下載國壽海外APP
享受升級用戶體驗！即時輕鬆辦理**服務申請**或**查閱進度**。

中國人壽 CHINA LIFE 海外

保單號碼 Policy No.										

保單財務調配/退保申請表 Request for Financial Services / Surrender Form

保單持有人和受保人資料 Particulars of Policyholder and Insured

保單持有人姓名/名稱 Name of Policyholder	
受保人姓名 Name of Insured	

保險中介人資料 Particulars of Insurance Intermediary

保險中介人姓名/名稱 Name of Insurance Intermediary

保險中介人編號 Insurance Intermediary's Code

聯絡電話 Contact No.

重要須知 Important Note

1. 此表格不適用於投資相連保險計劃。This form is not applicable to Investment-linked Assurance Scheme.
2. 此表格中所用之「本公司」或「貴公司」之表述指中國人壽保險（海外）股份有限公司。The expression ""the Company"" used in this form refers to China Life Insurance (Overseas) Company Limited.
3. 保單持有人必須在此表格內任何更改或修改的地方以完整簽署作實。Any changes or amendments in this form must be countersigned by the Policyholder in full signature.
4. 請參閱第 7 頁所需文件指引以便處理閣下的申請。Please refer to the Documents Checklist on P.7 for documents required to process your request.
5. 本公司有權隨時更新此表格，並接受或拒絕未符合本公司要求的表格。請登入本公司網站 www.chinalife.com.hk 瀏覽及下載最新版本。The Company has the right to update this form from time to time and to accept or reject the form if the Company's requirements are not fulfilled. Please visit our website www.chinalife.com.hk to view and download the latest version of the form.
6. 如未能及時提交需要的資料，本公司可能無法處理閣下的申請甚或拒絕閣下的申請，亦不會承擔任何可能因此引致的損失。If the necessary information/form(s) cannot be provided in a timely manner, the Company may not be able to process your application or may even reject your application and will not bear any loss that may arise.
7. 如申請未能符合本公司的有關規定，本公司有權拒絕有關申請。The Company shall have right to reject the application if the application fails to fulfill Company's requirement(s).
8. 保險中介人或銀行職員收到此表格並不代表本公司亦已收到。The receipt of this form by an Insurance Intermediary or Bank Staff does not constitute receipt by the Company.
9. 請將已填妥及簽署的表格正本連同所需證明文件寄往香港灣仔軒尼詩道 313 號中國人壽大廈 24 樓中國人壽保險(海外)股份有限公司。Please send the original duly completed and signed form(s) and document(s) required to China Life Insurance (Overseas) Co. Ltd., 24/F, CLI Building, 313 Hennessy Road, Wan Chai, Hong Kong.

第一部份 保單價值提取 Part 1 Policy Value Withdrawal

保單價值類別 Type of Policy Value	金額 (以保單貨幣填寫) Amount (in Policy Currency)
可支取現金/保證年金金額 Cash Coupons / Guaranteed Annuity Payment	☐ 全部 All ☐ 指定金額 Specified amount $
紅利 Dividend	☐ 全部 All ☐ 指定金額 Specified amount $
預繳保費 (預繳保費提取費用將從提取金額中扣除) Prepaid Premium (Prepaid premium withdrawal fee will be deducted from the withdrawal amount)	☐ 全部 All
萬用壽險戶口價值 (提取費用及收費將從提取金額中扣除) Account Value of Universal Life Insurance (Withdrawal fee and charges will be deducted from the withdrawal amount)	☐ 指定金額 Specified amount $
其他 Other	☐ 全部 All ☐ 指定金額 Specified amount $

注意 Note：

1. 請同時填寫第五部份「付款指示」及第六部份「轉保聲明」。Please also complete Part 5 "Payment Instruction" and Part 6 "Policy Replacement Declaration".
2. 如作任何保單價值提取，保單內隨後之利益將會減少。已提取的保單價值不可以還原至保單內。By making policy value withdrawal, the future benefits under the Policy will be reduced. The policy value cannot be restored to the Policy after withdrawal.

保單號碼 Policy No.										

注意(續) Note(Continued)：

3. 閣下只可一筆過全數提取尚未使用的預繳保費金額(包括利息，如有)。You can withdraw the unused prepaid premium (including interest, if any) at a time only.
4. 萬用壽險的領取要求會因個別產品而有所不同，詳情請參閱保單條款。The withdrawal requirements of Universal Life Assurance will vary depending on the individual Universal Life product. Please refer to the policy provisions for details.

第二部份 保單貸款 Part 2 Policy Loan

☐ 最高貸款額 Maximum Loan Amount

☐ 指定金額(以保單貨幣填寫) Specified amount (in Policy Currency) $ ____________

注意 Note：

請同時填寫第五部份「付款指示」及第六部份「轉保聲明」。Please also complete Part 5 "Payment Instruction" and Part 6 "Policy Replacement Declaration".

條款及細則 Terms and Conditions：

本人/我們向貴公司證實從未因破產或清盤而被起訴或訴訟仍未了結。本人/我們聲明已閱讀並明白下列有關之條款，並同意遵守下列的條文以及上述保單的保單所載的貸款條款：I/We certify to the Company that no proceedings in bankruptcy or insolvency against me/us have been instituted or are pending. I/We declare that I/we have read and understood the relevant terms and conditions stated below, and agree to be bound by the same and by the Policy Loan Provisions stipulated in the above policy:

1. 最高貸款額可達當時保單現金價值的 90% (視乎個別保險計劃而有所不同及萬用壽險除外)/指定的萬用壽險產品最高貸款額則為當時退保價值的 90%，及扣除保單的任何負債(若有)。如所要求的貸款金額多於可提取的貸款金額，則以最高貸款額為準。The maximum loan amount is up to 90% of the policy cash value (depending on the type of insurance plan, and Universal Life products are excluded)/up to 90% of the surrender value for designated Universal Life products, less any existing indebtedness (if any). The maximum loan amount will be processed if the requested amount is larger than the loan amount available.
2. 貸款利息將自貸款批核日起每日累計。該等累計利息將成為上述保單對貴公司之欠債。貸款利息應於每年保單週年日、受保人身故、退保、保單失效或本公司指定的日期償還。所有到期未償還之利息，將納入貸款本金金額內，以同等年利率及條款計算，直至全數貸款清還為止。The interest on loan shall be accrued daily from the date when the policy loan is approved by the Company. The accrued interest shall constitute an indebtedness to the Company. Interest shall be repaid on the anniversary date of the Policy in each year or on the date of death of the insured, surrender, lapse or on any other date specified by the Company. Any interest unpaid when due shall be added to the principal of the loan and bear interest at the same rate and on the same conditions until the loan is fully repaid.
3. 若上述保單失效或以任何形式終止，保單之欠款將從退保發還金額中扣除。If the Policy shall lapse or become forfeited in any manner, the indebtedness of the Policy shall be deducted from the surrender value of the Policy.
4. 若上述保單期滿，保單之欠款將從貴公司應付之金額中扣除。If the policy shall mature, the indebtedness of the Policy shall be deducted from the amount payable by the Company.
5. 當保單之總負債金額等於或超過退保現金價值時(包括應付利息)，本保單即告終止，並無任何金額可獲支付。The policy will be terminated once the total indebtedness, including interest accrued and due, is equal to or greater than the cash value, and no monies will be payable by the Company upon such termination.
6. 除個別產品外，本公司現行保單貸款利息之年利率為 7%，而本公司有絕對酌情權定期檢討及調整此息率。The current interest rate on policy loan is 7% per annum except for specific products, which is subject to regular review and adjustment at the Company's sole absolute discretions.

第三部份 償還保單貸款 Part 3 Policy Loan Repayment

☐ 償還全數貸款金額及利息 Repay FULL loan and interest amount

☐ 償還部份貸款金額及/或全數貸款利息 Repay PARTIAL loan amount and/or FULL loan interest $ ____________

注意 Note：

1. 請以保單貨幣填寫償還部份貸款金額。Please fill in the partial loan repayment amount in Policy Currency.

第四部份 終止保單 Part 4 Policy Termination

☐ 冷靜期內取消保單 Policy Cancellation within Cooling-off Period

☐ 保單退保 Policy Surrender

注意 Note：

1. 請同時填寫第五部份「付款指示」及第六部份「轉保聲明」(冷靜期內取消保單除外)。Please also complete Part 5 "Payment Instructions" and Part 6 "Policy Replacement Declaration" (except apply for Policy Cancellation within Cooling-off Period).
2. 如提早終止保單，閣下 i) 所得的退保價值(如有)可能會少於閣下已支付的總保費、ii) 或會損失保單的累計權益，即閣下可能會蒙受損失。此外，閣下或需要承擔因退保而衍生的退保費用。Early surrendering the Policy, you i) may receive the surrender value (if any) less than your total paid premium, ii) may lose the accrued benefits of the Policy. This means you may suffer a loss. Further, you may incur surrender charges for policy surrender.
3. 保單一經終止，閣下將失去保單提供的保障及在任何情況下均不可以復效及/或還原保單，及閣下於將來或未能以相同條款獲得相若的保障。而在保單終止後，本公司對保單的責任便告了結。You will lose the benefits under the Policy and you may not be able to reapply for the same benefit on the same terms/conditions in future, also the Policy cannot be reinstated or restored in any circumstance after policy termination. The liability of the Company upon termination of the Policy is hereby completely discharged.

保單號碼 Policy No.										

注意(續) Note(Continued)：

4. 任何於本公司收到及完成審批退保申請前已繳交之保費將不獲退還。Any premium paid prior to our receipt and approval of the surrender request will not be refunded.
5. (適用於提供「轉換年金權益」的保單) 如保單已選定退保後的年金付款方式，本公司將不會按此表格第五部份「付款指示」進行付款，亦即只會按已選定的年金付款方式發放年金。(Applicable to policy that provide "Annuity Conversion Option") If the policy has selected an annuity payout option after surrender, the Company will not follow the payment instructions in Part 5 of this form, and will pay the annuities by following the annuity payout option previously selected.

第五部份 付款指示 Part 5 Payment Instruction

付款貨幣選擇 (如無註明，款項將以保單貨幣發放) Payment Currency Option (If not specified, payment will be issued in policy currency)

☐ 保單貨幣 Policy Currency ☐ 港元 HKD

A. 資金調配 Fund Transfer to Policy

1. 用途 Purpose
   - ☐ 抵繳保費及保費徵費 Offset Premium and Levy
   - ☐ 償還貸款金額及/或全數貸款利息 Repay Loan Amount and/or FULL Loan Interest
   - ☐ 償還自動保單貸款及利息 Repay Automatic Premium Loan and Interest
2. 保單號碼/要保書編號 Policy No./ Application No. ____________
3. 付款分配 Payment Allocation

☐ 全數金額^ Full Amount^ ☐ 指定金額* Specified Amount* $ ____________

B. 抵押保單專用 For Policy that has been assigned to the Assignee only

☐ 以指定付款方式全數金額支付予保單持有人* Payable to the Policyholder in full amount by specified payment method*

☐ 以劃線支票支付予受讓人# Payable to the Assignee by a crossed cheque#

1. 受讓人姓名/名稱 Name of Assignee ____________
2. 支票送遞方式及聯絡人電話號碼 Cheque Delivery Method and Phone No. of Contact Person ____________
3. 付款分配 Payment Allocation

☐ 全數金額^ Full Amount^ ☐ 指定金額* Specified Amount* $ ____________

^ 如選擇「全數金額」，無須填寫「C. 付款方式」部份。If select “Full Amount”, you are not required to fill in section “C. Payment Method”.

* 如有餘額/金額支付予保單持有人，請填寫「C. 付款方式」部份。If there is remaining balance / an amount to be paid to the Policyholder, please complete section “C. Payment Method”.

如欲以劃線支票以外的付費方式支付予受讓人，請於「C. 付款方式」部份的「4. 其他指示」提供有關詳情。If the payment needs to be paid by another payment method other than a crossed cheque, please provide relevant details in “4. Other Instruction” under section “C. Payment Method”.

C. 付款方式 Payment Method

1. 轉賬至本地銀行戶口 Transfer to Local Bank Account

☐ A. 轉賬至預設收款銀行賬戶 Transfer to Default Payment Account

☐ B. 轉賬至非預設收款銀行賬戶(請同時填寫以下銀行賬戶資料) Transfer to Non-Default Payment Account (Please fill in the below bank information.)

銀行名稱 Name of Bank	銀行編號 Bank code	分行編號 Branch code	銀行賬戶號碼 Account No.

2. 電匯至海外銀行戶口 Telegraphic Transfer to Overseas Bank Account

銀行及分行名稱 Name of Bank and Branch ____________

銀行賬戶號碼 Account No. ____________

收款銀行地址 Bank Address ____________

國際匯款代碼 SWIFT Code ____________

賬戶持有人的海外聯絡電話 Overseas Contact No. of Bank Account Holder ____________

賬戶持有人的海外通訊地址 Overseas Correspondence Address of Bank Account Holder ____________

3. 支票支付 (以劃線支票支付予保單持有人) Cheque Payment (Payable to the Policyholder by a crossed cheque)

☐ 以平郵寄至通訊地址 By surface mail to correspondence address

☐ 經保險中介人轉交 Deliver via Insurance Intermediary

☐ 親身到分行領取(只適用於經銀行投保的保單) To be collected at Branch in person (Applicable to policy applied via by bank only)

分行名稱/編號 Branch Name/Code

☐ 親身到客戶服務中心領取 To be collected at Customer Service Centre in person

☐ 保單持有人領取 To be collected by the Policyholder

☐ 授權人領取 To be collected by the Authorized Person

授權人姓名 Name of Authorized Person	授權人聯絡電話 Contact No. of Authorized Person	授權人身份證明文件號碼 I.D. No. of Authorized Person

☐ 灣仔 Wan Chai ☐ 其他地點# Other Location#

請於 www.chinalife.com.hk 查閱香港境內其他地點的客戶服務中心(如有)。*Please visit our website www.chinalife.com.hk to obtain information of other Customer Service Centre location(s) in Hong Kong (if any).

4. 其他指示 Other Instruction

注意 Note：

1. 銀行賬戶持有人必須為保單持有人，不接受聯名戶口。The bank account holder must be the same as the policyholder. Joint account is not accepted.
2. 轉賬或電匯至銀行賬戶須遞交銀行賬戶證明文件，而銀行賬戶證明文件必須顯示賬戶持有人姓名及賬戶號碼，並可以於文件上遮蓋其他非必要的資料。Transfer or Telegraphic Transfer to bank account requires the submission of bank account proof, which must clearly display the account holder's name, and account number; unrelated content can be masked.
3. 如選擇保單貨幣以外的貨幣領取保單價值或利益，款項將於付款處理當時按本公司的匯率進行兌換。保單持有人須自行承擔因匯率變動衍生之風險及貨幣兌換時所產生的匯兌損益(如有)。If choosing a currency other than the policy currency to receive policy values or benefits, the fund will be processed and exchanged according to the company's exchange rate at the time of the transaction.The policyholder has to bear for any potential exchange rate risks and associated gain or loss (if any) due to the currency exchange.
4. 實際到賬時間會因應個別銀行而有差異，可向有關銀行查詢。The actual time for receiving the funds may vary depending on the bank, please contact the bank for details.
5. 如未有足夠資料顯示銀行賬戶持有人為保單持有人或因故未能成功入賬，有關款項將以劃線支票形式給付。發出支票的處理時間會較銀行轉賬為長。If there is insufficient information to confirm that the bank account holder is the policyholder, or the payment cannot be credited for any reason, the relevant payment will be paid by a crossed cheque instead. The processing time for cheque issuance will be longer compared to bank transfer.
6. 如保單持有人選擇的支付貨幣是港元或人民幣以外貨幣，即使付款失敗，相關的銀行手續費(如適用)及匯率損差(如適用) 須由客戶自行承擔，並將於給付款項中自動扣除。If the policyholder chooses a currency other than HKD or RMB as the payment currency, even if the payment fails, the related bank charge (if applicable) and any associated gain or loss (if applicable) have to be borne by the policyholder, and will be automatically deducted from the payment amount.

保單號碼 Policy No.										

第六部份 轉保聲明 Part 6 Policy Replacement Declaration

重要提示 Important Notes：申請提取保單價值(提取暫收款賬戶除外)、保單貸款或保單退保，必須填寫此部分內容。Must complete this part when applying for Policy Value Withdrawal (except apply for withdrawal of the Temporary Deposits Account), Policy Loan or Policy Surrender.

閣下是否使用或打算使用此人壽保險保單的部分或全部資金，或使用或打算使用通過減少此人壽保險保單的應付保費而節省的金額，以資助閣下於過去 12 個月內新申請的人壽保險保單(如有)？例如，該等資金或金額可能來自從閣下此人壽保險保單中提取的累積紅利、累積可支取現金、保證年金、尚未使用的預繳保費、萬用壽險賬戶價值、保單貸款或退保價值等。如是，該等情況將被視為「轉保」。Are you using or do you intend to use some or all of the funds arising from the above-mentioned policy, or any savings made by reducing the premium payable under the above-mentioned policy, in order to fund the new life insurance policy (if any) which is purchased within 12 months prior to the date of this application? For example, such funds or savings may arise from taking out accumulated dividends, accumulated cash coupons, guaranteed annuity payments, unused prepaid premium, universal life account value, policy loan or surrender value from the above-mentioned policy. If yes, such conditions will be considered as "Policy Replacement".

☐ 是 Yes

☐ 尚未決定 Not Yet Decided

☐ 否 No

☐ 不適用(適用於過去 12 個月內並沒有購買新的人壽保險保單) Not applicable (Applicable to those who have not purchased a new life insurance policy in the past 12 months)

注意 Note：

「轉保」可能令閣下帶來實質及潛在損失。為保障閣下的權益，請仔細比較現有保單與新保單的條款，衡量轉保是否符合本身的最佳利益，閣下應尋求專業意見以了解相關風險及轉保的不利後果，並細閱本公司的網站 www.chinalife.com.hk 的壽險轉保須知以了解有關詳情。You may suffer loss in case of "Policy Replacement". To protect your interest, you should carefully consider your existing and the new insurance policies and assess whether the Policy Replacement is in your best interests before making a decision. You should seek professional advice to understand the associated risks and potential disadvantages of Policy Replacement. For details, please visit our website at www.chinalife.com.hk to view the useful tips on Life Insurance Policy Replacement.

第七部份 聲明及授權 Part 7 Declaration and Authorization

本人/我們現申請辦理上述之申請事項，謹此聲明並確認所有提供之資料及細節是準確無誤，真實及為事實之全部，並且是盡本人/我們所知及所信而作答的並沒有就上述之申請事項隱瞞任何重要資料。本人/我們並同意此等服務必須符合下列所有條件及經貴公司批准，方能生效：

1. 所有需要之文件已提交予貴公司並完整無缺。
2. 此項申請在受保人在生並仍然符合受保條件時，經貴公司接納及批准。
3. 在此表格及貴公司所須之其他文件上填報之一切資料及申報，將成為此保單之一部份(除非另有其他指示)。
4. 本人/我們明白所有保單利益之款項將根據保單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，就非港元保單提供選擇以港元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，如本人/我們選擇以非保單貨幣支付，本人/我們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。
5. 本人/我們提供符合貴公司要求之有效證明文件(例如身份證明文件及地址證明)予貴公司，讓貴公司能按照於「打擊洗錢及恐怖分子資金籌集條例」第 615 章所載，對本人/我們、保單之最終實益擁有人(如有)及本人/我們之授權簽署人士(如適用)進行客戶盡職審查。

I/We hereby request that the above application be effected and declare that all statements, information and particulars given herein are accurate, true and complete and are given to the best of my/our knowledge and belief and no material information has been withheld in relation to this request. I/We agree that such service(s) will not take effect unless all of the following conditions are met and approved by the Company:

1. All required complete supporting documents have been submitted to the Company.
2. The request is accepted and approved by the Company during the lifetime and continued insurability of the Insured.
3. The information and statement made in this request and in other documents as required by the Company shall form the basis for this policy alteration request and form a part of the policy(ies) unless otherwise specified.
4. I/We understand that any benefits payable under the Policy will be paid in the latest policy currency as shown on the Policy or, if applicable, the appropriate subsequent endorsement. Accordingly, the provision of the option to receive any such benefits in HKD for non-HKD policy is solely a service offered by the Company at its discretion. I/We understand and agree that should I/we opt for payment of any benefits payable under the Policy in non-policy 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.
5. I/We provide valid documentation proofs (such as identity document and address proof) to the satisfaction of the Company for the Company to conduct due diligence on myself/ourselves, the ultimate beneficial owner(s) of the policy (if any) and my/our authorized signatory(ies) (if applicable) pursuant to the Anti-money Laundering and Counter-Terrorist Financing Ordinance, Cap. 615.

第八部份 個人資料收集聲明 Part 8 Personal Information Collection Statement

本人/我們確認已閱讀及明白「中國人壽保險(海外)股份有限公司」的收集個人資料聲明。有關最新版本的收集個人資料聲明，可於 www.chinalife.com.hk 下載或向中國人壽保險(海外)股份有限公司索取。I/We confirm that I/we have read and understood the Personal Information Collection Statement (PICS) of China Life Insurance (Overseas) Company Limited. For the latest version of the PICS, it can be downloaded from www.chinalife.com.hk or is made available upon request.

保單號碼 Policy No.										

第九部份 收取個人壽險保費徵費聲明 Part 9 Declaration for Collection of Premium Levy on Individual Life Insurance Policies

本人/我們謹此確認 I/We hereby acknowledge that：

貴公司就保險業監管局要求並授權向每位保單持有人所持有的有效保單徵收「保費徵費」(下稱「徵費」)，及將收取的徵費將會全數轉交予該局。保險業監管局亦可以根據相關條例，將有關的欠付款作為民事債項及向相關的保單持有人追討欠款並有機會徵收罰款。有關收取徵費的詳情，請瀏覽中國人壽(海外)股份有限公司的網頁 www.chinalife.com.hk/levy。The Company is statutorily required to collect Premium Levy ("Levy") from Policyholder on behalf of the Insurance Authority ("IA") and the collected levy will be fully remitted to IA. IA may take legal proceedings against Policyholder in respect of any outstanding Levy as civil debt and may impose pecuniary penalty. For details of the collection of Levy, please refer to the website at www.chinalife.com.hk/levy.

第十部份 聲明及簽署(請勿在空白或尚未填妥的表格上簽署) Part 10 Declarations & Signature (Please DO NOT sign on BLANK or INCOMPLETE form)

1. 此表格必須於保單持有人簽署日起計30天內交至本公司。This form must be received by the Company within 30 days from the date of its signing.
2. 保單持有人、受讓人(如適用)及不可撤換受益人(如適用)的簽名式樣必須與本公司的記錄相符。The signatures of the Policyholder, Assignee (if applicable) and Irrevocable Beneficiary (if applicable) must match with the Company's record.
3. 若保單持有人以圖章蓋印簽署，必須有一位見證人。見證人之個人資料只會用於處理此申請及確認此表格簽署人的身份之用。If the Policyholder uses a signature chop, a witness is required. The personal particulars of the witness will only be used for the purpose of verification and confirmation of the identity of the signatory of this form.

本人/我們僅此確認已閱讀及明白以上申請的所有條款及條件，並同意受該等條款及條件約束。本人/我們僅此同意作出以上協議及聲明。

I/We hereby confirm that I/we have read and understood all the terms and conditions of the above request, and agree to be bound by the same. I/We hereby agree to make the above agreements and declarations.

保單持有人簽署及印鑑(如適用) Signature and Stamp (if applicable) of Policyholder	受讓人/不可撤換受益人簽署及印鑑(如適用) Signature and Stamp (if applicable) of Assignee / Irrevocable Beneficiary	見證人簽署(如適用) Signature of Witness (if applicable)
		與保單持有人之關係 Relationship to Policyholder
		☐ 保險中介人/銀行職員/客戶服務中心職員 Insurance Intermediary/Bank Staff/CS Centre Staff 編號 Code ______ ☐ 其他人士(請註明) Others (Please Specify) ______ 身份證明文件號碼 Identity Document No.
姓名/名稱 Name	姓名/名稱 Name	姓名 Name
日期 (年/月/日) Date (YYYY/MM/DD)	日期 (年/月/日) Date (YYYY/MM/DD)	日期 (年/月/日) Date (YYYY/MM/DD)

保單號碼 Policy No.										

所需文件指引 Documents Checklist

客戶類別 Customer Type	服務申請類別 Type of service request	所需文件(請✓閣下已提交的文件) Documents Required (Please ✓ against the documents you submitted) 保單持有人/不可撤換受益人(如適用) Policyholder / Irrevocable Beneficiary(if applicable)	受讓人(如適用) Assignee (if applicable)
個人客戶 Individual Customer	保單價值提取/保單貸款/終止保單 Policy Value Withdrawal/ Policy Loan/Policy Termination	☐ 身份證明文件的核實副本(如未曾遞交) Certified True Copy of Identification Proof (If not submitted) ☐ 載有銀行賬戶持有人姓名及賬戶號碼的銀行存摺 / 銀行卡 / 最近 3 個月內發出的月結單(包括電子結單) / 其他有效銀行賬戶證明副本 (如選用轉賬或電匯為付款方式) Copy of bank book / bank card / bank statement which is issued within the past 3 months (including e-statement) / other valid account proof showing the bank account holder's name and account no.. (If select bank transfer or telegraphic transfer as payment method) ☐ 《自我證明表格 – 個人 (保單服務適用)》 (如有任何稅務地區變更) "Self-Certification Form – Individual (For Policy Service Use)" (If there is any change of the tax residence)	☐ 《自我證明表格 – 實體 (保單服務適用)》，或《自我證明表格 – 個人 (保單服務適用)》(如有任何稅務地區變更) "Self-Certification Form – Entity (For Policy Service Use)", or "Self-Certification Form – Individual (For Policy Service Use)" (If there is any change of the tax residence)
	償還保單貸款 Policy Loan Repayment	☐ 繳款證明 Payment Proof	
公司客戶 Corporate Customer	保單價值提取/保單貸款/終止保單 Policy Value Withdrawal/ Policy Loan/Policy Termination	☐ 公司查冊文件及其他公司文件，詳情請參閱本公司網站 www.chinalife.com.hk (服務 > 網上自助服務及表格下載 > 繳付及領取 > 提取保單款項) 之《保單領款須知(適用於保單持有人為實體/機構)》 Company search document and other company documents, please visit our website www.chinalife.com.hk (Service > E Self-Service and Form Library > Payment & Collection > Request For Policy Value Withdrawal) for information on "Policy Payment Application Guidance Notes (Applicable to Entity Policyholder)" ☐ 載有銀行賬戶持有人姓名及賬戶號碼的銀行存摺 / 銀行卡 / 最近 3 個月內發出的月結單(包括電子結單) / 其他有效銀行賬戶證明副本 (如選用轉賬或電匯為付款方式) Copy of bank book / bank card / bank statement which is issued within the past 3 months (including e-statement) / other valid account proof showing the bank account holder's name and account no.. (If select bank transfer or telegraphic transfer as payment method) ☐ 《自我證明表格 – 實體 (保單服務適用)》(如有任何稅務地區變更) "Self-Certification Form – Entity (For Policy Service Use)" (If there is any change of the tax residence)	☐ 公司查冊文件及其他公司文件，詳情請參閱本公司網站 www.chinalife.com.hk (服務 > 網上自助服務及表格下載 > 繳付及領取 > 提取保單款項) 之《保單領款須知(適用於保單持有人為實體/機構)》 Company search document and other company documents, please visit our website www.chinalife.com.hk (Service > E Self-Service and Form Library > Payment & Collection > Request For Policy Value Withdrawal) for information on "Policy Payment Application Guidance Notes (Applicable to Entity Policyholder)" ☐ 《自我證明表格 – 實體 (保單服務適用)》 (如有任何稅務地區變更) "Self-Certification Form – Entity (For Policy Service Use)" (If there is any change of the tax residence)
	償還保單貸款 Policy Loan Repayment	☐ 繳款證明 Payment Proof	