




**REQUEST FOR INVESTMENT-  
LINKED / UNIVERSAL LIFE PLAN SERVICES**

**投資連繫式 / 萬用壽險計劃服務申請表**  
(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	 P1472031
<input type="text"/>	<input type="text"/>	<input type="text"/>	

**IMPORTANT NOTES 注意事項：**

1. 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)
2. 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)
3. 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。
4. 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。
5. 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。
6. 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。
7. 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 / 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。
8. 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。
9. 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。

**PART A: Investment-Linked Plan**  
**甲部：投資連繫式計劃****1.  Withdrawal of unit 提取單位**\*Code  
代號No of units  
單位數目**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。**

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**If e-Bankin / FPS is requested immediately, please complete Part D.**  
**如要求即時登記「電子入賬服務」/「轉數快」，請填妥丁部。**

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**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：**

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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。 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 與保單持有人的關係	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

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 與保單持有人的關係	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。

Auto-Rebalancing will be automatically cancelled once request for fund withdrawal is accepted. To continue auto-rebalancing, please specify in Part 2.1.

基金提取之申請接受後，除非於第二項的第一部份列明，否則自動平衡投資（如有）將會自動取消。

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## 2. Change of Investment Allocation and Switching 更改投資分配及調配

Please confirm the statement in Part 2.4 if the risk level of your selected investment option(s) in Part 2.1, 2.2 and / or 2.3 (Change Dollar Cost Averaging Allocation) mismatches with your current risk profile. “

倘若在第二項的第一部分、第二部分及 / 或第三部分（更改「每月平均成本投資」基金投資分配）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，請在第二項的第四部分之聲明中確認。

### 2.1. Change Investment Allocation 更改投資分配

(Not applicable to U-Select / Cheerful Life 不適用於「您想」/「自悠人生」)

- for Regular premium and / or Regular top up  
- 基本保費及 / 或定期額外投資保費

With / Continue Auto-Rebalancing  
設立 / 繼續自動平衡投資

Stop Auto-Rebalancing  
取消自動平衡投資

Minimum allocation to a selected code is 10%

所選擇的每項代號之分配不得少於10%

Auto-Rebalancing will be automatically cancelled if investment allocation is changed, unless specified above.

更改投資分配後，除非於上述列明，否則自動平衡投資（如有）將會自動取消。

\*Code  
代號

Investment  
Allocation  
投資分配

-----J = -----J%

-----J = -----J%

-----J = -----J%

-----J = -----J%

-----J = -----J%

-----J = -----J%

-----J = -----J%

-----J = -----J%

-----J = -----J%

-----J = -----J%

Total 共 = 100%

### 2.2. Switching 調配

For U-Select 適用於「您想」投資連繫壽險計劃

The minimum investment amount for each Investment Option (Cash Distribution) through switch-in is US\$2,000 or HK\$16,000.

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。

#### Switch out 轉換出

\*Code  
代號

No of units  
單位數目

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

#### Switch in 轉換入

\*Code  
代號

Percentage  
百分比

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

-----J = -----J

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-----J = -----J

Unless specified in Part 2.1, the current investment allocation remains unchanged.

除非列明於第二項內的第一部分，現有的投資分配將維持不變。

Auto-Rebalancing will be automatically cancelled once request for switching or allocation is accepted. To continue Auto-Rebalancing, please specify in Part 2.1 above.

調配之申請接受後，除非於第二項第一部分列明，否則自動平衡投資（如有）將會自動取消。



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4.  Other instructions 其他指示

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

1.  Withdrawal of Account Value / Fleximoney 提取戶口金額 / 靈活錢戶口 US\$美元金額

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 Part D.

如要求即時登記「電子入賬服務」/「轉數快」，請填妥丁部。

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：

- 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。

2.  Pay Fleximoney 繳付靈活錢戶口 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。

**PART C: Internet Service**  
丙部：網上服務

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：





