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## 委任/更改/終止指定保單暫託人申請表 – 適用於設有保單暫託人條款之產品 Application Form for Appointment / Change / Termination of Designated Interim Policyholder – Applicable To Products That Have Interim Policyholder's Clause

保單持有人姓名 Name of Policyholder	受保人姓名 Name of Insured	保單號碼 Policy No.
<input type="text"/>	<input type="text"/>	<input type="text"/>

### 保險中介人資料 INSURANCE INTERMEDIARY'S INFORMATION

保險中介人姓名 Name of Insurance Intermediary	
<input type="text"/>	
保險中介人編號 Insurance Intermediary's Code	聯絡電話 Contact No.
<input type="text"/>	<input type="text"/>

### 重要須知 IMPORTANT NOTE

1. 本申請表中所用之「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.
2. 本申請表應由保單持有人以正楷填寫及簽名,簽名式樣須與本公司的記錄相符。保單持有人亦必須於此申請表內任何曾修改的地方簽署作實。This form is to be completed by the Policyholder in BLOCK LETTERS and signed with the signature correspond with the Company's record. Any amendments in this form must be countersigned by the Policyholder in full signature.
3. 保險中介人或銀行職員收到本申請表並不代表本公司亦已收妥。Receipt of this form by Insurance Intermediary or Bank Staff does not constitute receipt by the Company.
4. 請將填妥及簽署的申請表正本於簽署此申請表的 30 天內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 completed and duly signed form(s) and the required document(s) to "China Life Insurance (Overseas) Co.Ltd.", 24/F, CLI Building, 313 Hennessy Road, Wan Chai, Hong Kong within 30 days after signing this form.
5. 本公司有權隨時更新本申請表,並接受或拒絕未符合本公司要求的申請表。請登入本公司網站 [www.chinalife.com.hk](http://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 to reject the form if the Company's requirements are not fulfilled. Please visit our website [www.chinalife.com.hk](http://www.chinalife.com.hk) to view and download the latest version of the form.
6. 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).

### 第一部份 委任/更改/終止指定保單暫託人注意事項 Part 1 Important Notes of Appointment / Change / Termination of Designated Interim Policyholder

#### 備註 Notes:

1. 委任指定保單暫託人,他/她必須為個人及年滿 18 歲或以上,及必須在受保人年滿 18 歲前提出申請;  
To designate the Designated Interim Policyholder, he/she must be an individual and attained the age of 18 or above, and the application must be made before the Insured attains the age of 18;
2. 只可以委任一名指定保單暫託人,並須經本公司批核後方可生效。本公司擁有批准或拒絕指定保單暫託人委任的唯一且絕對決定權;  
Only one Designated Interim Policyholder may be appointed. The appointment of the Designated Interim Policyholder is not completed until the application is approved by the Company to be effective. The Company shall have the sole and absolute discretion to approve or decline the appointment of the Designated Interim Policyholder;
3. 保單持有人提交申請後,須告知指定保單暫託人其相關義務(包括但不限於保費繳納)。指定保單暫託人應仔細研究保單條款,並自行獨立評估其履行保費支付義務及保單其他義務的能力;  
Once the application is submitted, the Policyholder shall inform the Designated Interim Policyholder of their obligations (including but not limited to the Premium payment), and the Designated Interim Policyholder shall study the terms and conditions of the Policy and make their own independent assessment on their ability to meet Premium payment obligations and other obligations under the Policy;
4. 此申請只適用於合資格產品及不適用於以下保單:  
a)保單持有人為法人團體、b)保單持有人為聯合持有人、c)已抵押轉讓予受讓人、d)已指定不可撤換受益人、e)已委任臨時受託人的兒童保單;  
This application is only applicable to eligible products and **NOT** applicable if:  
a)the Policyholder is a body corporate, b)there is more than one Policyholders, c)the Policy is subject to an assignment, d)the Policyholder has designated an irrevocable beneficiary, e)Juvenile policy is under interim trust arrangement;
5. 當保單持有人身故時,若保單仍然有效且受保人未滿 18 歲,指定保單暫託人須於保單持有人身故後九十(90)日內向本公司提出申請,在符合適用的法律法規及本公司的相關行政規則及程序前提下,經本公司批核後安排成為保單暫託人。本公司有權根據其獨立且絕對的判斷,要求提供額外信息或文件,和/或對該申請提出進一步要求;  
Upon the death of the Policyholder and while the Policy is in force, provided that the Insured is below the age of 18, subject to the fulfilment of the Company's related administrative rules and procedures, and satisfaction of applicable laws and regulations, the Designated Interim Policyholder shall submit an application for Interim Policyholder within 90 days after the death of the Policyholder to become the Interim Policyholder of the Policy. The Company shall have the right to request for additional information or documents and/or impose further requirements for such application in a manner as determined by the Company in its sole and absolute discretion;



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**第一部份 委任/更改/終止指定保單暫託人注意事項(續) Part 1 Important Notes of Appointment / Change / Termination of Designated Interim Policyholder (Continued)**

6. 倘若因任何原因導致本公司無法安排指定保單暫託人成為保單暫託人，則保單擁有權將歸屬於已故保單持有人遺產；  
If the Company is unable to arrange the Designated Interim Policyholder to become the Interim Policyholder due to any reasons, the ownership of this Policy will be the deceased Policyholder's estate;
7. 在成為保單暫託人後，他/她將承擔受限制權利直至受保人年滿 18 歲為止。受限制權利包括但不限於指：a)更改保單暫託人的通訊地址或聯絡電話；b)申請保單副本；c)申請保單復效；d)更改保費的繳費方式；e)查詢保單狀態；f)支付保費；及 g)償還保單貸款或自動保費貸款（統稱為“受限制權利”）；  
After becoming the Interim Policyholder, he/she shall only be restricted to exercise restricted rights until the Insured attains the age of 18. Such rights include but not limited to: a) change of correspondence address or contact number of Interim Policyholder; b) application for a copy of Policy; c) application for Policy reinstatement; d) change of Premium payment method; e) enquiry of Policy status; f) Premium payments; and g) Policy Loan or Automatic Premium Loan repayments (collectively, "Restricted Rights");
8. 在成為保單暫託人後，他/她受限於只可行使受限制權利及並未獲授權對本保單行使下列之任何變更，而列表並非詳細無遺：a)本保單下任何相關人士的更改，包括但不限於保單持有人、受保人及受益人；b)保單價值的更改，包括但不限於提取任何保單存款和任何現金價值，行使保單分拆權益及申請保單貸款；c)保單轉讓及 d)申請終止及/或退保本保單；  
After becoming the Interim Policyholder, he/she shall only be authorized to exercise the Restricted Rights and is not authorized to exercise any of the following non-exhaustive list of changes to the Policy: a) change of any concerned person(s) named under the Policy, including but not limited to Policyholder, Insured and Beneficiary; b) change in Policy value, including but not limited to withdrawal of any Policy Deposit or any Cash Value, exercise of Policy split option and applying for Policy Loan; c) assignment of the Policy; and d) application to terminate and/or surrender the Policy;
9. 在成為保單暫託人後，保單權益將於受保人達到 18 歲時歸於受保人，保單暫託人將終止而受限於本公司的相關行政規則及程序及符合適用的法律和法規，本公司將安排受保人成為保單持有人；於受保人年齡達到 18 歲前，保單暫託人應通知受保人成為本保單的保單持有人的權利及義務；  
After becoming the Interim Policyholder, when the Insured attains the age of 18, subject to the Company's related administrative rules and procedures and satisfaction of applicable laws and regulations, the Company will arrange the Insured to become the Policyholder, and the role of Interim Policyholder will terminate; Before the Insured reaches the attained age of 18, the Interim Policyholder shall inform the Insured of his/her rights and obligations to become the Policyholder of the Policy;
10. 當受保人年滿 18 歲及當時的保單持有人仍在世，指定保單暫託人將自動撤銷；  
When the Insured attains the age of 18 and the Policyholder is still alive, the Designated Interim Policyholder will be automatically revoked.
11. 保單持有人不能在同一份保單同時委任指定保單暫託人及後備保單持有人及/或後補受保人。指定後備保單持有人及/或後補受保人會自動撤銷之前指定保單暫託人，同樣地，委任指定保單暫託人亦會自動撤銷之前所指定的後備保單持有人及/或後補受保人；  
The Policyholder cannot designate a Designated Interim Policyholder and Contingent Policyholder and/or Contingent Insured at the same time under the same Policy; The appointment of Contingent Policyholder and/or Contingent Insured under this Policy will automatically revoke any previous designation of Designated Interim Policyholder. Similarly, the designation of Designated Interim Policyholder will automatically revoke previous appointment of Contingent Policyholder and/or Contingent Insured;
12. 當本公司發出確認信確認下列申請後或發生下列任何一項事件時，保單的指定保單暫託人將會被自動撤銷：a)若指定保單暫託人身身故早於保單持有人，而受保人仍然未滿 18 歲，或 b)保單持有人轉換受保人，或 c)保單抵押轉讓申請。保單持有人可在保單仍然生效時重新指定新的指定保單暫託人；若沒有再指定新的在世指定保單暫託人，一旦保單持有人過世，根據本保單條款和條件，保單權益仍歸屬於保單持有人遺產；  
When the Company issues a confirmation letter to confirm the following application or the occurrence of any of the following events, the Designated Interim Policyholder under this Policy will be revoked automatically if: a) the Designated Interim Policyholder pre-deceases the Policyholder while the Insured is below the age of 18, or b) Policyholder has submitted a subsequent application for change of Insured, or c) the Policyholder has submitted an application for Policy assignment. While the Policy is still in force, the Policyholder may re-designate a new Designated Interim Policyholder. In the absence of any new Designated Interim Policyholder alive at the time of the death of the Policyholder, subject to the terms and conditions of the Policy, the ownership of this Policy will belong to the deceased Policyholder's estate;
13. 指定保單暫託人可提供書面確認表示不願意成為本保單的指定保單暫託人；  
The Designated Interim Policyholder can provide the Company with written notice of his unwillingness to become the Designated Interim Policyholder of this Policy;
14. 當更改保單持有人時，任何指定保單暫託人/後備保單持有人/後補受保人/受益人(不可撤換受益人除外)將自動撤銷，保單持有人可在保單仍然生效時重新委任新的指定保單暫託人/後備保單持有人/後補受保人/受益人，惟須符合本公司的相關行政程序及經本公司確認及發出的確認信方作實。  
Upon change of the Policyholder, any Designated Interim Policyholder/Contingent Policyholder/Contingent Insured/Beneficiaries (except irrevocable beneficiary) appointed under this Policy will be revoked automatically. While the Policy is in force, the Policyholder may re-designate any Designated Interim Policyholder / Contingent Policyholder/ Contingent Insured /Beneficiaries subject to fulfillment of the Company's related administrative rules and procedure and approval by the Company by issuance of confirmation letter.
15. 本公司並無責任承擔任何義務，亦無責任核實或負責任何指定保單暫託人之有效性或合法性。本公司不應承擔或被視為承擔與指定保單暫託人委任相關的任何責任或義務。  
The Company shall not be responsible to assume any duty or be responsible to verify, or be responsible for the validity or legality of any designation of the Designated Interim Policyholder. The Company shall not assume or be regarded to assume any responsibility or liability in relation to the appointment of Designated Interim Policyholder.
16. 保單持有人保證並聲明，該指定保單暫託人具備能力及資格擔任本保單的保單暫託人。  
The Policyholder warrants and represents that the Designated Interim Policyholder is capable and eligible to act as the Interim Policyholder of this Policy.
17. 保單持有人確認並同意，本指定保單暫託人申請中的任何內容均不得解釋為設立或意圖設立信託、受託關係或類似法律安排。根據本申請委任指定保單暫託人，並沒有意圖產生受託人或受益人的任何職責、義務或權利。  
The Policyholder acknowledges and agrees that nothing herein contained in this application for Designation of Interim Policyholder shall be construed as creating or intending to create a trust, fiduciary relationship, or similar legal arrangement. No duties, obligations or rights of a trustee or beneficiary are intended to arise by virtue of the appointment of Designated Interim Policyholder under this application.

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**第一部份 委任/更改/終止指定保單暫託人注意事項(續) Part 1 Important Notes of Appointment / Change / Termination of Designated Interim Policyholder (Continued)**

18. 就指定保單暫託人的委任發生爭議，本公司將視之為爭議事件，並保留暫停指定保單暫託人或後備保單持有人（視情況而定）委任的權利，直至該爭議通過法律途徑解決。對於因該爭議、暫停及/或指定保單暫託人而產生的任何損失、損害及/或費用，本公司概不負責。
- In the event of a dispute in regards to the appointment of Designated Interim Policyholder, the Company shall treat this as a dispute and the Company reserves the right to suspend the appointment of Designated Interim Policyholder or Interim Policyholder (as the case may be) until such dispute is legally resolved. The Company shall not be liable for any loss, damages and/or costs incurred arising out of such dispute, the suspension and/or appointment of such Designated Interim Policyholder.

**第二部分 指定保單暫託人委任/更改/終止指定保單暫託人 Part 2 Appointment / Change / Termination of Designated Interim Policyholder**

- 委任 / 更改指定保單暫託人 (請填寫第三部份) Appointment / Change of Designated Interim Policyholder (Please complete Part 3)
- 終止指定保單暫託人 Termination of Designated Interim Policyholder

**第三部份 指定保單暫託人資料 Part 3 Information of Designated Interim Policyholder**

中文姓名 Name in Chinese	英文姓名 Name in English	性別 Sex	出生日期 Date of Birth			身份證明文件號碼 Identity Document No.
			年 Year	月 Month	日 Day	
與保單持有人之關係 Relationship with Policyholder	<input type="checkbox"/> 配偶 Spouse <input type="checkbox"/> 父母 Parent <input type="checkbox"/> 祖父母/外祖父母 Grandparent					
	<input type="checkbox"/> 子女 Children <input type="checkbox"/> 兄弟姐妹 Sibling <input type="checkbox"/> 孫/外孫 Grandchildren					
	<input type="checkbox"/> 其他 Other (請註明 Please specify: _____)					

**第四部份 個人資料收集聲明 Part 4 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](http://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 Personal Information Collection Statement ("PICS") of China Life Insurance (Overseas) Company Limited. For the latest version of PICS, it can be downloaded from [www.chinalife.com.hk](http://www.chinalife.com.hk) or is made available upon request.

**第五部份 聲明 Part 5 DECLARATIONS**

本人 / 我們僅此確認已閱讀及明白以上申請內的所有內容、條款及條件並同意受該等內容、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 content, terms and conditions of the above request, and agree to be bound by those content, terms and conditions. I/We hereby agree to make the above agreements and declarations.

**第六部份 簽署 Part 6 Signature**

- 本申請表必須於保單持有人簽署日起計 30 天內交至本公司辦理手續。This form must be received by the Company within 30 days after the Policyholder signing this form.
- 若保單持有人以圖章蓋印簽署，必須有一位見證人，見證人必須為年滿 18 歲或以上的第三者。見證人之個人資料只會用於處理本申請及確認本申請表簽署人的身份之用。If the Policyholder or Insured uses a signature chop, a witness is required. The witness must be an individual third party aged 18 or above. 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.
- 請勿在空白申請表上簽署。Please DO NOT sign on BLANK form.

	保單持有人 Policyholder			見證人 Witness (if applicable)		
簽署或印鑑 Signature and/or Chop						
姓名 Name						
身份證明文件號碼 Identity Document No.						
日期 Date	年 Year	月 Month	日 Day	年 Year	月 Month	日 Day