



POLICY ACCOUNT VALUE REQUEST FORM  
保單戶口價值申請表

Policy Number 保單號碼	Name of Insured 受保人姓名	Name of Owner 持有人姓名
<input type="text"/>	<input type="text"/>	<input type="text"/>
Area Code 區域編號	Agency / Broker Name 營業員組別 / 經紀名稱	Agent / Broker Code 營業員號碼 / 經紀號碼
<input type="text"/>	<input type="text"/>	<input type="text"/>
Agency Code 營業員組別編號	Agent / TR's Name 營業員 / 業務代表姓名	Agent / TR's Tel. No. 營業員 / 業務代表聯絡電話
<input type="text"/>	<input type="text"/>	<input type="text"/>



00132154

TR Membership Number 業務代表會員號碼  
(For Brokers only 僅供經紀使用)

☐ IA

☐ ANG

Remark: If the stated AIA financial planner / broker / IFA on this form is not my current servicing AIA financial planner / broker / IFA, I give consent to him/her to handle and follow up my request.

備註：倘若在上述表格上填寫的財務策劃顧問 / 經紀 / 獨立理財顧問並不是本人目前的財務策劃顧問 / 經紀 / 獨立理財顧問，本人同意他/她處理並跟進我的要求。

1. Withdraw 提取

Section A: Dividend / Endowment / Guaranteed Cash Payments / Guaranteed Monthly Annuity Payment / Guaranteed Monthly Income / Guaranteed Annual Income / Non-Guaranteed Monthly Annuity Payment / Non-Guaranteed Monthly Income 甲部：紅利 / 可支取現金 / 保證現金 / 保證每月年金款項 / 保證每月入息 / 保證每年入息 / 非保證每月年金款項 / 非保證每月入息

☐ Dividend 紅利 \$

☐ \*Endowment 可支取現金 / Guaranteed Cash Payments 保證現金 / Guaranteed Monthly Annuity Payment 保證每月年金款項 / Guaranteed Monthly Income 保證每月入息 / Guaranteed Annual Income 保證每年入息 \$

(If there is insufficient amount in the endowment account, we will withdraw the balance from Future Premium Deposit Account.  
如可支取現金戶口內沒有足夠金額，本公司會從現金儲備金戶口中提取所需餘額。)

☐ Non-Guaranteed Monthly Annuity Payment 非保證每月年金款項 \$   
(Applicable to AIA Deferred Annuity Plan 適用於AIA延期年金計劃)

☐ \* Non-Guaranteed Monthly Income 非保證每月入息 \$  (Applicable to Golden Years Income Plan  
適用於「年金寶」入息計劃)

\* Please note that the withdrawal of Dividend will result in reduction of future Non-Guaranteed Monthly Income (if applicable).  
提取紅利會減少將來之非保證每月入息（如適用）。

\* We will withdraw the amount in Future Premium Deposit Account first (if any).  
我們會先從現金儲備金戶口提取（如有）。

Section B: Future Premium Deposit Account / Deposit for Policy Change 乙部：現金儲備金戶口 / 保單更改存款

☐ Future Premium Deposit Account 現金儲備金戶口 \$

☐ Deposit for Policy Change 保單更改存款 \$

Company reserves the right to arrange the payment via the original deposit channel of such fund. Please visit Customer Corner for the Terms of Use of Future Premium Deposit Account. 公司保留權利以該款項的存款渠道安排付款。請登入「客戶專頁」查閱保費儲備金戶口之使用條款。

Section C: Partial Surrender 丙部：部分退保

☐ \*Guaranteed Cash Value of Basic Plan 基本計劃之保證現金價值 \$  or 或  
Reduce Sum Assured / Principal Amount<sup>^</sup> / Guaranteed Monthly Annuity Payment / Guaranteed Monthly Income to 減少保額 / 基本金額 / 保證每月年金款項 / 保證每月入息至：\$

\* Please note that the withdrawal of guaranteed cash value result in reducing Sum Assured / Principal Amount<sup>^</sup> / Guaranteed Monthly Annuity Payment / Guaranteed Monthly Income will be considered as being partially surrendered, the proportionate guaranteed cash value less any outstanding loan will be paid. The Terminal Dividend (if applicable) will also be paid out proportionally.  
提取保證現金價值會引致保額 / 基本金額<sup>^</sup> / 保證每月年金款項 / 保證每月入息減少並會被視為部分退保，退還之保證現金價值將先減去任何尚欠之借款。終期紅利（如有）亦會按比例支付。

<sup>^</sup> can also be expressed as Principal Sum / Principal Amount / Face Amount in accordance with your Basic Plan Contract. For any medical and accident coverage, this can be defined as Benefit Amount.  
視乎閣下的基本計劃契約而定，亦可表達為主要保額 / 基本金額 / 基本保額。醫療及個人意外保障則可定義為利益金額。

## Section D: Cashing Reversionary Bonus 丁部：套現復歸紅利

<input type="checkbox"/> * Withdraw Cash Value of Reversionary Bonus 提取復歸 紅利現金價值: \$		or 或
Reduce face value of the Reversionary Bonus to 減少復歸紅利面值至: \$		

\* The face value of the Reversionary Bonus will be reduced accordingly after the encashment of the Reversionary Bonus, and thus, reducing the future value of the Policy.  
套現紅利後，復歸紅利的面值會減少，及令保單將來的價值減少。

**Payment Instruction for Part 1 – Section A - D**  
**支払方法－第一部分（甲－丁部）**

**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 notification SMS to be sent out upon the completion of the FPS / e-BankIn registration. We will update the telephone number to the above policy(ies) accordingly if it is different from the Company record.

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「轉數快／電子入賬服務」登記當日發送有關短訊。如此號碼跟公司紀錄不同，我們會更新有關電話號碼至以上保單。

Owner's Mobile Number ( )  
 持有人手提電話號碼： 國際電話區號 手機號碼

## PART B 乙部

## Section 1: Information for FPS Registration 第一部分：「轉數快」登記資料

(Please select transferring policy benefits paid to either FPS OR e-BankIn)

(請選擇「轉數快」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\* 轉數快\*

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**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。

<input type="checkbox"/> Email 電郵地址： <hr/>	<input type="checkbox"/> Mobile Number 手機號碼： (                    ) <hr/>
<input type="checkbox"/> FPS Identifier 「轉數快」識別號碼： <hr/>	<div style="display: flex; justify-content: space-between;"> <div> Country Code 國際電話區號 </div> <div> Telephone No 手機號碼 </div> </div> <hr/>

\* **“FPS Service”** means the services provided by you 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, together with its successors and assigns.

# 「快速支付系統服務(轉數快)」指閣下不時向本人提供的服務，以讓本人使用由香港銀行同業結算有限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 your 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，包括您的手機號碼，電郵地址或「轉數快」識別號碼。

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

(Please select transferring policy benefits paid to either FPS OR e-BankIn)

(請選擇「轉數快」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 電子入賬服務

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. 任何列有戶口持有人及銀行賬戶號碼最近期（必須在最近三個月內發出）的銀行存摺／信件／月結單（包括電子結單）／有效銀行卡副本。

[illegible]

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)

[illegible]

### Important Notes 重要事項

1. Only accept HKD Account opened in Hong Kong. 只接受在香港開立之港元戶口。
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。

**Declaration & Authorization 聲明及授權**

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。

**If e-Bankin / FPS has not been 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：**

- a) Cheque Payment in 支票貨幣：  
☐ Hong Kong Dollar 港元  
☐ Policy Currency 保單貨幣
- b) Send cheque to 請將支票：  
☐ My correspondence address registered with the company 寄往本人於公司登記的通訊地址  
☐ The above named agent / broker 遞送給以上營業員 / 經紀

If not indicated above, the cheque will be issued in policy currency (ii) and sent to the Owner's correspondence address.

如沒有註明指示，支票會以保單貨幣(ii)發出並寄往保單持有人的通訊地址。

- (i) Please submit copies of ID card / passport of the Owner / Trustee. In the case of corporate owner, company documents are required pursuant to the Anti-Money Laundering and Counter-Terrorist Financing (Financial Institutions) Ordinance. Our Company reserves the right to ask for additional documents.

請遞交持有人 / 信託人的身份證 / 護照副本。倘以公司名義之持有人，必須根據現行之「打擊洗錢及恐怖分子資金籌集（金融機構）條例」遞交所需文件。本公司保留權利索取其他文件。

- (ii) 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.

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。

- (iii) 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。

- ☐ Pay the premium and levy (for Hong Kong policies) of the above policy due on 

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 YYYY年  
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

- ☐ Repay the loan on policy no. 繳付保單貸款，保單號碼：

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 (US\$/HK\$ 

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- ☐ 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	Applicant's Relationship with owner 申請人與保單持有人之關係	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

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

提取基本計劃之現金價值以作繳付新保單作首期之按金須符合以下條件：

1. The Owner of the new application and the owner of above policy must be the same person.  
新保單與上述保單之持有人必須相同。
2. Please submit a copy of proof of the owner's correspondence address issued within the last 3 months. We will send any confirmation and refund cheque paid in respect of this policy / these policies to the correspondence address.  
請提供保單持有人最近三個月內之通訊地址證明文件副本。我們將郵寄所有確認文件及退款支票（如有）至保單持有人的通訊地址。
3. Please complete the Important Facts Statement - Policy Replacement (Applicable to Hong Kong Policy Only) or Customer Declaration for Policy Replacement (Applicable to Macau Policy Only) together with the Insurance Application form, if applicable.  
請填寫重要資料聲明書－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；如適用。
4. If you have more than one policy with our Company and wish to transfer the surrender value of the surrendered policy to the other policy(ies), we will not process the request for transfer until such request is approved by us. We will not be responsible for any consequences to that (those) other policy(ies) pending the completion of the transfer.  
若您在本公司持有一份以上的保單，希望將退保的保單的退保價值轉移到其他保單，有關要求需經本公司批准後才會進行。待保單價值轉移完成期間我們對該其他保單的任何後果概不負責。
5. For transfer of the surrender value to pay the deposit for the new policy being applied for, we reserve the right to reject if Company requirements are not met. For details please contact your AIA Financial Planner or IFA / Broker.  
若以退保利益繳付新保單作首期之按金，我們有權拒絕未符合本公司要求的申請表。有關要求的詳細資料，請聯絡您的友邦財務策劃顧問或保險／理財顧問。

2. Change the payment option, with effect from next anniversary / monthiversary (only applicable to Monthly Annuity Payment / Monthly Income) 更改給付辦法，由下期週年日 / 週月日（只適用於每月年金款項 / 每月入息）生效：

## Section A: Dividend 甲部：紅利

- ☐ Cash Payment 支取現金   
 ☐ Dividend Accumulations 積存生息   
 ☐ Premium Deduction 扣除保費   
 ☐ Paid Up Additions 加購付清保險  
☐ Loan Reduction, and the balance, if any, to 減去借款，若有餘額則：   
☐ Cash Payment 支取現金   
☐ Dividend Accumulations 積存生息

**Section B: Endowment / Guaranteed Cash Payment / Guaranteed Annual Income / Monthly Annuity Payment / Monthly Income** 乙部：可支取現金 / 保證現金 / 保證每年入息 / 每月年金款項 / 每月入息

- ☐
- Cash Payment 支取現金
- ☐
- Accumulations 積存生息

**Payment Instruction for Part 2 – Section A and B 支付方法 – 第二部分（甲及乙部）**  
(If cash payment is chosen 如選擇支取現金)

- ☐ Hong Kong Dollar      Send cheque to:      ☐ My correspondence address registered with the company  
 港元      請將支票：      寄往本人於公司登記的通訊地址  
☐ Policy Currency      ☐ The above named agent / broker  
 保單貨幣      遞送給以上營業員 / 經紀

If not indicted above, the cheque will be issued in policy currency (ii) and sent to the Owner's correspondence address.  
如沒有註明指示，支票會以保單貨幣(ii)發出並寄往保單持有人的通訊地址。

3. ☐ Other instructions 其他指示

The first step in the process of developing a business plan is to conduct a thorough market research. This involves identifying your target audience, understanding their needs and preferences, and analyzing the competitive landscape. Once you have gathered this information, you can begin to develop your business strategy, which will outline how you intend to achieve your goals and objectives.

Next, you need to determine the financial requirements of your business. This includes estimating the costs of starting and operating your business, as well as projecting the revenue you expect to generate. You should also consider the timing of your cash flows and the sources of financing you may need to secure.

Once you have completed these initial steps, you can begin to write your business plan. This document should provide a clear and concise overview of your business, its mission, vision, and strategic direction. It should also include detailed financial projections and a marketing plan that outlines how you will reach your target audience.

In addition to writing your business plan, it is important to seek feedback from others who are experienced in business development. This can help you identify areas where you may need to make adjustments or improvements to your plan. Finally, once you have finalized your business plan, you should review it regularly to ensure that it remains relevant and effective as your business grows and evolves.

**DECLARATION**

I / We understand that premium difference between original Sum Assured / Principal Amount<sup>^</sup> and new Sum Assured / Principal Amount<sup>^</sup> will not be refunded for Partial Surrender.

**聲明**

本人 / 我們明白原本的保額 / 基本金額<sup>^</sup>跟新的保額 / 基本金額<sup>^</sup>之保費差額將不會因為部分退保而退還。

<sup>^</sup> can also be expressed as Principal Sum / Principal Amount / Face Amount in accordance with your Basic Plan Contract. For any medical and accident coverage, this can be defined as Benefit Amount.

<sup>^</sup> 視乎閣下的基本計劃契約而定，亦可表達為主要保額/基本金額/基本保額。醫療及個人意外保障則可定義為利益金額。

**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](http://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](http://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 於 

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 MM月 

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 DD日 

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 YYYY年

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

on 於 

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 MM月 

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 DD日 

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 YYYY年

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



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