

Application/Change/Cancellation For Life Insurance Proceeds Settlement Option

申請/更改/取消人壽保險金支付選擇

| | | |
|------------------------|-----------------------------------|--------------------------------------|
| Policy Number: 保單編號 | Full Name of Insured(s): 受保人姓名 | Full Name of Policyowner: 保單持有人姓名 |
|------------------------|-----------------------------------|--------------------------------------|

- 1) In compliance with the legal and regulatory requirements with respect to the prevention of money laundering and terrorist financing, Chubb Life Insurance Company Ltd. (the "Company") requires to review the customer identity information of the Policy Owner and/or Beneficial Owner ("you") to ensure they are up-to-date and relevant. For any change of customer identity information provided previously, you are required to provide i) the up-to-dated identity information by completing the relevant request form for policy change; and ii) the relevant identification documents proof for the purpose of identification, verification and record keeping.

根據相關法律及監管機構就防止洗錢及恐怖分子資金籌集活動的規定，安達人壽保險有限公司（「本公司」）必須不時覆核保單持有人及/或實益擁有人（「您」）以確保其身份資料反映最新現況及仍屬相關的。如任何身份資料與之前提供的資料有所不同，您必須提供 i) 相關的更改保單事項通知書以更新最新的身份資料；及 ii) 有關的身份證明文件以作識別、驗證及存檔之用。

- 2) In compliance with the legal and regulatory requirements with respect to U.S. Foreign Account Tax Compliance Act (FATCA) and Automatic Exchange of Financial Account Information (AEOL), the Company requires you to provide certain information (including but not limited to place of birth, address, telephone number, citizenship, residency and Taxpayer Identification Number (TIN) etc) by completing the relevant request form for policy change of the Company and other relevant form where it is applicable if you have any change on the tax residence.

根據相關法律及監管機構就美國海外賬戶稅收合規法案及自動交換財務帳戶資料，如您更改稅務居民身份，本公司會要求您填寫相關的更改保單事項通知書以提供相關資料（包括但不限於出生地、住址、電話號碼、公民身份、居籍及稅務編號等等）及其他適用的相關表格。

I, the Policyowner, would like to apply for application/change/cancellation of the Life Insurance Proceeds Settlement Option to the above Policy. I agree the Company to pay the Life Insurance Proceeds to the designated Beneficiary(ies) in the above Policy by way of one of the following options as indicated. This application/change/cancellation supersedes the previous application(s)/change(s)/cancellation(s), if any. 本人保單持有人現就上述保單申請/更改/取消人壽保險金支付選擇。本人同意貴公司按以下所指定之選擇發放人壽保險金予上述保單內指定之受益人。此次申請/更改/取消將取代之前所曾作出之申請/更改/取消(如有)。

Choose one option only 只可揀選一個選擇：

- Installments to Beneficiary(ies)**

以分期形式支付予受益人

Please choose one of the following choices

請選擇以下其中一個選項

| Choice 選項 | Payment Frequency 分期支付形式 | Payment Period (Year) 支付年期 (年) | Minimum Life Insurance Proceeds per Policy# 每張保單的最低人壽保險金# |
|--------------------------|-----------------------------|-----------------------------------|--|
| <input type="checkbox"/> | Annually 按年 | 10 | US\$ 美元 120,000 / HK\$ 港元 936,000 |
| <input type="checkbox"/> | Annually 按年 | 20 | US\$ 美元 120,000 / HK\$ 港元 936,000 |
| <input type="checkbox"/> | Annually 按年 | 30 | US\$ 美元 120,000 / HK\$ 港元 936,000 |
| <input type="checkbox"/> | Monthly 按月 | 10 | US\$ 美元 120,000 / HK\$ 港元 936,000 |
| <input type="checkbox"/> | Monthly 按月 | 20 | US\$ 美元 240,000 / HK\$ 港元 1,872,000 |
| <input type="checkbox"/> | Monthly 按月 | 30 | US\$ 美元 360,000 / HK\$ 港元 2,808,000 |

If the Life Insurance Proceeds payable is less than the minimum Life Insurance Proceeds per Policy under the selected choice, Life Insurance Proceeds will be paid to Beneficiary(ies) in a lump sum.

如須支付的人壽保險金少於已揀選之選項下每張保單的最低人壽保險金，人壽保險金將會以一筆過的形式支付予受益人。

- Cancellation of Life Insurance Proceeds Settlement Option**

取消人壽保險金支付選擇

Life Insurance Proceeds will be paid to Beneficiary(ies) in a lump sum.

人壽保險金將會以一筆過的形式支付予受益人。

- The below section is only applicable to eligible Policyowners. Please refer to item 11 of the Terms and Conditions.

以下部分只適用於合資格保單持有人。請參照條款及細則的第11點。

Designated Date of Life Insurance Proceeds Settlement Option

人壽保險金指定支付日期選擇

Name of Beneficiary

受益人姓名 _____

(dd日/mm月/yyyy年)

Name of Beneficiary

受益人姓名 _____

(dd日/mm月/yyyy年)

Terms and Conditions 條款及細則

- (1) This form is not applicable to Perpetual Life Series.
此表格不適用於世代傳承保險系列。
- (2) Life Insurance Proceeds Settlement Option is only applicable to specified products as determined by the Company from time to time. Please contact your Agent or Intermediary for details.
人壽保險金支付選擇只適用於公司指定產品並由本公司不時決定。詳情請與閣下的保險代理 / 中介人聯絡。
- (3) The Life Insurance Proceeds Settlement Option must be selected while the Insured is still alive. Only the Policyowner can apply/change/cancel Life Insurance Proceeds Settlement Option.
人壽保險金支付選擇必須於受保人在生時選擇。只有保單持有人可以申請/更改/取消人壽保險金支付選擇。
- (4) If there is more than one (1) Beneficiary designated, the Life Insurance Proceeds Settlement Options selected by the Policyowner shall be applied to all Beneficiaries. The Life Insurance Proceeds shall be first allocated to the Beneficiary(ies) in accordance with the proportion specified by the Policyowner, if any, before applying the above selected Life Insurance Proceeds Settlement Option.
如有多於一個指定受益人，由保單持有人所選定人壽保險金支付選擇將適用於所有受益人。在執行上述人壽保險金支付選擇前，人壽保險金將會先根據保單持有人指定之個別人壽保險金的份額（如有）分配至受益人。
- (5) If no Beneficiary is designated when the Life Insurance Proceeds are payable, the Life Insurance Proceeds will be paid in lump sum to Policyowner or his/her estate.
如支付身故賠償時沒有指定受益人，人壽保險金將會以一筆過的形式支付至保單持有人或其遺產。
- (6) If the Policy has been assigned / the Policyowner has been changed, Life Insurance Proceeds Settlement Option will be revoked and the Company will pay the Life Insurance Proceeds in a lump sum payment. After the Policy assignment is cancelled / the Policyowner has been changed, the Policyowner / the new Policyowner can apply Life Insurance Proceeds Settlement Option again.
如保單被轉讓/保單持有人被更改，人壽保險金支付選擇將會被撤回，本公司會以一筆過的形式支付人壽保險金。當保單轉讓已被取消或保單持有人已被更改後，保單持有人或新保單持有人可以再次申請人壽保險金支付選擇。
- (7) Installments to Beneficiary(ies) option is subject to minimum requirements, including but not limited to Minimum Life Insurance Proceeds per Policy, as determined by the Company from time to time.
人壽保險金支付選擇須符合由本公司不時決定之最低要求，包括但不限於每張保單的最低人壽保險金。
- (8) If Installments to Beneficiary(ies) option is selected, interest will accrue on any unpaid balance of the Life Insurance Proceeds until the full amount of Life Insurance Proceeds have been paid to the Beneficiary(ies). The interest rate will be determined by the Company from time to time at our discretion. The accumulated interest (if any) will be paid to the Beneficiary(ies) in the last installment.
如已選擇以分期形式支付予受益人，人壽保險金之未付餘額將獲利息直至全數人壽保險金已支付予受益人，其利率由本公司不時決定。積存的利息（如有）將於最後一期支付予受益人。
- (9) In the event a Beneficiary dies before the end of the selected Payment Period, the remaining balance of the Life Insurance Proceeds together with accrued interest (if any) will be paid to the estate of the deceased Beneficiary in a lump sum upon receipt of the proof of death of the Beneficiary. If there is more than one (1) Beneficiary designated, any surviving Beneficiary(ies) shall continue to receive his/her respective own portion of the Life Insurance Proceeds by installments.
如受益人於支付年期完結前身故，並當本公司被通知及收到有關已故受益人死亡證明後，人壽保險金之未付餘額及積存利息（如有）將會以一筆過的形式支付至其遺產。若有多於一名指定受益人，在生的受益人將繼續獲得他/她各自應佔人壽保險金的分期部分。
- (10) Any installments shall be paid to the Beneficiary(ies) through the Company's designated payment method. The Company reserves the right to change the date and/or method for making payment of the installments.
任何分期形式支付將根據本公司指定的付款形式派發予受益人。本公司保留權利更改支付分期支付之日期及 / 或方式。
- (11) The Designated Date of Life Insurance Proceeds Settlement Option is only applicable to the eligible Policyowners entitled in the previous Designated Date of Life Insurance Proceeds Settlement Option campaign offered from the Company.
人壽保險金指定支付日期選擇只適用於本公司於過往人壽保險金指定支付日期選擇的推廣活動中合資格的保單持有人。
- (12) The terms & conditions are subject to the Company's final decision and may be changed from time to time.
條款及細則須視乎公司最終決定及可能會不時修訂。

Declaration: I HEREBY DECLARE AND AGREE THAT: 1. The above request for application/change/cancellation of Life Insurance Proceeds settlement option will not take effect unless the following conditions are met: (i) Any required documents are submitted in full. (ii) The request is approved by Chubb Life Insurance Hong Kong Limited (hereinafter called "the Company") during the lifetime of the Insured or Insureds. 2. The request for application/change/cancellation of Life Insurance Proceeds settlement option shall be the basis for the application/change/cancellation in the settlement option and will form part of the Policy unless otherwise specified. 3. All statements whether or not written by my own hands are to the best of my knowledge and belief complete and true.

聲明：本人謹此聲明及同意：1. 上述之申請 / 更改 / 取消人壽保險金支付選擇必須符合下列所有條件方能生效：(i) 所有文件皆全數並完整無缺遞交。(ii) 申請在受保人在生時，經安達人壽保險香港有限公司（以下簡稱「貴公司」）批准。2. 此申請 / 更改 / 取消人壽保險金支付選擇之申請書將成為保單申請 / 更改 / 取消人壽保險金支付選擇之根據，並作為保單一部分（若有其他安排除外）。3. 上述一切陳述，不論是否本人親手所寫，就本人所知所信，均為事實之全部並確實無訛。

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 and the Personal Data (Privacy) Ordinance of Hong Kong.

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的《保障資料原則》和《個人資料(私隱)條例》。

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 collect your personal information 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 but is not limited to your personal identification information, contact information, financial information, policy information, claims history, medical and health records.

在我們為閣下提供保單和相關服務(「服務」)的過程中，我們可能會不時收集閣下的個人資料，用於本個人資料收集聲明(「個人資料收集聲明」)中規定的目的。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但不限於閣下的個人身份資料、聯絡資料、財務資料、保單資料、索償歷史、醫療和健康紀錄。

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 (“**relevant persons**”), you confirm you have obtained that relevant person’s consent 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(「有關人士」)，閣下確認已獲得該人的同意，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 your application for the policy, you are required to provide us with the information set out under [Parts I and II of the application]. 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.

作為閣下申請保單的先決條件，閣下需要向我們提供[申請表的第一部分和第二部分]中列出的資料。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 your or the relevant persons’ personal information for any purpose related to the Services, and to communicate with you and the relevant persons for such purposes, which may include without limit:

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、儲存閣下或有關人士的個人資料，並就該目的與閣下和有關人士溝通，可能包括但不限於：

- (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) with your consent, to promote and directly market to you and your related persons; (a) the insurance products and services of the Chubb Limited group of companies; (b) mandatory provident fund-related products/services sponsored by the third party scheme providers connected with us; (c) insurance, financial or investment related products/services, rewards, loyalty, co-branding and/or other privileges programs related to health, wellness, medical, entertainment, media, offered by third party partners appointed by us;
在閣下的同意下，向閣下及閣下的有關人士推廣及直接促銷；(a) 安達集團公司的保險相關產品/服務；(b) 與我們有關聯之第三者計劃供應商所提供的強制性公積金相關產品/服務；(c) 保險、金融或投資相關產品/服務、獎勵、忠誠度、聯合品牌及/或其他由我們指定的第三方合作夥伴提供與健康、醫療、娛樂、媒體相關的優惠計劃；
- (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 requirements imposed by or agreed with government or regulatory bodies or imposed by law 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規定；或訴訟；

- (ix) 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其及保險行業利益的功能及規定；
- (x) to conduct research, 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、數據分析和統計、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
- (xi) 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

我們可能與誰共享閣下的個人資料

We may for the purposes stated in this PICS disclose or transfer your or the relevant persons' personal information, within or outside of Hong Kong, to:

我們可能會就本個人資料收集聲明中所述的目的，在香港境內或境外披露或轉移閣下或有關人士的個人資料至：

- (i) our authorized agents, insurance intermediaries, third party providers or administrators including healthcare providers, in connection with the placement or handling of your insurance policy and any related claims and/or services;
就閣下的保單及任何相關索償及/或服務的安排或處理，獲我們授權的代理人、保險中介人、第三方供應商或管理人員，包括醫療保健供應商；
- (ii) reinsurers, claims investigators, loss adjudicators, fraud investigators, medical advisers, debt recovery agents, credit reference agencies, law enforcement bodies, fraud prevention agencies;
再保險公司；理賠調查公司；理賠調查員；欺詐調查員、醫療顧問、債務追收公司、信貸資料機構、執法機構、防止欺詐機構；
- (iii) any branch, subsidiary, holding company, associated company or affiliates of Chubb Life HK (“**Group Companies**”);
安達人壽香港（「集團公司」）的任何分行、附屬公司、控股公司、聯營公司或聯繫公司；
- (iv) our appointed third-party vendors, agents, contractors, advisers;
我們指定的第三方供應商、代理人、承包商、顧問；及
- (v) insurance industry associations and federations, government or judicial or regulatory bodies, or any person to whom we have a legal or regulatory obligation to make disclosure.
我們有法律或監管義務向其作出披露的保險行業協會和聯會，政府或司法或監管機構，或任何人士。

Your data access rights

閣下查閱資料的權利

You have the right to obtain access to and to request correction of your personal information held by Chubb Life HK or be given reasons for any refusal of access or correction. We may charge you a reasonable fee to process your data access request.

閣下有權查閱和要求更正安達人壽香港持有閣下的任何個人資料，或獲得拒絕查閱或更正的理由。我們可能會向閣下收取合理的費用，以處理閣下的資料查閱要求。

For more details of the Company's policies on personal data 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 data, access to or correction of personal data should be made in writing and submitted to: Data Protection Officer of Chubb Life Insurance Hong Kong Limited at 35/F, Chubb Tower, Windsor House, 311 Gloucester Road, Causeway Bay, Hong Kong.

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、查閱或更正個人資料的任何問題，請以書面形式向安達人壽保險香港有限公司的資料保護主任提出，並送交至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。

In case of discrepancies between the English and Chinese version, the English version shall apply and prevail.

如中英文本有任何歧義之處，概以英文本為準。

Use of Personal Information for Direct Marketing Purposes Statement 使用個人資料於直接營銷用途之聲明

Chubb Life HK intends to use or transfer your and the relevant persons' name, contact information, and policy details (“**Relevant Data**”) for direct marketing of insurance related product and services of our and our Group Companies, mandatory provident fund-related products/services sponsored by the third-party scheme providers connected with us, and/or insurance, financial or investment related products/services, rewards, loyalty, co-branding and/or other privileges programs related to health, wellness, medical, entertainment, media, offered by third party partners appointed by us. In doing so, we may transfer your Relevant Data to our Group Companies and/or our appointed partners, for the purposes of them providing you with promotional communications and materials in relation to their products and/or services. However, we cannot use your Relevant Data without your consent. Please sign at the end of this statement to indicate your consent to such use. Should you find such use of your Relevant Data not acceptable, please indicate your objection by selecting the opt-out box below.

安達人壽香港擬使用或轉移閣下及有關人士的姓名、聯絡資料及保單詳情（「**有關資料**」），以直接促銷我們及我們集團公司的保險相關產品及服務、強制性公積金相關產品 / 由我們相關的第三方計劃提供者贊助的服務，及/或保險、金融或投資相關產品/服務、獎勵、忠誠度、聯合品牌及/或其他由我們指定的第三方合作夥伴提供與健康、醫療、娛樂、媒體相關的優惠計劃。就此，我們可能會將閣下的有關資料轉移給我們的集團公司及/或我們指定的合作夥伴，以便他們向閣下提供與其產品及/或服務相關的推廣資料及刊物。但是，未經閣下的同意，我們不能使用閣下的有關資料。請在本聲明末尾簽名，表示閣下同意該使用。如果閣下不接受對閣下的有關資料的該使用，請別選以下退出空格。

- I do not want Chubb Life HK or the Group Companies to use my Relevant Data for direct marketing purposes.
我不希望安達人壽香港或集團公司將我的有關資料用於直接營銷目的。
- I do not want Chubb Life HK to share my Relevant Data with third party scheme providers for their marketing purposes.
我不希望安達人壽香港與第三方計劃提供者分享我的有關資料以用於他們的營銷目的。
- I do not want Chubb Life HK to share my Relevant Data with third party product/service providers for direct marketing purposes.
我不希望安達人壽香港與第三方產品/服務提供者分享我的有關資料以用於直接營銷目的。

If you have consented to direct marketing but later decide that you no longer wish to receive direct marketing, you may exercise the right to opt-out at any time by writing to: The Data Protection Officer of Life Administration of Chubb Life Insurance Hong Kong Limited at 35/F, Chubb Tower, Windsor House, 311 Gloucester Road, Causeway Bay, Hong Kong.

如果閣下已同意直接營銷，但其後決定不再希望接受直接營銷，閣下可以隨時行使選擇退出的權利，並以書面形式向安達人壽保險香港有限公司壽險行政部的資料保護主任提出，並送交至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。

Signature of Policyowner

保單持有人簽署

(Name 姓名: _____)

Signature must be consistent with that in your policy record.

閣下的簽名模式須與保單記錄相符。

Sign Date

簽署日期

Chubb. Insured.SM