

Request for Change of Insured/Successor Insured Form

更改保單受保人/繼任受保人申請書

Please tick appropriate box(es) for request 請於適當之空格內加上 號 New Request 新申請 Reply 跟進文件

Policy Number: 保單編號	Full Name of Insured: 受保人姓名	Full Name of Policyowner: 保單持有人姓名
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Important Note*

Change of Insured is subject to the following conditions:

- (i) the proposed new insured (“New Insured”) and the assignee of the Policy (if any) must consent to the change of Insured in writing;
- (ii) both the Insured and the New Insured must be alive during the application;
- (iii) at the time when we receive the request,
 - the age of the new insured must meet the specific requirements of the plans, the terms and conditions may vary; and
 - the New Insured must meet the prevailing underwriting requirements determined by us from time to time;
- (iv) Policyowner must provide the evidence of insurability of the New Insured upon our request and to our satisfaction;
- (v) Policyowner must have adequate insurable interest in the New Insured;
- (vi) Any other prevailing rules determined by us in our sole discretion from time to time have been complied with;
- (vii) Annuity option (if any) has not been exercised;
- (viii) All riders (if any) will be terminated on the effective date of change of Insured;
- (ix) Changing the Insured does not change the record of the Beneficiary;
- (x) If applications for change of Owner and change of Insured are received by us at the same time, we will process the application for change of Insured first.

*For details of terms and conditions, please refer to the Policy provision.

重要事項*

更改受保人須符合以下條件：

- (i) 準新受保人（「新受保人」）及保單之承讓人（如有）必須書面同意更改受保人；
- (ii) 受保人及新受保人必須於申請期間仍然在生；
- (iii) 於我們收到申請時，
 - 新受保人的年齡需視乎個別計劃之特定要求，條款和條件可能會有所不同；
 - 新受保人必須符合我們不時決定當時適用的核保規定；
- (iv) 保單持有人必須按我們的要求提供我們所滿意的關於新受保人的可保證明；
- (v) 保單持有人必須對新受保人有足夠的可保利益；
- (vi) 符合任何由我們按單獨酌情權不時釐定當時適用的其他規則；
- (vii) 年金選擇未被行使；
- (viii) 所有附加保障計劃（如有）將於更改受保人生效日被終止；
- (ix) 更改受保人不會更改受益人記錄；
- (x) 如我們同時收到更改保單持有人及更改受保人之申請，我們將先處理更改受保人之申請。

* 詳情之細則及條款，請參閱保單條款。

Part I: Personal Particulars 第一部份: 個人資料 Change of New Insured
更改新受保人 Change of Successor Insured
更改/加入繼任受保人Name in English
姓名(英文)Name in Chinese
姓名(中文)ID card/Birth Cert/ Passport No.
身份證/出生證明書/護照號碼Date of Birth (dd/mm/yyyy):
出生日期(日/月/年)Place of Birth
出生地Sex
性別 Female 女 Male 男Nationality
國籍Citizenship (Country)
公民身份(國家)Residency
居住籍Occupation
職業Business Nature
公司業務性質Relationship to Policyowner:
與保單持有人的關係 Spouse 配偶 Parent 父母 Children 子女 (If the child is aged 18 or above, please provide an explanation. 如子女年齡為18歲或以上, 請提供合理解釋)

Details 詳情: _____

 ^其他Others

請註明 Please specify: _____

^ Please provide legal document(s) to prove guardianship for one of the following relationships: sibling, grandparent, grandchild, great grandparent, or great grandchild.

^ 如屬以下關係: 兄弟/姊妹/祖父母/孫子女/曾祖父母/曾孫子女, 請提供法律文件證明其監護人身份

Declaration: I/WE HEREBY DECLARE AND AGREE THAT:

- The above request for change of Insured/designation of Successor Insured/change of Successor Insured will not take effect unless the following conditions are met: (i) All required documents are submitted in full; and (ii) an endorsement with the effective date of change of Insured has been issued by the Company.
- All information provided in this form whether or not written by my/own hands is the best of my/our knowledge and belief complete and true.

聲明: 本人/吾等 謹此聲明及同意:

- 上述之更改保單受保人/指定繼任受保人/更改繼任受保人申請必須符合下列所有條件方能生效: (i) 所有需要之文件皆全數並完整無缺遞交。(ii) 當本公司發出附加批註列明更改受保人之生效日期。
- 上述一切資料, 不論是否本人/吾等親手所寫, 就本人/吾等所知所信, 均為事實之全部並確實無訛。

Part II: Personal Information Collection Statement 第二部份: 個人資料收集聲明Chubb Life Insurance Hong Kong Limited ("Chubb Life HK", "Company", "we", "us", "our").
安達人壽保險香港有限公司(「安達人壽香港」、「本公司」、「我們」或「我們的」)。

Chubb Life HK recognizes the importance of protecting your privacy and is fully committed to implementing and complying with the data protection principles under the requirements of the Personal Data (Privacy) Ordinance (Chapter 486), Laws of the Hong Kong Special Administrative Region and if applicable, the Personal Information Protection Law of the People's Republic of China.

安達人壽香港明白保護閣下的私隱的重要性, 並致力實施和遵守香港特別行政區法律《個人資料(私隱)條例》(第486章)下的保障資料原則及中華人民共和國《個人信息保護法》。

Personal Information we may collect 我們可能收集的個人資料

In the course of us providing you with the insurance policy and related services (“Services”), we may from time to time and only to the extent necessary to provide the Services, collect your personal information including any sensitive personal information (with examples of such sensitive information as **bolded and underlined below**) for the purposes set out in this Personal Information Collection Statement (“PICS”). We may collect your personal information directly from you, or indirectly from other third parties in connection with the Services, including but not limited to when you complete or submit an application form, submit a claim, access our website, or participate in any of our and/or our partner’s programs. The personal information we collect may include: your personal identification information (e.g., your name, **identity document number**, nationality, citizenship, sex, date of birth, place of birth, **marital status**, residential address), contact information (e.g., residential phone number, workplace phone number, mobile phone number, mailing address, e-mail address), work and financial information (e.g., employer’s name, industry/nature of business, workplace address, present occupation, exact duties, **income**, **credit information**, **financial details**, **bank account information**, **tax information**), policy information, claims history **biometric data**, **medical and health records**, **religion**, **specific social status**, **tracking/location information and, if applicable, data of minors** (collectively the “personal information”).

在我們為閣下提供保單和相關服務（「服務」）的過程中，我們可能會不時且僅在需要提供服務的範圍內收集閣下的個人資料，當中包括任何敏感個人資料（以如下**加粗並劃線**所列敏感個人資料為例），用於本個人資料收集聲明（「**個人資料收集聲明**」）中列出的目的。我們可能會直接從閣下收集閣下的個人資料，或從與服務相關的其他第三方間接收集閣下的個人信息，包括但不限於閣下完成填寫或提交申請表、提交索償、登入我們的網站或參與我們的及/或我們合作夥伴的任何計劃。我們收集的個人資料可能包括：閣下的個人身份資料（例如，閣下的姓名、**身份證件號碼**、國籍、公民身分、性別、出生日期、出生地點、**婚姻狀況**、居住地址）、聯絡資料（例如，住宅電話號碼、工作單位電話號碼、手機號碼、郵寄地址、電子郵件地址）、工作及財務資料（例如，僱主名稱、行業/業務性質、工作場所地址、目前職業、實質職責、**收入**、**信用資料**、**財務詳細資料**、**銀行帳戶資料**、**稅務資料**）、保單資料、索償歷史、**生物識別資料**、**醫療和健康紀錄**、**宗教**、**特定社會地位**、**追蹤/位置資料以及14歲以下未成年人的資料（如適用）**（統稱為「個人資料」）。

When you provide us with personal information about another person in connection with your application or insurance policy, which may include but is not limited to your dependents, the insured, the beneficiaries, your authorized representatives and any other individuals whom you have provided personal information of (“relevant persons”), you confirm you have obtained that relevant persons’ consent and have authority to provide such personal information to us for the purposes stated in this PICS.

當閣下向我們提供與閣下的申請或保單有關的其他人的個人資料時，這可能包括但不限於閣下的受養人、受保人、受益人、閣下的獲授權代表以及閣下為其提供個人資料的任何其他人士（「**有關人士**」），閣下確認已獲得該有關人士的同意並有權為本個人資料收集聲明中所述的目的向我們提供該等個人資料。

As a condition precedent to this application, you shall provide us with the required information of the form. If you do not provide us with the required information, this may result in us not being able to process your application, process claims or provide you with the Services.

作為閣下此申請的先決條件，閣下需要向我們提供申請書所需的資料。如果閣下不向我們提供所需資料，可能會導致我們無法處理閣下的申請、處理索償或向閣下提供服務。

What we may use your Personal Information for 我們可能將閣下的個人資料用於什麼目的

By making the application and receiving the Services, you give us your consent to use, process, disclose, transfer, store and otherwise, share your and the relevant persons’ personal information for any purpose related to the Services, and to communicate with you and the relevant persons for the purposes listed below (“Purposes”):

通過提出申請和接受服務，閣下同意我們為與服務相關的任何目的使用、處理、披露、轉移、儲存及以其它方式分享閣下和有關人士的個人資料，並就下列目的與閣下和有關人士溝通（「**該目的**」）：

- (i) to process and evaluate this and any future application for the insurance policy; 處理和評估此申請以及任何未來的保單申請;
- (ii) for policy administration, processing payments and premium collection; 用於保單管理、處理付款和保費收取;
- (iii) to conduct medical, security and underwriting checks; 進行任何醫療、保安及核保檢查;
- (iv) to assess insurance claims and to process payments; 評估保險索償及處理付款事宜;
- (v) to provide insurance products and related services; 提供保險產品及有關服務;
- (vi) to promote and directly market to you as follows: 向閣下推廣及直接促銷以下內容:
 - (a) **For Hong Kong customers only:** with your consent, to promote and directly market to you: (a) the insurance products and services of Chubb Life HK; (b) mandatory provident fund-related products/services sponsored by the third party providers connected with us; (c) insurance, financial or investment related products/services, rewards, loyalty, co-branding and/or other privileges programs offered by us, our affiliates, our co-branding partners, our business partners;
僅適用於香港客戶：在閣下的同意下，向閣下推廣及直接促銷(a)安達人壽香港的保險產品/服務;(b)與我們有關聯的第三方供應商所提供的強制性公積金相關產品/服務;(c) 由我們、我們的聯繫公司、我們的聯合品牌夥伴或我們的商業合作夥伴提供的保險、金融或投資相關產品/服務、獎賞、年資獎勵、聯合品牌及/或其他優惠計劃;
 - (b) **For Mainland China residents or I.D. card holders only:** with your consent, to promote and directly market to you rewards, loyalty, co-branding and/or other privileges programs offered by us, our affiliates, our co-branding partners, our business partners;
僅適用於中國大陸居民或身份證持證人：在閣下的同意下，向閣下推廣及直接促銷由我們、我們的聯繫公司、我們的聯合品牌夥伴或我們的商業合作夥伴提供的獎賞、年資獎勵、聯合品牌及/或其他優惠計劃;
- (vii) to perform data matching and communicating with you and/or your relevant persons for such purposes; 進行資料核對，及因此用途與閣下及/或閣下的有關人士聯絡;
- (viii) to cooperate with law enforcement bodies for law enforcement purposes, to prevent any serious threat to public safety; for police investigation purposes; or to comply with laws, rules, regulations, codes of practice, guidelines, or requirements imposed by or agreed with government or regulatory bodies; or for litigation; 協助執法團體執法，以防止任何嚴重威脅公眾安全的事宜；作警察進行調查用途；或遵守政府或監管機構施加或協議的法律、規則、規例、實務守則、指引或要求；或訴訟;
- (ix) to apply registration of activities organized and/or sponsored by Chubb Life HK; 申請登記參加安達人壽香港舉辦及/或贊助的活動;
- (x) to enable industry associations, federations, government or regulatory bodies to carry out their functions and requirements that may be assigned to them from time to time as are reasonably required and in the interests of the insurance industry; 讓保險行業協會及聯會、政府或監管機構執行其經不時修定及為合理要求以維護保險行業利益而指派的功能及要求;
- (xi) to conduct research, surveys, data analytics and statistics, administration, communications, computer, security and other services (including medical services, mailing and IT services) in connection with the usual operations of the Company as a life insurance company; and 進行與本公司作為人壽保險公司的日常運營有關的研究、調查、資料分析和統計、行政、通訊、電腦、安全和其他服務（包括醫療服務、郵寄和資訊科技服務）；及
- (xii) for any other purpose directly relating to any of the above. 用於與上述任何一項直接相關的任何其他目的。

Who we may share your personal information with 我們可能與誰分享閣下的個人資料

You understand that we operate internationally and our services to you are, in particular, provided from Hong Kong or through our vendors outside of Hong Kong. If you do not consent to Chubb Life HK's transfer of your personal information outside of Hong Kong and/or Mainland China, this may result in us not being able to process your application, process claims or provide you with the Services. We may disclose, transfer or otherwise share your or the relevant persons' personal information, within or outside of Hong Kong and/or Mainland China., for the Purposes set out in this application, to the following transferees (“**Transferees**”):

閣下了解我們的業務是國際化的，特別是我們從香港或透過我們在香港以外的供應商向閣下提供服務。如果閣下不同意安達人壽香港將閣下的個人資料轉移到香港及/或中國大陸境外，可能會導致我們無法處理閣下的申請、處理理賠或向閣下提供服務。我們可能會就本申請中所述的目的，在香港及/或中國大陸境內或境外披露、轉移或以其它方式分享閣下或有關人士的個人資料至以下資料轉移接收方（「**資料轉移接收方**」）：

- (i) any agents, insurance intermediaries, third party providers or administrators such as medical and healthcare providers, hospitals, in connection with the distribution of our products and services, placement or handling of your insurance policy and any related claims and/or services;
就我們的產品和服務分銷、安排或處理閣下的保單及任何相關索償及/或服務有關的任何代理、保險中介人、第三方供應商或管理人員，例如醫療及保健供應商和醫院；
- (ii) reinsurers, claims investigators, loss adjudicators, medical advisors, recovery agents, debt collection agencies, credit reference agencies, law enforcement bodies and police, fraud prevention/detection agencies, organizations that consolidate underwriting and claims information for the insurance industry, and databases or registers (and their operators) used by the insurance industry to analyze and check information provided against existing information;
再保險公司、理賠調查公司、理賠調查員、醫療顧問、索償代理、債務追收公司、信貸資料機構、執法團體及警方、防止/偵測欺詐機構、為保險業整合承保及索償資料的機構以及保險業用作分析和基於現有資料核對所提供資料的資料庫或登記處（及其運營人）；
- (iii) any branch, subsidiary, holding company, associated company or affiliates of Chubb Life HK (“**Group Companies**”) whether established in or outside of Hong Kong;
安達人壽香港的任何分行、附屬公司、控股公司、聯營公司或聯繫公司（「**集團公司**」），不論在香港境內或境外成立；
- (iv) any agents, contractors, advisors or third-party service providers providing accounting, finance, legal, payment, data processing and storage, administration, telecommunications, mailing, printing, computer, technology, security, analytics, research, funds management, regulatory screenings, customer services, call centre services, and/or other services in connection with our operations ;
and
任何代理、承包商、顧問或第三方服務供應商，以提供會計、財務、法務、付款、資料處理及儲存、行政、電訊、郵寄、印刷、電腦、科技、安全、分析、研究、基金管理、法規審查、客戶服務、電話中心服務及/或與我們的營運相關的其他服務；及
- (v) insurance industry associations and federations and government or judicial or competent regulatory bodies or any person to whom we have a legal or regulatory obligation to make disclosure.
保險行業協會及聯會及我們有法律或監管義務向其作出披露的政府或司法或主管監管機構或任何人士。

If you are a Mainland China resident or I.D. card holder, you may refer to https://www.chubb.com/content/dam/chubb-sites/chubb/hk-en/pdf/pipl_list_of_recipients.pdf for a list of Transferees to whom Chubb Life HK may share your data. The list of Transferees will be updated periodically.

如閣下為中國大陸居民或身份證持證人，閣下可以於https://www.chubb.com/content/dam/chubb-sites/chubb/hk-en/pdf/pipl_list_of_recipients.pdf 以獲取安達人壽香港可能與其共享您的資料的資料轉移接收方名單，名單將不時更新。

We may also purchase or sell one or more business(es) (or portions thereof), and where permissible by applicable laws your or your relevant persons' personal information may be transferred as a part of such purchase or sale, or proposed purchase or sale.

我們也可能購買或出售一項或多項業務（或其部分），且在適用法律允許的情況下，閣下或閣下的有關人士的個人資料可作為該買賣或擬議買賣的一部分予以轉讓。

How we may store your personal information 我們如何儲存閣下的個人資料

The personal information you provide to us will be stored in Hong Kong or other countries/regions outside the country/region where you are located. We will only retain your personal information for as long as necessary to achieve the purposes described above, unless there is a mandatory retention requirement by law.

閣下提供給我們的個人資料將儲存在香港或閣下所在國家/地區以外的其他國家/地區。我們只會在實現上述目的所需的時間內保留閣下的個人資料，除非法律有強制保留要求。

How we protect minors' personal information 我們如何保護未成年人的個人資料

We attach great importance to the protection of personal information of minors. If you are acting for a minor under the age of 18 (or where applicable, defined in Mainland China as a minor if under the age of 14), the consent of the minor's parents or guardians should be obtained before using our Services. The parents or guardians should carefully read the PICS before providing us with the personal information of the minors.

我們高度重視未成年人個人資料的保護。如果閣下代表18歲以下的未成年人（或在適用的情況下，在中國大陸被定義為14歲以下的未成年人），在使用我們的服務前，應獲得未成年人父母或監護人的同意。父母或監護人在向我們提供未成年人個人資料前，應仔細閱讀《個人資料收集聲明》。

Your rights 閣下的權利

Subject to applicable laws and to the extent legal requirements are met, you may have the right to access, duplicate, or correct your personal information held by Chubb Life HK and, in certain circumstances, request that it be deleted. You may be able to withdraw your consent where we rely upon this to process your personal information if our processing relies on your consent. You may have the right to restrict or refuse the processing of your personal information in some circumstances. Please be aware that under certain circumstances, we may not be able to comply with such requests from you, in which circumstance we will notify you of the reason for such decision. We may also charge you a reasonable fee to process your data related request.

根據適用法律並在滿足法律要求的情況下，閣下有權查閱、複製或更正安達人壽香港持有的閣下的個人資料，並在某些情況下有權要求將其刪除。如果我們基於閣下的同意來處理閣下的個人資料，閣下可以撤回閣下的同意。在某些情況下，閣下有權限制或拒絕對閣下個人資料的處理。請注意，在某些情況下，我們可能無法滿足閣下的此類請求，在此情況下，我們將通知閣下做出此類決定的原因。我們也可能會向閣下收取合理的費用，以處理閣下的資料相關要求。

For more details of the Company's policies on personal information and privacy protection, please read the Chubb Life HK's Privacy Policy available at <https://www.chubb.com/hk-en/footer/chubb-life-privacy-policy.html>. Any questions regarding personal information, and the exercise of any of the personal information rights listed above, should be made in writing and submitted to:

有關本公司個人資料及私隱保障政策的詳情，請參閱安達人壽香港的私隱政策，網址為<https://www.chubb.com/hk-zh/footer/chubb-life-privacy-policy.html>。有關個人資料、以及行使上述任何個人資料權利的任何問題，請以書面提出並提交至：

- **For Mainland China residents or I.D. card holders:** Data Protection Officer of Chubb Life Insurance Hong Kong Limited at Enquiries.prchkLife@chubb.com and/or 35/F, Chubb Tower, Windsor House, 311 Gloucester Road, Causeway Bay, Hong Kong.
中國大陸居民或身份證持證人：安達人壽保險香港有限公司的資料保護主任，並送交至Enquiries.prchkLife@chubb.com及/或香港銅鑼灣告士打道三一一號皇室大廈安達人壽大樓三十五樓。
- **For all other customers:** Data Protection Officer of Chubb Life Insurance Hong Kong Limited at Enquiries.HKLife@chubb.com and/or 35/F, Chubb Tower, Windsor House, 311 Gloucester Road, Causeway Bay, Hong Kong.
所有其他客戶：安達人壽保險香港有限公司的資料保護主任，並送交至Enquiries.HKLife@chubb.com及/或香港銅鑼灣告士打道三一一號皇室大廈安達人壽大樓三十五樓。

Part III: Use of Personal Information Consent Statements in Mainland China 第三部份：中國大陸使用個人資料同意聲明

If you are a Mainland China resident or I.D. card holder, please complete this Part.

如閣下為中國大陸居民或身份證持證人，請完成部分。

FOR MAINLAND CHINA RESIDENTS OR I.D. CARD HOLDERS: Use of Personal Information Consent Statement

中國大陸居民或身份證持證人：使用個人資料同意聲明

By signing this form and receiving the Services, you give consent to Chubb Life HK to process for the Purposes, and to disclose, transfer and otherwise share to the Transferees for processing for the Purposes, your and the relevant persons' personal information. You additionally acknowledge and consent to your and the relevant persons' personal information being provided, transferred to, or shared with another data controller, within or outside of Mainland China, for processing for the Purposes.

閣下簽署本申請書及接受服務，即表示閣下同意安達人壽香港出於該目的處理閣下和有關人士的個人資料，以及披露、轉移及以其他方式分享閣下和有關人士的個人資料予資料轉移接收方，以便出於該目的處理閣下和有關人士的個人資料。此外，閣下確認並同意閣下和有關人士的個人資料可被提供、轉移或分享予中國大陸境內或境外的其他資料控制者，以便其出於該目的進行處理。

- I/We confirm that I/we have read, understood and agree with the Personal Information Collection Statement as set out in the previous part and this Part.
我/我們確認我/我們已閱讀、理解並同意先前部份及此部分所載的《個人資料收集聲明》。
- I/We consent to the processing of my/our sensitive personal information as described in this form.
我/我們同意依照本申請書所述處理我/我們的敏感個人資料。
- I/We consent to my/our personal information being provided, transferred to, stored, used, shared with or processed outside of Mainland China as described in this form.
我/我們同意依照本申請書所述在中國大陸境外提供、轉移、儲存、使用、分享或處理我/我們的個人資料。
- I/We consent to my/our personal information being provided, transferred to, or shared with another data controller for processing as described in this form.
我/我們同意將我/我們的個人資料提供、轉移或分享予其他資料控制者，以便按照本申請書所述進行處理。

NOTE 注意:

Please do not sign on BLANK Form

請勿在空白表格上簽署

Signature specimen must be consistent with that as in your policy record

簽署式樣需與保單紀錄相符

Signature of Witness

見證人簽署

(Name 姓名: _____)

Sign Date (dd/mm/yyyy)

簽署日期 (日/月/年)

Signature of Policyowner

保單持有人簽署

* Signature of Proposed New Insured/Successor Insured

準新受保人/繼任受保人簽署

(Name 姓名: _____)

Sign Date (dd/mm/yyyy)

簽署日期 (日/月/年)

Signature of Assignee

承讓人簽署

(Only applicable if the policy has been assigned)

(適用於此保單已被轉讓)

Signature of Irrevocable Beneficiary

不可撤銷受益人簽署

(Only applicable if the designated beneficiary is an Irrevocable Beneficiary)

(適用於此保單若指定受益人為不可撤銷受益人簽署)

Sign Date (dd/mm/yyyy)

簽署日期 (日/月/年)

* Signature is required for the person whose age is 18 or above

滿18歲或以上之人士必須簽署