

Please read the following carefully before you retrieve, print or complete this form.  
在索取、列印或填寫表格前，請閣下先詳閱下文。

## Disclaimer

Any form downloaded/printed via any electronic media provided by Chow Tai Fook Life Insurance Company Limited (“CTF Life”) (e.g. corporate website, interactive voice response system) is done at your own discretion and risk. CTF Life is not responsible for any printing error that results from the form download/printing and any loss or damage howsoever caused as a result of such printing error. In the event that there is any printing error in the downloaded/printed form, CTF Life may require you to fill in a correct form before starting to process your application.

For forms downloaded from the Internet (the “Internet Printed Form”), upon completing and signing the Internet Printed Form, you shall be deemed to have read and understood the contents of the form displayed on computer screen (the “Displayed Form”) which shall prevail in case there is any inconsistency, contradiction or difference of whatever kind between the Displayed Form and the Internet Printed Form and have agreed to all provisions contained therein and to have agreed and undertaken not to raise any objection whatsoever in connection with any inconsistency, contradiction or difference of whatever kind between the Displayed Form and the Internet Printed Form.

CTF Life reserves the right to update the forms from time to time as it sees fit and also reserves the right to accept or reject the form submitted by you.

## 免責聲明

閣下凡透過周大福人壽保險有限公司 [周大福人壽] 之電子收發渠道 [如公司網站、互動語音回應系統] 下載或列印任何表格，應自行考慮及衡量需承擔之風險。周大福人壽概不負責任何因下載或列印表格所引致的列印錯誤及其可能導致之任何損失或毀壞。若閣下提交之下載或列印表格有任何列印錯誤，周大福人壽有可能在處理閣下的申請前要求閣下填寫一份正確之表格。

當閣下填寫及簽署由網站下載之表格 [互聯網列印表格]，則被視作閣下已詳閱及明白電腦螢幕上出現之表格 [閱覽表格] 之內容，並同意表格內之所有條文。如該閱覽表格與互聯網列印表格出現任何不符、矛盾或分歧時，閣下同意並承諾不會提出任何異議。如閱覽表格與互聯網列印表格出現任何不符、矛盾或分歧時，概以閱覽表格為準。

周大福人壽有權隨時在認為適當情況下更新表格內容，並保留接受或拒絕閣下遞交之申請表格的權利。



**(CTF Life Planner) Use eService to submit your policy service requests in a digital way!**

**(人生規劃師) 使用服務易以電子方式遞交您的保單服務申請！**



**(CTF Life Customer) Use “CTF Life” Customer App to submit your policy service requests in a digital way!**

**(周大福人壽客戶) 使用「周大福人壽」流動應用程式以電子方式遞交您的保單服務申請！**

投資相連保險保費更改服務申請書  
Change of Investment Choice Basic Premium Service Request Form

保單號碼 Policy Number	<input type="text"/>	保險代理人姓名 Name of Insurance Agent	<input type="text"/>
保單持有人姓名 Name of Policy Owner	<input type="text"/>	保險代理人編號 Insurance Agent Code	<input type="text"/>
受保人姓名 Name of Insured	<input type="text"/>	保險代理人電話號碼 Insurance Agent Telephone No.	<input type="text"/>

本人/我們現要求周大福人壽保險有限公司(「周大福人壽」)處理以下的申請。/We hereby request Chow Tai Fook Life Insurance Company Limited ("CTF Life") to proceed the following change request.

請在適當位置加上“√”剔號及刪除所有不適用者。Please tick “√” where appropriate and delete whichever is inappropriate.

<input type="checkbox"/> 1. 基本保費 Basic Premium <input type="checkbox"/> 更改基本保費 Change Basic Premium 新的每年基本保費為 New Annual Basic Premium is \$ _____ (以保單貨幣計算 Denominated in the Policy Currency)		<b>重要提示 Important Notes</b> 1. 基本保費須符合最低金額規定，請參閱以下的最低要求摘要。 Basic Premium shall fulfill the minimum amount requirement as listed below.
<input type="checkbox"/> 2. 更改繳費方式 Change of Payment Frequency <input type="checkbox"/> 年繳 Annually <input type="checkbox"/> 半年繳 Semi-Annually <input type="checkbox"/> 月繳 Monthly (請遞交填妥之直接付款授權書並預繳兩個月保費及保費徵費 Please submit a completed Direct Debit Authorization Form together with two months' premium and premium levy in advance)		
<input type="checkbox"/> 3. 附註 Remarks	連同此表格遞交的更改按金 Change deposit paid with this from	港元 HKD

**最低要求摘要 Minimum Requirements:**

最低規定 Minimum Requirement	基本保費 / 定期保費 Basic Premium / Regular Premium		
	年繳 Annual	半年繳 Semi-Annual	月繳 Monthly
領航 Aviator	不適用 N/A		
領航之選 Aviator Plus			
盈晉之選 Legend			
「盈進」投資 "Wealth Accumulator"			
「盈進」智選投資 "Wealth Accumulator" Plus			
「盈進保」投資 Wealth Builder	美元US\$125 / 港元HK\$1,000	美元US\$125 / 港元HK\$1,000	美元US\$19 / 港元HK\$150
「盈智」投資 "Wealth Smart"	美元US\$1,800	美元US\$900	美元US\$150
「盈智」智選投資 "Wealth Smart" Plus	美元US\$1,800	美元US\$900	美元US\$150
「盈智」卓裕投資 "Wealth Smart" Premier	美元US\$1,800	美元US\$900	美元US\$150
盈匯 Wealth Partner	美元US\$1,200 / 港元HK\$9,600	美元US\$600 / 港元HK\$4,800	美元US\$100 / 港元HK\$800
閃耀人生 Oscar	美元US\$1,200 / 港元HK\$9,600	美元US\$600 / 港元HK\$4,800	美元US\$100 / 港元HK\$800

\* L S O 1 9 9 0 2 \*

2604

**個人資料收集聲明 Personal Information Collection Statement**

本人 / 我們確認本人 / 我們已閱讀及明白周大福人壽保險有限公司（以下簡稱“周大福人壽”）之個人資料收集聲明（“該聲明”）。本人 / 我們聲明及同意貴公司可根據該聲明所述之任何目的收集及 / 或持有、使用及/或披露/分享任何個人資料（不論是否從此表格或以其他方式獲得）。本人 / 我們明白本人 / 我們必須於此表格提供所須資料，否則貴公司將可能無法執行該聲明之目的及 / 或向本人 / 我們提供產品或服務。本人 / 我們確認及同意本人 / 我們的個人資料可能披露/共享給該聲明所指明的第三方; 執法機構; 保險業就現有資料而對所提供的資料作出分析和檢查而使用的數據庫或登記冊作出於該聲明所述之任何目的。本人/我們明白該聲明的最新版本可於周大福人壽的網址下載：[www.ctflife.com.hk](http://www.ctflife.com.hk)，及可向貴公司索取。

I /We confirm that I/we have read and understood Chow Tai Fook Life Insurance Company Limited (“CTF Life”)’s Personal Information Collection Statement (“PICS”). I/We declare and agree that any personal data CTF Life may collect and/or hold, use and/or disclose/ share with (whether contained in this form or otherwise obtained) in accordance with the Purposes as set out in the PICS. I/We understand that if I/we do not provide the required personal data, CTF Life may not be able to perform the Purposes and/or provide products or services to me/us. I/We acknowledge and agree that my/our personal data may be disclosed/shared with specified parties in the PICS; law enforcement authorities; databases or registers used by the insurance industry to analyse and check information provided against existing information for any of the Purposes stated in the PICS. I/We understand the updated version of the PICS is available for download from CTF Life’s website: [www.ctflife.com.hk](http://www.ctflife.com.hk), and will be made available upon request.

**聲明及授權 Declaration and Authorization**

本人 / 我們明白上述申請事項得到周大福人壽批准後，將於批核日或於本公司特別註明生效日期起生效。

本人 / 我們明白投資附帶風險及投資價格可升可跌，亦明白貴公司會在合理時間內處理以上申請，貴公司毋須對延遲辦理而招致的任何直接、間接、特別或相應損失或損害承擔責任。

本人 / 我們明白若保單貨幣跟選擇帳戶之貨幣不同，由周大福人壽作出的一切付款將按周大福人壽不時釐定之貨幣兌換率轉為保單貨幣。因此，本人 我們明白本人/我們所收之實際款項將與說明文件所顯示的或有所差別。

本人 / 我們明白若此表格的中、英文兩個版本有任何抵觸或不相符之處，應以英文版本為準。

I/We understand that the request shall take effect on the approval date of this application or a later date as specified subject to the approval of CTF Life.

I/We understand investment involves risk and the value of investment may go down as well as up. Also, I/we understand that CTF Life will handle my request within reasonable time and shall not be liable for any direct, indirect, special or consequential loss or damages arising from such delay.

I/We understand if the policy currency is different from the currency of selected accounts, all monies payable by CTF Life will be converted to the policy currency at the exchange rate quoted by CTF Life from time to time. Therefore, I/we understand the actual payment that I/we receive may be different from those illustrated in the illustration.

I/We understand that if there is any inconsistency or ambiguity between the English version and the Chinese version of this form, the English version should prevail.

X _____ 保單持有人/受讓人簽署 Signature of Policy Owner/Assignee	X _____ 簽署日期 (日/月/年) Date of Signature (DD/MM/YY)	X _____ 見證人/保險代理人簽署 Signature of Witness/Insurance Agent	X _____ 簽署日期 (日/月/年) Date of Signature (DD/MM/YY)
		見證人/保險代理人姓名 ( ) Name of the Witness/Insurance Agent	

\* 簽署式樣須與投保書或本公司的最後之紀錄相同 Signature must be consistent with that on the application form or Company’s latest record



**中華人民共和國附錄（“本附錄”）**  
**The People's Republic of China Addendum (this “Addendum”)**

本聲明可能會不時更新，以反映我們因應個人資料保護和/或個人資料/數據私隱法律和法規變化而產生的政策變更。如有重大變更，我們將通知您並徵得您對變更、同意和/或選擇（必要或適用時）的許可。如果您不接受變更和/或提供您的許可，那麼我們可能無法執行目的和/或向您提供商品與服務。我們建議您定期查看應用程式和/或網站（視情況而定）以獲取本聲明的更新版本。

This Statement may be updated from time to time to reflect changes to our policy with respect to personal data protection and/or changes to personal data/data privacy laws and regulations. Where there are significant changes, we will notify you and obtain your acceptance of the changes, consents, and/or opt in (as necessary or applicable). If you do not accept the changes and/or provide your consent, then we may not be able to perform the Purposes and/or provide goods or services to you. You are advised to check the Application and/or the Website (as the case may be) for updates to this Statement on a regular basis.

本聲明中的任何內容均不限制您根據《私隱條例》所享有的權利。  
Nothing in this Statement shall limit your rights under the PDPO.

如果您是：

If you are:

- (i) 位於中國內地的個人，於中國內地訪問周大福人壽相關網站或使用周大福人壽相關流動應用程式或從中國內地通過手機或任何其他方式使用周大福人壽產品及/或服務；及/或  
an individual located in Mainland China who visits CTF Life's relevant website(s) or uses relevant mobile application(s) of CTF Life, or otherwise uses CTF Life's products and/or services by phone or any other means from Mainland China; and/or
- (ii) 持有中國內地護照及/或居民身份證的個人，到訪周大福人壽在香港的客服中心或其他實體場所或在香港通過手機或任何其他方式使用周大福人壽產品及/或服務，  
an individual holding a Mainland China passport and/or resident identity card who visits the service centres or other physical premises of CTF Life in Hong Kong or otherwise uses CTF Life's products and/or services by phone or any other means in Hong Kong,

除(i)周大福人壽私隱政策和(ii)本聲明以及中國內地適用的數據保護法律和法規外，周大福人壽將根據“中華人民共和國附錄”處理您的個人資料。就此處目的而言，中國內地是指除香港、中華人民共和國澳門特別行政區和台灣以外的地區。

your personal data will be processed by CTF Life in accordance with the “People's Republic of China Addendum” in addition to the (i) CTF Life Privacy Policy Statement and (ii) this Statement, as well as the applicable data protection laws and regulations in Mainland China which, for the current purposes, excludes Hong Kong, the Macau Special Administrative Region of the People's Republic of China and Taiwan.

中華人民共和國附錄：<https://www.ctflife.com.hk/tc/disclaimer/prcaddendum>

The People's Republic of China Addendum: <https://www.ctflife.com.hk/en/disclaimer/prcaddendum>

中華人民共和國附錄之附件1：<https://www.ctflife.com.hk/tc/disclaimer/prcaddendum/appendix1>

Index 1 to the People's Republic of China Addendum: <https://www.ctflife.com.hk/en/disclaimer/prcaddendum/appendix1>

中華人民共和國附錄之附件2：<https://www.ctflife.com.hk/tc/disclaimer/prcaddendum/appendix2>

Index 2 to the People's Republic of China Addendum: <https://www.ctflife.com.hk/en/disclaimer/prcaddendum/appendix2>

中華人民共和國附錄之附件3：<https://www.ctflife.com.hk/tc/disclaimer/prcaddendum/appendix3>

Index 3 to the People's Republic of China Addendum: <https://www.ctflife.com.hk/en/disclaimer/prcaddendum/appendix3>

中華人民共和國附錄之附件A-關於處理未成年人個人資料的規則：<https://www.ctflife.com.hk/tc/disclaimer/prcaddendum/annexA>

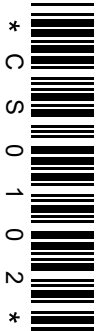
Annex A to the People's Republic of China Addendum – Rules on processing minors' personal data:

<https://www.ctflife.com.hk/en/disclaimer/prcaddendum/annexA>

我，作為保單持有人及/或受保人（如適用）及/或未成年人的父母或法定監護人（如適用）已閱讀理解並同意周大福人壽的中華人民共和國附錄（“附錄”）及附錄之附件A（“附件A”）（如適用）全部內容。

I, as the Policy Owner and/or the Insured (if applicable) and/or the parent or legal guardian of the Minor (if applicable), have read, understood and agreed to all content contained in the CTF Life's People's Republic of China Addendum (“Addendum”) and Annex A to the Addendum (“Annex A”) (where applicable).

保單持有人 Policy Owner	受保人 Insured	未成年人的父母 或法定監護人 Parent or legal guardian of the Minor	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	本人同意根據“附錄”及“附件A”（如適用）目的對本人及/或未成年人的個人信息（包括敏感個人信息）的收集、使用及處理。 I consent to the collection, use and processing of my and/or the Minor's personal data (including sensitive personal data) in connection with the Purposes set out in the “Addendum” and “Annex A” (if applicable).
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	本人同意將本人及/或未成年人的個人信息（包括敏感個人信息）轉移至中國內地以外地區。 I consent to the transfer of my and/or the Minor's personal data (including sensitive personal data) to outside Mainland China.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	本人同意向第三方提供本人及/或未成年人的個人信息（包括敏感個人信息）。 I consent to providing my and/or the Minor's personal data (including sensitive personal data) to third parties.



2501

我，作為保單持有人及/或受保人（如適用）及/或未成年人的父母或法定監護人（如適用），**確認上述本人勾選“同意”** (i) 有關根據“附錄”及“附件A”目的對本人作為保單持有人及/或受保人（如適用）及/或未成年人（如適用）的個人信息(包括敏感個人信息)的收集、使用及處理及/或 (ii) 轉移本人作為保單持有人及/或受保人（如適用）及/或未成年人（如適用）的個人信息(包括敏感個人信息)至中國內地以外地區及/或 (iii) 向第三方提供本人作為保單持有人及/或受保人（如適用）及/或未成年人（如適用）的個人信息(包括敏感個人信息)，**此等“同意”將適用於本人作為保單持有人及/或受保人（如適用）及/或未成年人（如適用）在周大福人壽作為保單持有人及/或受保人的所有現行生效及/或等候復效的保單（如適用）。**

I, as the Policy Owner and/or the Insured (if applicable) and/or the parent or legal guardian of the Minor (if applicable), **confirm my respective consent given above in relation to** (i) the collection, use and processing of personal data (including sensitive personal data) of myself as the Policy Owner and/or the Insured (if applicable) and/or the Minor (if applicable) in connection with the Purposes set out in the “Addendum” and “Annex A” and/or (ii) the transfer of personal data (including sensitive personal data) of myself as the Policy Owner and/or the Insured (if applicable) and/or the Minor (if applicable) to outside Mainland China and/or (iii) providing personal data (including sensitive personal data) of myself as the Policy Owner and/or the Insured (if applicable) and/or the Minor (if applicable) to third parties, **shall be applicable to all existing policies which are in-force and/or waiting for reinstatement of myself as the Policy Owner and/or the Insured (if applicable) and/or the Minor (if applicable) as the Policy Owner and/or the Insured at CTF Life (if applicable).**

本聲明受香港法律約束並據其進行解釋。

This Statement shall be governed by, and construed in accordance with, the laws of Hong Kong.

我已閱讀並理解以上周大福人壽的《個人資料收集聲明》。

I have read and understood the above Personal Information Collection Statement of CTF Life.

我同意接收來自周大福人壽的直接促銷，詳情已載於上文所述的《個人資料收集聲明》。

I consent to receive direct marketing from CTF Life, details of which have been set out in the Personal Information Collection Statement mentioned above.

我同意接收來自周大福人壽的關聯公司和/或周大福人壽的營銷合作夥伴的直接促銷，詳情已載於上文所述的《個人資料收集聲明》。

I consent to receive direct marketing from CTF Life's Affiliates and/or from CTF Life's Marketing Partners, details of which have been set out in the Personal Information Collection Statement mentioned above.

\_\_\_\_\_  
申請人/保單持有人姓名 (如非準受保人/受保人)  
Name of the Applicant / Policy Owner  
(if other than the Proposed Insured / Insured)

X \_\_\_\_\_  
申請人/保單持有人簽署 (如非準受保人/受保人)  
Signature of the Applicant / Policy Owner  
(if other than the Proposed Insured / Insured)

\_\_\_\_\_  
簽署日期 (日 / 月 / 年)  
Signed on (DD / MM / YY)

\_\_\_\_\_  
準受保人/受保人姓名 (適用於18歲或以上)  
Name of the Proposed Insured / Insured  
(Applicable to age 18 or above)

X \_\_\_\_\_  
準受保人/受保人簽署 (適用於18歲或以上)  
Signature of the Proposed Insured / Insured  
(Applicable to age 18 or above)

\_\_\_\_\_  
簽署日期 (日 / 月 / 年)  
Signed on (DD / MM / YY)

\_\_\_\_\_  
準受保人/受保人父母姓名或法定監護人  
(如準受保人/受保人18歲以下)  
Name of Proposed Insured / Insured's parent  
or legal guardian (if proposed insured / Insured  
aged 18 below)

X \_\_\_\_\_  
準受保人/受保人父母或法定監護人簽署  
(如準受保人/受保人18歲以下)  
Signature of Proposed Insured / Insured's  
parent or legal guardian (if proposed insured /  
Insured aged 18 below)

\_\_\_\_\_  
簽署日期 (日 / 月 / 年)  
Signed on (DD / MM / YY)



2501