



保單號碼 Policy No.

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**B. 合資格延期年金保單領款方式變更 Change of Qualifying Deferred Annuity Policy Payment Options**

保單價值類別 Type of Policy Value	領款方式 Payment option
保證每月年金入息 及 非保證每月年金入息 Guaranteed Monthly Annuity Income and Non-guaranteed Monthly Annuity Income	<input type="checkbox"/> 提取現金 Cash payment <input type="checkbox"/> 積存生息 Accumulation with Interest

**A. 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<sup>^</sup> Policy Currency       港元 HKD
**注意 Note :**

- 當「提取現金」申請生效後, 該/該等保單賬戶內的所有累積款項會即時被全數領取。ALL accumulated amount in the related policy account/accounts will be withdrawal immediately when the change of Cash Payment effective.
- 如選擇領款方式為「抵付保費」, 抵付保費會同時繳付保費及保費徵費。本申請及日後需要更改領款方式均必須在保單的下一個繳費日前的十四 (14)個工作天遞交。If the payment option is Premium Payment, the Levy has been included into the Premium Payment. If you would like to change to another payment option, please submit the application form 14 working days prior to the next paid to date.
- 本公司接納申請後在任何情況下均不可以取消申請及還原領取款項至保單內。如領取方式非積存生息, 保單的長遠價值將會受到影響。詳情請參閱保單條款, 請仔細考慮此舉是否符合您的最佳利益和財務需要。Once the application is approved by the company, it cannot be cancelled or reversed under any circumstances, and the withdrawn funds cannot be reinstated to the policy. If the payment method is not by Accumulation with Interest, the long term value of the policy may be affected. Please refer to the policy provision for details, and carefully consider whether the application is in your best interests and can meet your financial needs.
- 倘保單尚未登記「預設收款賬戶」, 更改給付方式為「現金領取」時, 請同時填寫本申請表第二部份「更改預設收款賬戶」。Please also complete the Change of Default Payment Account ( Part 2 of this application form ) when "Cash Payment" is selected as the payment option.

**第二部份 更改預設收款賬戶 Part 2 Change of Default Payment Account**

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.
	<input type="text"/>	<input type="text"/>	<input type="text"/>

**注意 Note :**

- 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.
- 只接受保單持有人本人於香港銀行設立的銀行賬戶為「預設收款賬戶」。Only accept bank account opened in Hong Kong by the policyholder as the "Default Payment Account".
- 新增或更改預設收款賬戶須遞交銀行賬戶證明文件 ( 收款賬戶為港元/人民幣除外 ) , 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。Adding or changing the Default Payment Account requires the submission of bank account proof (Except for Payment Account in HKD/CNY), which must clearly display the account holder's name, and account number; unrelated content can be masked.
- 保單持有人須確保所登記的「預設收款賬戶」支援保單貨幣或所選貨幣以作日後領取保單價值或利益之用。The policyholder must ensure that the registered "Default Payment Account" supports the policy currency or selected currency for the purpose of receiving future policy values or benefits.
- 當「預設收款賬戶」被成功登記後, 保單日後的各類保單領款及賠付 ( 包括但不限於退回多繳款項、保單價值提取、保單退保、保單期滿利益領取、理賠 ) 將會被支付至「預設收款賬戶」( 除非另有指明 ) 。惟倘保單已成功登記保單期滿利益預申請, 期滿利益將以該登記指示作出給付。Once the "Default Payment Account" is successfully registered, policy and claims payments of the policy(ies) (such as premium refund, policy value withdrawal, policy surrender, policy maturity benefits, claims) will be paid to the "Default Payment Account" (unless otherwise specific). However, if the policy has successfully registered for the pre-application of Policy Maturity Benefit, the maturity benefit will be paid according to the registered instruction.
- 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.
- 如「預設收款賬戶」幣種與領取保單利益申請所選的支付貨幣不一致, 保單持有人須自行承擔銀行匯率變動衍生之風險、貨幣兌換時所產生的匯兌損益(如有)及相關的銀行手續費(如適用)。If the currency of "Default Payment Account" is not the same as the selected payment currency, the policyholder has to bear for any potential exchange rate risks, associated gain or loss (if any) due to the currency exchange and related bank charge from their bank; or the payment may be rejected.
- 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.
- 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, 而付款貨幣為港元、人民幣及美元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。如選擇上述以外的付款貨幣, 保單持有人須重新提交付款指示。If there is insufficient information to confirm that the bank account holder is the policyholder, or the payment cannot be credited for any reason, payments in HKD, CNY and USD will be paid by a crossed cheque instead. The processing time for cheque issuance will be longer compared to bank transfer. If a payment currency other than the above is selected, the policyholder must resubmit the payment instruction.
- 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 CNY as the payment currency, even if the payment

**第三部份 聲明及授權 Part 3 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 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](http://www.chinalife.com.hk) or is made available upon request.

**第五部份 收取個人壽險保費徵費聲明 Part 5 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](http://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](http://www.chinalife.com.hk/levy).

**第六部份 聲明及簽署(請勿在空白或尚未填妥的表格上簽署) Part 6 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, Insured (if applicable), 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)
姓名/名稱 Name	姓名/名稱 Name	與保單持有人簽署之關係 Relationship to Policyholder
日期 (年/月/日) Date (YYYY/MM/DD)	日期 (年/月/日) Date (YYYY/MM/DD)	<input type="checkbox"/> 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 _____
		<input type="checkbox"/> 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
		日期 (年/月/日) Date (YYYY/MM/DD)

所需文件指引 Documents Checklist							
客戶類別 Customer Type	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) <span style="float: right;">受讓人(如適用) Assignee (if applicable)</span>						
個人客戶 Individual Customer	<table border="1" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> 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)                         </td> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> 《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)                         </td> </tr> <tr> <td style="vertical-align: top;"> <input type="checkbox"/> 如選用本地銀行轉賬非港元/人民幣或電匯至海外銀行戶口為付款方式：載有銀行賬戶持有人姓名及賬戶號碼的銀行存摺 / 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)                              For choosing payment by non-Hong Kong Dollar / CNY via local bank transfer or Telegraphic Transfer to Overseas Bank Account: A copy of bank book / 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)                         </td> <td></td> </tr> <tr> <td style="vertical-align: top;"> <input type="checkbox"/> 《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)                         </td> <td></td> </tr> </table>	<input type="checkbox"/> 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)	<input type="checkbox"/> 《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)	<input type="checkbox"/> 如選用本地銀行轉賬非港元/人民幣或電匯至海外銀行戶口為付款方式：載有銀行賬戶持有人姓名及賬戶號碼的銀行存摺 / 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) For choosing payment by non-Hong Kong Dollar / CNY via local bank transfer or Telegraphic Transfer to Overseas Bank Account: A copy of bank book / 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)		<input type="checkbox"/> 《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)	
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