




**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	 P1472044
<div></div>	<div></div>	<div></div>	

IMPORTANT NOTES 注意事項：

- 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）
- 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）
- 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。
- 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。
- 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。
- 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。
- 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。
- 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。
- 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****For “Treasure Master Plus 2” 適用於 “卓達智悅 2”**

The minimum remaining balance of each Investment Option (Cash Distribution) after withdrawal of unit should be at least US\$2,000 or HK\$16,000 or RMB14,000.

每項投資選擇（現金分派）於提取單位後之最低餘額為2,000美元或16,000港元或14,000人民幣。

*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。

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

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 與保單持有人之關係	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	Applicant's Relationship with owner 申請人與保單持有人之關係	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 與保單持有人之關係	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。

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 / Treasure Master Plus 2 不適用於「您想」/「自悠人生」/「卓達智悅 2」)

- for Regular premium and / or Regular top up - 基本保費及 / 或定期額外投資保費 <input type="checkbox"/> With / Continue Auto-Rebalancing 設立 / 繼續自動平衡投資 <input type="checkbox"/> 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。	<table border="1"> <thead> <tr> <th>*Code 代號</th> <th>Investment Allocation 投資分配</th> </tr> </thead> <tbody> <tr><td>_____</td><td>_____ %</td></tr> <tr><td>_____</td><td>_____ %</td></tr> <tr><td>_____</td><td>_____ %</td></tr> <tr><td>_____</td><td>_____ %</td></tr> <tr><td>_____</td><td>_____ %</td></tr> <tr><td>_____</td><td>_____ %</td></tr> <tr><td>_____</td><td>_____ %</td></tr> <tr><td>_____</td><td>_____ %</td></tr> <tr><td>_____</td><td>_____ %</td></tr> <tr><td>_____</td><td>_____ %</td></tr> <tr> <td>Total 共</td> <td>= 100%</td> </tr> </tbody> </table>	*Code 代號	Investment Allocation 投資分配	_____	_____ %	_____	_____ %	_____	_____ %	_____	_____ %	_____	_____ %	_____	_____ %	_____	_____ %	_____	_____ %	_____	_____ %	_____	_____ %	Total 共	= 100%
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2.2. ☐ Switching 調配

For U-Select / Treasure Master Plus 2 適用於「您想」/「卓達智悅 2」

The minimum investment amount for each Investment Option (Cash Distribution) through switch-in is RMB14,000 (applicable to “Treasure Master Plus 2” only) or 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14,000人民幣（只適用於“卓達智悅 2”）或2,000美元或16,000港元。

For “Treasure Master Plus 2” 適用於“卓達智悅 2”

The minimum remaining balance of each Investment Option (Cash Distribution) after each switch-out should be at least US\$2,000 or HK\$16,000 or RMB14,000.

每項投資選擇（現金分派）於調配後之最低餘額為2,000美元或16,000港元或14,000人民幣。

Switch out 轉換出

*Code 代號	No of units 單位數目
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
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Switch in 轉換入

*Code 代號	Percentage 百分比
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

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。

OPPOSF17(C).0623

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

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

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：

(i) I have read, understood and agreed to comply with the contract and principal brochure for the policy, including information relating to the underlying fund / investment (for investment-linked plans) and the applicable fees and charges. Besides, I have also read, understood and agreed to comply with the offering document(s) of the underlying fund(s) of respective investment option(s) (including any dealing restrictions) before making investment decision(s). I / We also understand and agree to accept any associated risk.
本人已詳閱、完全明白及同意遵守有關保單的契約及主要銷售刊物，包括與投資連繫式計劃相關之連繫基金 / 投資及適用的費用及收費。此外，本人已在進行投資決定前詳閱、明白及同意遵守有關投資選擇之相應連繫基金的銷售文件（包括任何交易限制）。本人亦明白及同意接受任何相關風險。

(ii) For investment-linked plans, I have evaluated the level of risk of the underlying fund / investment myself and have selected the investment options for the purposes of the policy based on my own judgement and personal needs.
本人亦已評估投資連繫式計劃各連繫基金 / 投資之風險水平。本人依據本人的判斷和個人需要作出此保單之投資選擇。

(iii) Applicable to payment in cheque 適用於以支票支付的款項：
I understand that any benefits payable under the Policy will be paid in the latest policy currency as shown on the Policy Information Page of the Policy or, if applicable, the appropriate subsequent endorsement. Accordingly, the provision of the option to receive any such benefits in a currency other than the latest policy currency (the "Opted Currency") is solely a service offered by the Company at its discretion. I understand and agree that should I opt for payment of any benefits payable under the Policy in the Opted 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 conversion.
本人明白所有保單利益之款項將根據保單資料頁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，提供選擇以最近期的保單貨幣以外的貨幣（“選擇貨幣”）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。本人明白及同意如本人選擇任何保單下所作出的利益款項以“選擇貨幣”支付，本人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。

(iv) Applicable to Part C only. I hereby confirm that I have read, understood and agreed to be bound by the Terms and Conditions of AIA e-Invest and / or AIA e-Advice, whichever is applicable. For details of the Terms and Conditions, please visit www.aia.com.hk.
只適用於丙部。本人確實已閱讀及明白「友邦投資易」或 / 及「友邦電子通知書」（如適用）之條款及條件，並同意受其約束。有關條款及條件之詳情，請參閱www.aia.com.hk。

(v) If you choose any investment option which aims to distribute cash dividends on a regular basis, please note the associated risks. In particular, the corresponding underlying fund does not guarantee the distribution of cash dividends, the frequency of distribution, and the amount or rate of cash dividends. Also, the underlying fund may at its discretion pay cash dividend out of investment income, capital gains or capital while charging / paying all of its fees and expenses to / out of its capital (i.e. effectively pay cash dividend out of capital). Please refer to the Investment Options Brochure for the associated risks. For details of the cash dividend composition of the underlying fund, please visit <http://www.aia.com.hk/>.
如閣下選擇任何旨在定期分派股息的投資選擇，請注意相關風險。尤其，相應的連繫基金並不保證股息的分派，分派的頻率，及股息的金額或息率。此外，相關的連繫基金或可酌情從資本或總收益撥付股息並同時從其資本中收取 / 支付全部或部分的費用和支出（即實際上從資本中撥付股息）。請參閱投資選擇小冊子以了解相關風險。有關連繫基金股息組成的詳情，請瀏覽<http://www.aia.com.hk/>。





(vi) If you have signed the last Risk-Profile-Questionnaire over 12 months or there are substantial change to the last Risk Profile Questionnaire, please seek assistance from your "licensed" financial planner / intermediaries to conduct RPQ for updating your risk profile. (Applicable to Fund switching / Fund allocation / Unswitched Top Up / Regular Top Up)
若您在12個月之前簽署了風險承擔能力問卷，或就上一個風險承擔能力問卷中的內容或資料有重大變化，請聯繫你的“許可”財務規劃師 / 中介人協助以進行風險承擔能力問卷以便更新您的風險狀況。（適用於資金調配 / 基金分配 / 額外投資保費（不定期） / 定期額外投資保費）





I / We confirm that I / we have read and understood the AIA Personal Information Collection Statement (“AIA PIC”). I / We declare and agree that any personal data and other information relating to me / us or my / our policy(ies) or investments contained in this application or collected, obtained, compiled or held by the Company by any means from time to time may be collected and utilized in accordance with the AIA PIC. I / We acknowledge and consent to the transfer of my / our personal data outside of Hong Kong (for policies issued in Hong Kong) or Macau (for policies issued in Macau), as the case may be, for the purposes and to the types of transferee as set out in the AIA PIC.

The updated version of AIA PIC is available for download from its website: www.aia.com.hk, and is made available upon request.

本人/我們確認本人/我們已閱讀及明白**AIA**個人資料收集聲明（「**AIA**個人資料收集聲明」）。本人/我們聲明及同意在本申請所載或貴公司不時以任何方法收集所得、編製或持有的任何個人資料及關於本人/我們或本人/我們的保單或投資的其他資料，可根據**AIA**個人資料收集聲明收集及使用。本人/我們知悉及同意就**AIA**個人資料收集聲明所述目的視乎情況轉讓本人/我們的個人資料至香港（如保單在香港繕發）或澳門（如保單在澳門繕發）境外予**AIA**個人資料收集聲明所載的資料承讓人。

AIA 個人資料收集聲明的最新版本可於以下網址下載：www.aia.com.hk，及可向貴公司索取。


 on   
 Signature of Owner / Trustee
 持有人 / 信託人簽名


 on   
 Signature of Assignee
 受讓人簽名 (if applicable 如適用)

1) Signature must correspond with the Company's existing record. Please refer to the copy of the application form attached to the Policy or to the signature specimen on any document subsequently recorded by the Company.
簽名須與本公司存案相符。請參閱保單上要保書之影印本或於保單續發後更換及經本公司確認之簽署。

2) Any amendments in this form must be countersigned by the Owner / Assignee / Trustee in full signature.
任何在此表格上的更改，持有人 / 受讓人 / 信託人必須於更改在旁位置簽署作實。

* For details of the investment options or underlying funds / investments of the codes, please refer to the 'Underlying Funds / Investments Prices' under the section of Investment Information in the Company website AIA.COM.HK or the Investment Options Brochure.

* 有關代號之投資選擇以及其連繫基金 / 投資的資料，請參閱本公司網頁 AIA.COM.HK 投資資料部份之連繫基金 / 投資價格或投資選擇小冊子。

PLEASE DO NOT SIGN ON BLANK FORM 請勿在空白表格上簽署



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下載AIA「友聯繫」手機應用程式以便輕鬆管理您的保單！