




**REQUEST FOR INVESTMENT- LINKED ASSURANCE SCHEME  
("ILAS") SERVICES (For Cheerful Life / U-Select /  
AIA 2-in-1 Protection Linked Plan (Single Premium))("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（整付保費）（「兩全保」）**

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

|                       |                          |                        |   |
|-----------------------|--------------------------|------------------------|---|
| Policy Number<br>保單號碼 | Name of Insured<br>受保人姓名 | Name of Owner<br>持有人姓名 | <br>P1482063 |
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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whether through our AIA Financial Planner or your broker or otherwise, the instruction provided on the form cannot be withdrawn, any subsequent change of the instructions will be treated as a new request, which will be processed after the former request is effected by the Company.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****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）

| Policy No.<br>保單號碼 | Premium due date<br>保費到期日 | Relationship with owner<br>與保單持有人之關係 | Outstanding Levy<br>尚欠保費徵費 | Currency / Amount<br>貨幣 / 金額 |
|--------------------|---------------------------|--------------------------------------|----------------------------|------------------------------|
|                    |                           |                                      |                            |                              |
|                    |                           |                                      |                            |                              |

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

| Application No.<br>新保單申請號碼 | Applicant's Name<br>申請人姓名 | Applicant's Relationship with owner<br>申請人與保單持有人之關係 | Currency / Amount<br>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

| Policy No.<br>保單號碼 | Relationship with owner<br>與保單持有人之關係 | Currency / Amount<br>貨幣 / 金額 |
|--------------------|--------------------------------------|------------------------------|
|                    |                                      |                              |

☐ Pay the AIA Vitality membership fee 繳付AIA Vitality健康程式會費

| AIA Vitality Membership No.<br>AIA Vitality 健康程式會員編號 | Relationship with insured<br>與受保人之關係 | Currency / Amount<br>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：**



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。

[illegible]



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Other policy number(s) 其他保單號碼：

Email address 電郵地址：

## DECLARATION 聲明

- 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）

**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。

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\* 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。



OPPOSF47(C).0423