




**REQUEST FOR INVESTMENT- LINKED ASSURANCE SCHEME
("ILAS") SERVICES (For Cheerful Life / U-Select only)**
投資相連壽險計劃服務申請表 (只適用於「自悠人生」/「您想」)

(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	
<div></div>	<div></div>	<div></div>	P1482018

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whether through our AIA Financial Planner or your broker or otherwise, the instruction provided on the form cannot be withdrawn, any subsequent change of the instructions will be treated as a new request, which will be processed after the former request is effected by the Company.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

Policy No. 保單號碼	Premium due date 保費到期日	Relationship with owner 與保單持有人之關係	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

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

☐ 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

☐ 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：

We will update the telephone number to the above policy(ies) accordingly if it is different from the Company record. We will notify you by SMS upon completion of the registration. 如此號碼跟公司紀錄不同，我們會更新有關號碼至以上保單。我們將於完成登記當日發送短訊通知閣下。

Identity proof must be provided for registration of FPS / e-BankIn if you have not submitted a **valid HKID / Passport** before.
如未曾提供**有效的香港身份證 / 護照**，需遞交身份證明文件作登記「轉數快」/「電子入賬服務」之用。

請以易號選擇下列**其中一種**「識別代號」# 及提供以下相關資料。若**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。

() _____
Country Code Telephone No
國際電話區號 手機號碼

「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，包括您的手機號碼，電郵地址或「轉數快」識別號碼。

3) e-BankIn account must also be registered under the policy owner. 電子入賬服務的戶口必須同樣為保單持有人。

$$\begin{array}{|c|c|c|} \hline & & \\ \hline \end{array} - \begin{array}{|c|c|c|} \hline & & \\ \hline \end{array} - \begin{array}{|c|c|c|c|c|c|c|c|} \hline & & & & & & & \\ \hline \end{array}$$

[illegible]

By using the FPS / e-BankIn, I / we confirm I / we have read and agreed to be bound by the terms and conditions as set out on AIA Corporate Website (www.aia.com.hk). 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AIA公司網頁內(www.aia.com.hk)列明之條款及條件，並同意受此約束。

2. ☐ Reduce Regular Investment Premium Amount 減少定期投資保費金額

Amount 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 適用於「您想」投資連繫壽險計劃

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%

For U-Select 適用於「您想」投資連繫壽險計劃

每項投資選擇(現金分派)之最低轉換入金額為2,000美元 或16,000港元。

[illegible]

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) for switching or investment allocation 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.

就投資分配或調配所揀選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 be 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. ☐ Other instructions 其他指示

□

Other policy number(s) 其他保單號碼：

Email address 電郵地址：

DE

- 若您於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”財務策劃顧問/ 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 and understood the AIA Personal Information Collection Statement ("AIA PIC").

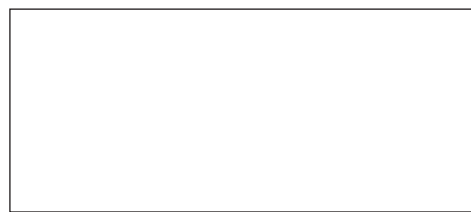
I / We declare and agree that any personal data and other information relating to me / us or my / our policy(ies) or investments contained in this application or collected, obtained, compiled or held by the Company by any means from time to time may be collected and utilized in accordance with the AIA 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, 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，及可向貴公司索取。




Signature of Owner / Trustee
持有人 / 信託人簽名

on

月

日

年
於



Signature of Assignee
受讓人簽名 (if applicable 如適用)

on

月

日

年
於

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



Download our mobile app AIA Connect to
manage your policy anytime, anywhere!
下載AIA「友聯繫」手機應用程式以便輕鬆
管理您的保單！