit for New Application 繳付新保單作首期之按金			
Application No. 新保單申請號碼	Applicant's name 申請人姓名	Currency / Amount 貨幣 / 金額	
<input type="checkbox"/> Pay the policy adjustment 繳付更改保單之費用			
Policy No. 保單號碼	Relationship with owner 與保單持有人之關係	Currency / Amount 貨幣 / 金額	
<input type="checkbox"/> 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. 提取單位用作繳付保費與保費徵費(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. 需符合最低提取金額及提取後之最低戶口總結餘之要求。 Auto-Rebalancing will be automatically cancelled once request for fund withdrawal is accepted. To continue auto-rebalancing, please specify in Part (4). 基金提取之申請接受後, 除非於第四項列明, 否則自動平衡投資(如有)將會自動取消。

OPPOSF17.0619

PART B 乙部 Universal Life Plan 萬用壽險計劃 / Fleximoney 靈活錢戶口

US\$ 美元金額

如未有登記使用”電子入賬服務，本公司會以支票支付，貨幣選擇為：

☐ **Policy Currency** 保單貨幣 ☐ The above-named agent / broker 遞送給以上營業員/經紀

如沒有註明指示，支票會寄往保單持有人的通訊地址

US\$ 美元金額

Minimum Contribution = US\$500 供款最少為美元500

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。

US\$美元金額

最低「每月平均成本投資」為1,000美元。

☐ Cancel Dollar Cost Averaging Monthly Contribution
取消「每月平均成本投資」

Note: For addition of investment into Dollar Cost Averaging Option (DCA) , please contribute premium to "Unscheduled Top up Premium" in Part A (2) and allocated to the designated Money Market Investment option for DCA as indicated in the Investment Option brochure.

如需增加投資作為平均成本選項(DCA)之用，請填寫甲部(2)繳付額外投資保費(不定期)並分配至投資選擇小冊子內列名為適用於 DCA「指定貨幣基金投資選擇」。

○ Change Dollar Cost Averaging (DCA) Allocation
更改「每月平均成本投資」基金投資分配

* Code 代號	Investment Allocation 投資分配
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- - - - -	=	- - - - -	%
- - - - -	=	- - - - -	%
- - - - -	=	- - - - -	%
- - - - -	=	- - - - -	%
- - - - -	=	- - - - -	%
- - - - -	=	- - - - -	%
- - - - -	=	- - - - -	%
- - - - -	=	- - - - -	%
- - - - -	=	- - - - -	%
- - - - -	=	- - - - -	%
Total 共	=	100	%

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

☐ 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 _____

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。

