Investment-Linked Policy Services Request Form
投資相連計劃服務申請書

FWD insurance

Please fill in block letters 請以英文正楷填寫
For services not covered by this form (e.g. change of policy ownership), please contact your advisor/our customer service centre.
若要求的服務並不包括在此表格內（例如：更改保單權益人），請與閣下的顧問 / 本公司的客戶服務中心聯絡。
Please darken the appropriate circle 請將適當圓圈填滿 Correct method 正確方法：●

Policy Number 保單號碼		
Personal Information 個人資料	**Life Insured 被保人**	**Policy Owner 保單權益人**
Name 姓名	Family Name 姓氏 Given Name 名	Family Name 姓氏 Given Name 名
○ ID Card No. 身份證號碼 ○ Passport No. / Travel Document No. 護照編號 / 旅遊證件號碼		

IMPORTANT NOTE 重要事項：

Risk Disclosure Statements 風險披露聲明

1 Do not select the investment choices unless you understand how it is suitable for you.
除非你已明白相關投資選擇如何適合你，否則不應選擇該投資。

2 You should select the investment choices for the purposes based on your own decision.
你應該根據個人目的自行決定投資選擇。

3 Please be reminded to visit www.fwd.com.hk to obtain and review the detailed information of risk profile and derivative exposure from the fact sheet and prospectus of the selected underlying investment choices stated in Part A-item 1, item 2 and item 3.
請瀏覽 www.fwd.com.hk，獲取及查閱有關在甲部第一項、第二項及第三項所選相關投資選擇的基金資料匯報及發行章程的風險狀況和衍生工具風險的詳細資料。

4 Please note if there is any material change in the circumstances of yourself or your Risk Profile Questionnaire has expired (which is only valid for 12 months from the date of completion), you are required to re-submit Risk Profile Questionnaire.
請注意如自身情況有重大變更或你的風險狀況問卷已過期（該問卷只有效於完成後的 12 個月），你需要重新提交風險狀況問卷。

5 Please seek professional advice from insurance adviser to conduct risk assessment and complete the Risk Profile Questionnaire if required. The completed Risk Profile Questionnaire must be signed and dated by the Policy Owner and the insurance adviser.
如有需要，請徵詢理財顧問的專業意見以進行風險評估並填寫風險狀況問卷。填妥的風險狀況問卷必須由保單權益人及理財顧問簽署並註明日期。

6. You must understand the nature and risks of the selected underlying investment choices stated in Part A - item 1, item 2 and/or item 3 and has sufficient net worth to be able to assume the risks and bear the potential loses of trading in the selected underlying investment choices.
你必須明白甲部第一項、第二項及 / 或第三項的相關投資選擇的性質及風險，而且確認有能力承受所選擇的相關投資選擇的潛在風險及損失。

7. According to individual circumstances, you may be requested to provide enough and reasonable explanation and an updated Risk Profile Questionnaire to assess and ensure suitability of the investment choices regarding any mismatch of your risk profile, expired or invalid Risk Profile Questionnaire. Otherwise the request will be rejected.
根據個別情況，你可能會被要求提供足夠和合理的解釋及提交風險狀況問卷，以因應不符你風險狀況、過期或無效的風險狀況問卷進行評估和確保你的投資選擇的適合性。否則，該申請將被拒絕。

Derivative Fund 衍生工具基金

8. Please note all investment choices involving derivative fund stated in Part A - item 1, item 2 and item 3 will be rejected if there is any mismatch of latest risk profile, derivative knowledge and/or Risk Profile Questionnaire has expired or invalid. Policy Owner must submit new Risk Profile Questionnaire in order to continue the process only if the updated risk profile and derivative knowledge status match with requirements of the selected investment choices.
請注意如在甲部第一項、第二項及第三項的相關投資選擇中涉及衍生工具基金並與最近風險承擔能力、衍生工具知識有任何不符及 / 或風險狀況問卷已過期或無效，相關投資選擇將被拒絕。保單權益人必須提交風險狀況問卷，並僅在其更新後的風險狀況及衍生工具知識符合相關投資選擇的要求方會繼續執行。

Non-Derivative Fund 非衍生工具基金

9. If all funds in your selected investment choices stated in Part A - item 1, item 2 and item 3 DO NOT involve derivatives but there is mismatch with your latest risk profile or your Risk Profile Questionnaire has expired and you decide to continue your request after you have read the detailed information to understand and evaluate the nature and possible risks associated, you must read and agree with the Disclaimer below each related service item of Part A. Otherwise the request will be rejected.
如果你在甲部第一項、第二項及第三項中所述投資選擇中均不涉及衍生工具基金，但與你最近的風險狀況不符或你的風險狀況問卷已過期，而你經過閱讀相關基金的詳細資料以理解和評估相關性質及潛在風險後仍決定繼續申請，你必須閱讀並同意甲部每個相關服務項目下的聲明。否則，該申請將被拒絕。

Part A: SERVICE ITEMS 甲部: 服務項目

◯ 1. Investment Choice Switching – Existing Holding Investment Choices 投資選擇轉換 – 現行所持有的投資選擇

Minimum 10% for each switching-in Investment Choice & must be multiples of 5%. Minimum switch out amount is currently US$125. The current Investment Choice allocation will remain unchanged, unless changes are specified in Part (2). You may also perform switching and allocate future premium through FWD Life Customer Online Service. Please visit FWD Company website for further details: www.fwd.com.hk.

每項所選投資選擇最少須分配 10% 並須為 5% 的倍數。現行最低投資選擇轉出金額為 125 美元。除非於第 2 項列明更改，否則現有的投資選擇分配將維持不變。你亦可以透過富衛客户網上服務進行投資選擇轉換及未來供款調配。請瀏覽富衛公司網頁了解詳情。

Switch Out 轉出			Switch In 轉入		
Name of Investment Choice 投資選擇名稱	Investment Choice Code 投資選擇代碼	Switch out (%) 轉出百分比	Name of Investment Choice 投資選擇名稱	Investment Choice Code 投資選擇代碼	Allocation (%) 分配百分比
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
				Total 合共 :	100%

Disclaimer 聲明 (For Part A – item 1 involving NO Derivative Fund ONLY 僅適用於當甲部第一項沒有涉及衍生工具基金的情況)

Unless the following confirmation is specified, any of the selected underlying investment choices stated in above that does NOT involve derivative fund but carries a risk level higher than your latest record of risk profile will be rejected 除非閣下作出以下的確認，否則如任何上述的相關非衍生工具投資選擇的潛在風險高於你最近的風險狀況記錄，該申請將被拒絕。

◯ **Despite the fact that the features and/or risk level of my selected underlying investment choices, as stated in above, may not be suitable for me based on my risk profile as indicated in the Risk Profile Questionnaire, I confirm that, after due consideration, it is my independent decision to submit my request(s), without consulting a licensed insurance intermediary, for your processing. 儘管根據本人於「風險狀況問卷」所披露的投資風險概況，本人於上述選擇的相關投資選擇可能並不適合本人，但經過適當考慮後及基於本人的獨立決定，本人確認在不諮詢持牌保險中介人的情況下，提交及執行有關申請。**

◯ 2. Investment Choice Allocation for Future Premium 未來供款調配

Minimum 10% for each Investment Choice & must be multiples of 5%. You may also perform switching and allocate future premium through FWD Life Customer Online Service. Please visit FWD Company website for further details. www.fwd.com.hk.

每項所選投資選擇最少須分配 10% 並須為 5% 的倍數。你亦可以透過富衛客戶網上服務進行投資選擇轉換及未來供款調配。請瀏覽富衛公司網頁了解詳情。

Investment Choice Allocation 投資選擇分配

Name of Investment Choice 投資選擇名稱	Investment Choice Code 投資選擇代碼	Allocation (%) of Future Premium 未來供款調配百分比
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
	Total 合共 :	100%

Disclaimer 聲明 (For Part A – item 2 involving NO Derivative Fund ONLY 僅適用於當甲部第二項沒有涉及衍生工具基金的情況)

Unless the following confirmation is specified, any of the selected underlying investment choices stated in above that does NOT involve derivative fund but carries a risk level higher than your latest record of risk profile will be rejected 除非閣下作出以下的確認，否則如任何上述的相關非衍生工具投 資選擇的潛在風險高於你最近的風險狀況記錄，該申請將被拒絕。

◯ **Despite the fact that the features and/or risk level of my selected underlying investment choices, as stated in above, may not be suitable for me based on my risk Profile as indicated in the Risk Profile Questionnaire, I confirm that, after due consideration, it is my independent decision to submit my request(s), without consulting a licensed insurance intermediary, for your processing. 儘管根據本人於「風險狀況問卷」所披露的 投資風險概況，本人於上述選擇的相關投資選擇可能並不適合本人，但經過適當考慮後及基於本人的獨立決定，本人確認在不諮詢持牌保險中介人的 情況下，提交及執行有關申請。**

○ 3. Add Booster Investment Premium 新增額外投資保費

1. Please submit Financial Needs and Investor Profile Analysis Form, Risk Profile Questionnaire, Important Facts Statement and Applicant's Declaration. Acceptance of this application is subject to satisfactory completion of the submitted documents. 請遞交財務需要及投資取向分析表格、風險狀況問卷、重要資料聲明書及投保人聲明書。申請之批核將視乎所有遞交文件之完整性。
2. Minimum 10% for each Investment Choice & must be multiples of 5%. 每項所選投資選擇最少須分配 10% 並須為 5% 的倍數。
3. Please note the minimum and maximum Booster Investment Premium requirement for each product. Please refer to the relevant product brochure for details. 請注意各項產品之最低及最高額外投資保費要求。詳情請參閱相關的產品介紹。

Booster Investment Premium 額外投資保費	HK$/US$ 港元 / 美元 ______________________

Investment Choice Allocation 投資選擇分配

Name of Investment Choice 投資選擇名稱	Investment Choice Code 投資選擇代碼	Allocation (%) of Booster Investment Premium 額外投資保費分配百分比
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
	Total 合共 :	**100%**

Disclaimer 聲明 (For Part A – item 3 involving NO Derivative Fund ONLY 僅適用於當甲部第三項沒有涉及衍生工具基金的情況)

Unless the following confirmation is specified, any of the selected underlying investment choices stated in above that does NOT involve derivative fund but carries a risk level higher than your latest record of risk profile will be rejected 除非閣下作出以下的確認，否則如任何上述的相關非衍生工具投資選擇的潛在風險高於你最近的風險狀況記錄，該申請將被拒絕。

○ **Despite the fact that the features and/or risk level of my selected underlying investment choices, as stated in above, may not be suitable for me based on my risk profile as indicated in the Risk profile Questionnaire, I confirm that, after due consideration, it is my independent decision to submit my request(s), without consulting a licensed insurance intermediary, for your processing. 儘管根據本人於「風險狀況問卷」所披露的投資風險概況，本人於上述選擇的相關投資選擇可能並不適合本人，但經過適當考慮後及基於本人的獨立決定，本人確認在不諮詢持牌保險中介人的情況下，提交及執行有關申請。**

○ 4. Change of Payment Mode 更改付款方式

○ Yearly by Cash / Autopay* 每年現金 / 自動轉賬 * 支付
○ Half-yearly by Cash / Autopay* 半年現金 / 自動轉賬 * 支付
○ Monthly Autopay* (on 3rd of each month) 每月 3 號自動轉賬 *
○ Monthly Autopay* (on 25th of each month) 每月 25 號自動轉賬 *
○ Monthly Autopay* by Credit Card 每月信用卡自動轉賬 *

(*Please submit the Direct Debit/Credit Card Authorization Form at the same time. 請連同「直接付款 / 信用咭付款授權書」一起呈交)

○ 5. Regular Investment Premium 定期投資保費

1. To add or increase regular investment premium, please submit Financial Needs and Investor Profile Analysis Form, Risk Profile Questionnaire, Important Facts Statement and Applicant's Declaration. Acceptance of this application is subject to satisfactory completion of the submitted documents. 新增或增加每期定期投資保費，請遞交財務需要及投資取向分析表格、風險狀況問卷、重要資料聲明書及投保人聲明書。申請之批核將視乎所有遞交文件之完整性。
2. The option to add or increase Regular Investment Premium is only applicable to specific products. 新增或增加每期定期投資保費只適用於個別產品。
3. Please note the minimum and maximum Regular Investment Premium requirement of each product. Please refer to the relevant product brochure for details. 請注意各項產品之最低及最高定期投資保費要求。詳情請參閱相關的產品介紹。

○ Add Regular Investment Premium 新增定期投資保費		HK$/US$ 港元 / 美元 ______________________
○ Change of Amount 更改金額	Original Regular Investment Premium 原有每期投資保費	HK$/US$ 港元 / 美元 ______________________
	New Regular Investment Premium 新每期投資保費	HK$/US$ 港元 / 美元 ______________________
○ Suspend of Regular Investment Premium 暫停定期投資保費		

○ 6. Investment Choice Withdrawal 投資選擇提取

Please submit a copy of the identification document of the Policy Owner together with this form. Please note the Investment Choice withdrawal requirement of each product. Please refer to relevant product brochure for details. 請隨此申請書一併遞交保單權益人之身份證明文件副本。請注意各項產品之投資選擇提取要求。詳情請參閱相關的產品介紹。

○ Investment Choice Partial Withdrawal 投資選擇部份提取

Name of Investment Choice 投資選擇名稱	Investment Choice Code 投資選擇代碼	Percentage of Investment Choice Withdrawal 提取投資選擇百分比		
		Initial Contribution Account 最初供款戶口	Accumulation Contribution Account 累積供款戶口	i.BestFund Rider Account 愛繽紛附約戶口
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%

○ **Termination of i.BestFund Rider 終止愛繽紛附約**
All Investment Choice units will be redeemed and withdrawn 提取並贖回所有投資選擇單位

Payment instruction 付款指示

○ Issue HK$ Cheque 發出港元支票

○ Issue Policy Currency Cheque 發出保單貨幣支票

○ Deliver through adviser 由理財顧問交予本人

○ Post to correspondence address 寄往本人之通訊地址

○ Other instructions 其他指示 (Please specify in details 請詳細說明)

○ Faster Payment System (“FPS”)
(the FPS account must be registered under the policy owner) **
快速支付系統 「轉數快」(「轉數快」的註冊用戶必須 為保單持有人)**
Please provide either one of below Proxy ID 請提供下列其中一種識別代號

○ Mobile number 手機號碼：____________________

○ Email 電郵：____________________

○ FPS identifier 「轉數快」識別碼：____________________

** Remarks 註
i. This option is **NOT** applicable to: 此選項**不適用**於：
(a) Investment choice withdrawal amount over HK$300,000 投資選擇提取金額高於港幣三十萬元；
(b) Payee is different from policyowner. 收款人與保單權益人不同。
ii. The amount of investment choice withdrawal will be paid by cheque if the payment by FPS is unsuccessful for any reasons, including a wrong/ invalid “Proxy ID” has been provided.
如因任何原因未能透過「轉數快」成功支付投資選擇價值提取金額，包括所提供的「識別代號」錯誤 / 無效，投資選擇價值提取金額將以支票形式支付。

○ **Direct Credit to specified bank account#**
(Only applicable to Policy Owner’s/Policyholder’s HK$ bank account in Hong Kong)
直接存入指定銀行帳戶 #
(只適用於保單權益人 / 保單持有人之香港港幣銀行戶口)

_ _ _ – _ _ _ – _ _ _ _ _ _ _ _ _

Bank No. 銀行編號 **Branch No. 分行編號** **Account No. 帳戶號碼**

Remarks 註
i **A copy of bank book or bank statement MUST be provided,** unless the bank account is the same as the one registered for DDA for premium payment. 除非銀行帳戶為保費自動轉帳戶，否則**必須提供銀行存摺或月結單副本**。
ii This option is **NOT** applicable to investment choice withdrawal amount over HK$3,000,000. 此選項不適用於投資選擇價值提取金額高於港幣三百萬元。

○ 7. Temporary Suspension of Premium / Premium Holiday 暫停保費 / 保費假期

Please note the Temporary Suspension of Premium / Premium Holiday requirement of each product 請注意各項產品之暫停保費 / 保費假期要求。

○ Apply 申請 ○ Release 取消	The change will be effective on Next Premium Due Date 有關更改將於下個保費到期日生效

Notes 備註 :

1. During Premium Holiday or Premium Suspension, the Company will redeem Units to pay all relevant charges, any Basic Premium and the premiums of any riders attached hereto. Please refer to Policy Provisions for details. 當行使保費假期或暫停保費，公司會從保單戶口內贖回單位以扣除保單的所有相關費用、基本計劃保費及附約保費（如適用）。詳情請參閱保單條款。
2. When the account value is insufficient to cover the deduction of relevant charges and premium, or below the minimum Account Value requirement, this Policy will be terminated. 當戶口價值不足以繳付所有有關費用及保費，或低於最低戶口結餘要求時（如適用），此保單將自動失效。
3. Investment-Linked policy is intended to be a long-term investment, any premium holiday taken may result in significant losses to the account of the Policy and the contribution bonuses awarded. Please refer to Product Brochure for details. 投資相連計劃是以長線投資為目標，保單戶口價值及供款獎賞可能因行使保費假期而蒙受重大損失。詳情請參閱產品介紹。
4. When the policy is exercising premium holiday, the levy for any rider attached to the policy will be deducted from the value of Policy Account. 如保單行使保費假期，本公司會於保單價值內扣除任何保單附約的徵費。

○ 8. Cash Dividend Payment Option 現金派息收取方式

○ Direct Credit to Policy Owner's HKD Account - Account Details* (Applicable to HKD account in Hong Kong Only. Joint account is not applicable)
直接入賬保單權益人的港幣銀行戶口 - 戶口資料 * (只適用於香港之港幣銀行戶口,聯名戶口並不適用)

Account No. 賬戶號碼 ___ — ___ — ___

Bank No. 銀行編號 **Branch No. 分行編號** **Account No. 帳戶號碼**

* Remarks 註
i. A copy of bank book or bank statement MUST be provided, unless the bank account is the same as the one registered for DDA for premium payment.
除非銀行帳戶為保費自動轉帳戶口，否則必須提供銀行存摺或月結單副本。

○ Issue Hong Kong Dollar Cheque 發出港幣支票

○ Issue Policy Currency Cheque 發出保單貨幣支票

Notes 注意事項 :
If your policy's currency is not in HKD, please note that the amount payable will be in HKD equivalent of policy's currency based on a market-based currency exchange rate of policy's currency to HKD, as solely determined by the Company from time to time. Any fluctuations in exchange rate of policy's currency to HKD will have a direct impact on the value as calculated in HKD.
若 閣下的保單貨幣並非港幣，有關分派金額將會根據市場保單貨幣兌港幣之匯率，以保單貨幣同等價值的港幣分派，而匯率將會由公司不時更新。任何保單貨幣兌港幣匯率之波動將會直接影響以港幣計算的價值。

Part B: Reinstatement and Health Questions 乙部: 保單復保及健康問卷

○ **Reinstatement 保單復保**

Please answer the below health questions for reinstatement. If your basic plan is an i.KnowU regular plan or is attached with any riders (except Parent Risk Rider), please submit a Policy Service Request Form and complete Part B therein.
請填妥以下健康問卷作保單復保申請。如閣下的基本計劃為愛識理定期計劃或附有保險附約 (除父母保障附約外) 之保單，請遞交更改保單合約內容申請書並填妥該申請書之乙部。

Personal Health Statement 健康狀況聲明	Life Insured 被保人	Policy Owner 保單權益人
1 Have you ever had, or been told you had or have been treated for HIV infection, Acquired Immunodeficiency Syndrome (AIDS), AIDS-related disease, cardiovascular disease, digestive disease, kidney disease, liver disease, respiratory disease, muscular-skeletal disorder, mental disorder, nervous system disorder, Cancer and Tumor in past 2 years? 在過去兩年，閣下是否曾患有或獲悉患有 HIV 感染，後天免疾力缺乏症 (愛滋病)，愛滋病併發症，心血管疾病，消化系統疾病，腎臟疾病，肝臟疾病，呼吸系統疾病，肌肉骨骼疾病，精神病，神經系統疾病，癌症，腫瘤或曾因上述疾病接受治療？	○ Yes 是 ○ No 否	○ Yes 是 ○ No 否
2 In the past 2 years, have you ever had any other disease not mentioned above which require examination, treatment or hospitalization for more than seven days? 在過去兩年，閣下曾否因上述以外之其他疾病，而需要接受檢查、治療或住院七日或以上？	○ Yes 是 ○ No 否	○ Yes 是 ○ No 否
3 Are you currently receiving medical treatment or under medical care of any kind or have been advised / scheduled to have operation, diagnostic test or treatment by a physician in near future? 閣下是否正接受任何藥物治療、醫療護理或於不久將來，由醫生建議或正在安排外科手術、診斷檢查或治療？	○ Yes 是 ○ No 否	○ Yes 是 ○ No 否

For any **"Yes"** answer above, please circle the items concerned, state dates, diagnosis, duration, results, stage of recovery, name and address of all attending physicians. 若上述任何題目之答案為**「是」**者，請圈出有關項目。並註明日期、診斷、患病時間、測試結果或是否已痊癒，與及所有醫生的姓名和地址。

Collection of Levy by the Insurance Authority ("IA")

With effect from 1 January 2018, Levy collected by the Insurance Authority will be imposed on relevant policy at the applicable rate. For further information, please visit www.fwd.com.hk or contact: (852) 3123 3123.
For policy services requests that involve payment of premium, please be reminded to pay the levy as well.

保險業監管局 (「保監局」) 收取的保費徵費
由 2018 年 1 月 1 日起，保費徵費將按照當時徵費率於相關保單收取。如有任何查詢，請瀏覽 www.fwd.com.hk 或致電：(852) 3123 3123。
如更改保單合約內容申請涉及保費繳付，請同時繳交保費徵費。

Disclaimer 免責聲明

Investment Choice Switching - Existing Holding Investment Choice
The instruction will change the investment portfolio in your Policy Account. Notional units of the Investment Choice allocated to your Policy Account will be switched out in accordance with your instruction in order to switch to the designated Investment Choice. Investment Choice allocation of future regular premiums will remain unchanged. Subject to the Company's approval process, we will execute your Investment Choice switching instructions as soon as practicable.
投資選擇轉換 - 現行所持有的投資選擇
此項指示將更改現有保單戶口內的投資組合。您保單戶口內的投資選擇名義單位將會依照您的指示相應地出轉出，然後再轉入至指定的投資選擇。未來供款之投資選擇分配將維持不變。 在符合本公司的批核程序下，我們會在切實可行的範圍內盡快執行閣下轉換投資選擇的指示。

Investment Choice Allocation for Future Premium
This instruction will change the premium allocation instruction of your future regular premiums. The existing Investment Choice balances of your Policy Account will remain unchanged. Subject to the Company's approval process, we will execute your Investment Choice allocation for Future Premium instructions as soon as practicable.
未來供款調配
此項指示將更改日後新繳交定期保費的投資選擇之投資分配。現有保單戶口內的投資選擇名義單位結餘則維持不變。在符合本公司的批核程序下，我們會在切實可行的範圍內盡快執行閣下調配未來供款之投資分配的指示。

By providing this service, we are not inviting or recommending any person or entity to invest. The information should not be construed as a prospectus for the purchase or sale of such investment.
本公司提供以上服務並不是邀請或建議任何人或任何機構進行投資。有關資訊不應被視作為購買或銷售有關投資的說明書。

Investment involves risk, past performance figures are not indicative of future performance. As a consequence of the general nature of varied investments and possible exchange or interest rate fluctuations, the value of investments and their yield may go down as well as up.
投資涉及風險，過往投資選擇表現不可作為未來表現的指標。投資選擇屬多元化投資，加上匯價及利率的波動，故投資價值及收益可跌亦可升。

The Company is entitled to reject any Investment-Linked Policy Services Request which is not completed in full and delivered together with payment and the requested documents.
本公司有權拒絕受理任何並未完全填妥及未附上應付款項及所要求文件之投資相連計劃服務申請。

FWD reserves the right to request additional personal information or supporting document to complete this policy change request.
富衛保留索取額外個人資料及證明文件用作保單更改的權利。

Declaration 聲明

I confirm and understand that the said policy is an Investment-Linked Insurance Plan or attached with Investment-Linked Rider(s), the Investment Choice Withdrawal Benefit will be the number of Units in the Policy Account multiplied by the Unit Price of the respective Investment Choices with all outstanding unpaid charges and Early Redemption Charge deducted (if any). I am personally responsible for the investment loss related to the transaction.
本人確認及理解上述保單是投資相連計劃或帶有投資相連附約，投資選擇提取權益將為保單戶口內投資選擇單位數量乘以有關投資選擇單位價格，並須扣除所有待繳費用及提早贖回費。本人會承受所有相關的投資損失。

I confirm and understand that except for those specified in a Policy Service Request Form or notified to FWD in previous written requests, there are no changes to my personal particulars including but not limited to occupation, nationality and personal address since the application for this insurance policy.
本人確認及理解除非已列明於並附上更改保單合約內容申請書或已書面上知會富衛，本人的個人資料(包括但不限於職業，國籍及個人地址)與申請此保險計劃時相同。

I have read and understood the principal brochure of the Investment Linked Plan/Rider before signing this Investment-Linked Policy Services Request form.
本人在簽署此服務申請書前已詳閱及完全明白投資相連計劃 / 附約的有關主要推銷刊物。

☐ **I CONFIRM this Investment-Linked Policy Services Request Form is signed in Hong Kong.**
本人確認此投資相連服務申請書在香港簽署。

I/we have read, understood and accepted the Personal Information Collection Statement ("PICS") attached to this form.
The Company intends to send you marketing communications or materials and use Your Personal Data in accordance with paragraphs 8 & 9 above. If you agree to receive such marketing communications or the Company's intended use of Your Personal Data, please tick (✓) below.
本人 / 我們已閱讀、明白及接受此表格附載的收集個人資料聲明。
本公司有意向閣下送交推廣訊息或資料及根據上述第 8 及第 9 段使用閣下的個人資料。如閣下同意接收有關的推廣訊息或本公司擬對閣下的個人資料的使用，請在以下有關方格內加上剔 (✓) 號。

☐ **I agree to receive marketing communications or materials and the Company's intend use of my personal data.**
本人同意接收推廣訊息或資料及本公司擬對本人的個人資料的使用。

Date 簽署日期	Signature of Life Insured 被保人簽署	Signature of Policy Owner 保單權益人簽署	Signature of Witness 見証人簽署
Day 日 / Month 月 / Year 年	S. V	S. V.	

For Assignee Use Only (if applicable) 受讓人專用（如適用）

I / We, the assignee of the policy, hereby consent and agree the Policy Owner for applying the above policy change request(s). 本人，保單受讓人，特此確認得悉及同意保單持有人提交以上保單更改申請。 Payment Instruction (Applicable for investment choice withdrawal request only) : 付款指示（只適用於投資選擇提取申請）：	Signature of Assignee 受讓人簽署 Signature Date 簽署日期 Day 日 / Month 月 / Year 年 2 0

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

Fax no. for submitting Investment-Linked Policy Services Request Form : (852)2290-7022
遞交投資相連計劃服務申請書傳真號碼 : (852)2290-7022

For Office Use Only
本公司專用

Adviser Name 理財顧問姓名	Adviser Location 地區	Adviser Code 理財顧問號碼	% Share 百份比之分配	Adviser's Signature 理財顧問簽署
1.				
2.				

Personal Information Collection Statement (“PICS”)
收集個人資料聲明

The terms “personal data”, “direct marketing”, and “processing” used in this Personal Data Collection Statement shall bear the meanings as assigned to such terms in the Personal Data (Privacy) Ordinance (PDPO). We may collect or obtain, hold and use, your personal data provided in this form for (i) assessing, processing, verifying and determining your eligibility to apply for the policy or services, (ii) contacting you to inform you of the outcome of your application, (iii) carrying out direct marketing activities in accordance with your consent given in the “Direct Marketing” section in the application form (in compliance with the relevant requirements of Part 6A of the PDPO), (iv) compilation of statistical and actuarial information and research and training purposes, and (v) any other directly related purposes pertaining to any of the above, or other purposes agreed by you. We may disclose or transfer (whether within or outside Hong Kong) your personal data to our Agents or authorized insurance intermediaries or third party service providers for or in relation to the aforesaid purposes. We keep your personal data only for a period reasonably necessary for any of the purposes set out above or as prescribed or permitted by the applicable laws and regulations. If you do not provide the required personal data, we will be unable to process your application for the policy or respond to any request, enquiry or complaint, as the case may be. A Privacy Addendum under the Mainland China data protection laws supplementing this PICS applies to you if you are within mainland China. The updated version of company PICS is available for download from our website: www.fwd.com.hk, and is made available upon request.

本個人資料收集聲明中使用的“個人資料”、“直接促銷”、及“處理”具有個人資料（私隱）條例 (“條例”) 中規定的含義。我們收集或索取，並持有閣下的個人資料用以：(i) 評估、處理、核責及決定閣下申請本計劃或服務的資格： (ii) 與閣下聯繫，告知申請結果；(iii)（在符合條例第 6A 部的相關要求下）按閣下在以下“直接促銷條款”內給予的同意，不時向閣下進行直接促銷活動： (iv) 彙編統計和精算資料以及研究目的：及 (v) 與上述任何目的直接有關的其他相關目的或閣下同意的其他目的。我們可根據上述的目的，向我們的代理或授權保險中介人或第三方服務供應商提供該有關個人資料（不論在香港境內或境外）。我們只會為上述所列出的目的，或適用的法例及法規所訂明或許可的目的，將閣下的個人資料保存一段合理的時間。若閣下未能提供個人資料，將可能導致我們未能處理閣下的申請，或我們未能跟進閣下之要求、查詢及投訴，視情況而定。若閣下位於中國大陸，則根據中國大陸資料保護法補充本聲明的私隱附錄適用於閣下。本公司個人資料收集聲明的最新版本可於以下網址下載： www.fwd.com.hk，及可向本公司索取。