

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。

Data Protection 資料保護

I confirm that I have read and understood the Personal Information Collection Statement ("PICS") of FWD attached hereto. I declare and agree that all the personal information relating to me in this request form may be collected, obtained or held by FWD by any means in accordance with the PICS.

本人確認本人已閱讀及明白隨附之富衛收集個人資料聲明（「收集個人資料聲明」）。本人聲明及同意富衛可根據收集個人資料聲明以任何方式收集、取得或保存所有本人於本申請表內提供的個人資料。

Date 簽署日期 _____ Month 月 Day 日 Year 年	Signature of Life Insured 被保人簽署 <div style="text-align: center;">S. V.</div>	Signature of Policy Owner 保單權益人簽署 <div style="text-align: center;">S. V.</div>	Signature of Witness 見證人簽署
--	--	--	---------------------------------------

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 百分比之分配	Adviser's Signature 理財顧問簽署
1. _____	_____	_____	_____	
2. _____	_____	_____	_____	

Personal Information Collection Statement ("PICS")

1. From time to time, it is necessary for you to supply **FWD Life Insurance Company (Bermuda) Limited** (the "Company") or agents and representatives acting on its behalf with personal information and particulars in connection with our services and products. Failure to provide the necessary information and particulars may result in the Company being unable to provide or continue to provide these services and products to you.
2. The Company may also generate and compile additional personal data using the information and particulars provided by you. All personal data collected, generated and compiled by the Company about you from time to time is collectively referred to in this PICS as "Your Personal Data".
3. "Your Personal Data" will also include personal data relating to your dependents, beneficiaries, authorised representatives and other individuals in relation to which you have provided information. If you provide personal data on behalf of any person you confirm that you are either their parent or guardian or you have obtained that person's consent to provide that personal data for use by the Company for the purposes set out in this PICS.
4. As detailed in this PICS, Your Personal Data may also be processed by the Company's subsidiaries, holding companies, associated or affiliated companies and companies controlled by or under common control with the Company (collectively, "the Group").
5. The purposes for which Your Personal Data may be used are as follows:
 - (i) providing our services and products to you, including administering, maintaining, managing and operating such services and products;
 - (ii) processing, assessing and determining any applications or requests made by you in connection with our services or products and maintaining your account with the Company;
 - (iii) developing insurance and other financial services and products;
 - (iv) developing and maintaining credit and risk related models;
 - (v) processing payment instructions;
 - (vi) determining any indebtedness owing to or from you, and collecting and recovering any amount owing from you or any person who has provided any security or other undertakings for your liabilities;
 - (vii) exercising any rights that the Company may have in connection with our services and/or products;
 - (viii) carrying out and/or verifying any eligibility, credit, physical, medical, security, underwriting and/or identity checks in connection with our services and products;
 - (ix) any purposes in connection with any claims made by or against or otherwise involving you in respect of any of our services or products, including, making, defending, analysing, investigating, processing, assessing, determining, responding to, resolving or settling such claims;
 - (x) performing policy reviews and needs analysis (whether or not on a regular basis);
 - (xi) meeting disclosure obligations and other requirements imposed by or for the purposes of any laws, rules, regulations, codes of practice or guidelines (whether applicable in or outside Hong Kong) binding on the Company or any other member of the Group, including making disclosure to any legal, regulatory, governmental, tax, law enforcement or other authorities (including for compliance with sanctions laws, the prevention or detection of money laundering, terrorist financing or other unlawful activities) or to any self-regulatory or industry bodies such as federations or associations of insurers;
 - (xii) for statistical or actuarial research undertaken by the Company or any member of the Group; and
 - (xiii) fulfilling any other purposes directly related to (i) to (xii) above.
6. Your Personal Data will be kept confidential, but to facilitate the purposes set out in paragraph 5 above, the Company may transfer, disclose, grant access to or share Your Personal Data with the following:
 - (i) other members of the Group;
 - (ii) any person or company carrying on insurance-related and/or reinsurance-related business which is engaged by the Company in connection with the Company's business;
 - (iii) any physicians, hospitals, clinics, medical practitioners, laboratories, technicians, loss adjusters, risk intelligence providers, claims investigators, legal advisors and/or other professional advisors engaged in connection with the Company's business;
 - (iv) any agent, contractor or service provider providing administrative, distribution, credit reference, debt collection, telecommunications, computer, call centre, data processing, payment processing, printing, redemption or other services in connection with the Company's business; and/or
 - (v) any official, regulator, ministry, law enforcement agent or other person (whether within or outside Hong Kong) to whom the Company or another member of the Group is under an obligation or otherwise required or expected to make disclosures under the requirements of any law, rules, regulations, codes of practice or guidelines (whether applicable in or outside Hong Kong).

7. Your Personal Data may be transferred or disclosed to any assignee, transferee, participant or sub-participant of all or any substantial part of the Company's business.
8. The Company is only allowed to (i) use Your Personal Data in direct marketing; or (ii) provide Your Personal Data to another person or company for its use in direct marketing, if you provide your consent or do not object in writing.
9. In connection with direct marketing, the Company intends:
 - (i) to use your name, contact details, services and products portfolio information, financial background and demographic data held by the Company from time to time in direct marketing to market the following classes of services and products offered by the Company, other members of the Group and/or Our Business Partners (being providers of the product and services described below) from time to time:
 - a. insurance services and products;
 - b. wealth management services and products;
 - c. pensions, investments, brokering, financial advisory, credit and other financial services and products;
 - d. health-check and wellness services and products;
 - e. media, entertainment and telecommunications services;
 - f. reward, loyalty or privileges programmes and related services and products; and
 - g. donations and contributions for charitable and/or non-profit making purposes; and
 - (ii) to provide your name and contact details to any members of the Group and/or Our Business Partners for their use in direct marketing the classes of services and products described in paragraph 9(i) above (including, in the case of Our Business Partners, for money or other commercial benefit).

If you do NOT wish the Company to use Your Personal Data in direct marketing or provide Your Personal Data to other members of the Group and/or Our Business Partners for their use in direct marketing (in paragraph 9 above) please tick below to exercise your right to opt-out.

Please do not send direct marketing information to me.

Please do not provide my personal data to other persons or companies for their use in direct marketing.

10. You may also write to the Company at the address below to opt out from direct marketing at any time.
11. To facilitate the purposes set out in paragraphs 5 and 9 above, the Company may transfer, disclose, grant access to or share Your Personal Data with the parties set out in paragraphs 6 and 9(ii) and you acknowledge that those parties may be based outside Hong Kong and that Your Personal Data may be transferred to places where there may not be in place data protection laws which are substantially similar to, or serve the same purposes as, the Personal Data (Privacy) Ordinance.
12. Under the Personal Data (Privacy) Ordinance you have the right to request access to Your Personal Data held by the Company and request correction of any of Your Personal Data which is incorrect and the Company has the right to charge you a reasonable fee for processing and complying with your data access request.
13. Requests for access to or correction of Your Personal Data should be made in writing to:

Corporate Data Protection Officer
FWD Life Insurance Company (Bermuda) Limited
1st Floor, FWD Financial Centre,
308 Des Voeux Road Central
Hong Kong

Should you have any queries, please do not hesitate to call our Customer Service Hotline on 3123 3123.
14. In case of discrepancies between the English and Chinese versions of this PICS, the English version shall apply and prevail.
15. The Company reserves the right, at any time effective upon notice to you, to add to, change, update or modify this PICS.

I have read, understand and accept this PICS. I consent to the transfer of my personal data outside Hong Kong and I understand my personal data may not be protected to the same or similar level in Hong Kong.

Signature: _____

Name: _____
(Name of applicant/individual to whom this PICS is given)

HKID/Passport number: _____

收集個人資料聲明

- 閣下需要不時向富衛人壽保險(百慕達)有限公司(「本公司」)或本公司的代理及代表就本公司的服務及產品提供個人資料及詳情。如未能提供所需資料及詳情,可能會導致本公司無法向閣下提供或繼續提供有關服務及產品。
- 本公司亦可以利用閣下提供的資料及詳情製作及匯編額外的個人資料。本公司不時收集、製作及匯編的所有個人資料,以下統稱為「閣下的個人資料」。
- 「閣下的個人資料」亦包括由閣下提供有關閣下的受養人、受益人、獲授權代表及其他人士的資料。如閣下代表他人提供個人資料,閣下確認閣下乃是他們的父母或監護人或閣下已取得有關人士之同意提供有關人士之個人資料予本公司作本聲明之用途。
- 如本聲明所述,閣下的個人資料亦可能被本公司的附屬公司、控股公司、聯營或聯屬公司或本公司控制的公司或與本公司受共同控制的公司(統稱「本集團」)處理。
- 閣下的個人資料可能用於以下用途:
 - 向閣下提供本公司的服務及產品包括管理、維持、處理及運作有關服務及產品;
 - 處理、評估及決定閣下就本公司的服務或產品而提出的任何申請或要求,以及維持閣下在本公司的賬戶;
 - 發展保險及其他金融服務及產品;
 - 發展及維持本公司信貸及風險之相關模型;
 - 處理付款指示;
 - 釐訂任何欠付閣下或閣下所欠的負債,及向閣下或任何為閣下的債務提供擔保或其他承諾的人士收取及追討欠款;
 - 行使與本公司的服務及/或產品有關的任何權利;
 - 就本公司之服務及產品作出資格、信貸、身體、醫療、擔保、承保及/或身份核証;
 - 用於任何因本公司的產品或服務而由閣下提出或本公司對閣下提出的申索,包括作出、抗辯、分析、調查、處理、評核、決定、回應、解決或和解有關申索;
 - 進行保單審閱及需求分析(不論是否定期進行)
 - 本公司或本集團的其他成員根據任何法律、規則、規例、實務守則或指引(不論在香港境內或境外適用)要求而須作出披露,包括向任何法定機構、監管機構、政府機構、稅務機構、執法機構或其他機構(包括為遵守制裁法、避免或偵查洗錢、恐怖分子資金籌集或其他不法活動)或向任何獨立監管或行業團體(如保險業聯會或協會等)作出披露;
 - 作本公司或本集團的任何成員的統計或精算研究;及
 - 履行與上文第(i)至(xii)段直接有關的其他用途;
- 閣下的個人資料將被保密但為達成上文第5段列出的用途,本公司可能將閣下的個人資料轉移、披露、讓其查閱或與以下各方共同使用:
 - 本集團的其他成員;
 - 任何因本公司業務而聘用之經營保險相關及/或再保險相關業務之人士或公司;
 - 任何因本公司業務而聘用的治療師、醫院、診所、醫生、化驗所、技師、損失理算人、風險情報供應商、索賠調查人、法律顧問及/或其他專業顧問;
 - 任何向本公司之業務提供行政、分銷、信貸資料庫、債務追討、電訊、電腦、熱線中心、資料處理、付款處理、印刷、贖回或其他服務的代理人、承包商或服務供應商;及/或;
 - 任何本公司或本集團的其他成員負有責任或需要或預期要根據任何法律、規則、規例、實務守則或指引(不論在香港境內或境外適用)作出披露的官員、規管者、部門、執法代理或其他人士(不論在香港境內或境外)。

- 閣下的個人資料可能被轉移或披露予任何承讓人、受讓人、本公司業務的任何實質部分的參與人或次參與人。
 - 本公司只可在閣下作出書面同意或不反對的情況下(i)使用閣下的個人資料作直接促銷用途,或(ii)將閣下的個人資料提供予其他人士或公司作其直接促銷用途。
 - 就直接促銷而言,本公司擬:
 - 使用本公司不時持有的閣下姓名、聯絡資料、服務及產品組合資料、財務背景及人口統計資料作直接促銷用途;銷售本公司、本集團其他成員及/或本公司之業務夥伴(即以下產品及服務的供應商)不時提供的下列服務及產品:
 - 保險服務及產品;
 - 財富管理服務及產品;
 - 退休金、投資、經紀、財務諮詢、信貸及其他金融服務及產品;
 - 健康檢查及健康服務及產品;
 - 媒體、娛樂及電信服務;
 - 獎賞、客戶忠誠或優惠計劃及相關服務及產品;及
 - 為慈善及/或非牟利用途的捐款及捐贈。
 - 將閣下的姓名及聯絡資料提供予本集團任何成員及/或本公司之業務夥伴,讓其用於直接促銷上文第9(i)段所載的服務或產品(如為業務夥伴,則包括作金錢或其他商業利益)。若閣下不希望本公司使用閣下的個人資料,或將閣下的個人資料提供予本集團的其他成員及/或本公司的業務夥伴作直接促銷用途(上文第9段),請在以下有關方格內加上剔(✓)號,藉以行使閣下不同意此項安排的權利。
 請不要將直接促銷資料發給本人。
 請不要將本人的個人資料提供予其他人士或公司作其直接促銷用途。
- 閣下亦可於任何時間致函本公司以下地址,藉以拒絕直接促銷。
- 為達成上文第5及第9段所列出的目的,本公司可能將閣下的個人資料轉移、披露、讓其查閱或與上文第6及第9(ii)段所列的各方共同使用及閣下知悉有關一方可能設在香港以外的地方及閣下的個人資料可能被轉往的地方未必設有與《個人資料(私隱)條例》大致相同或用作同一用途的資料保護法。
- 根據《個人資料(私隱)條例》,閣下有權要求查閱本公司所持有閣下的個人資料,並要求改正閣下的不正確個人資料及本公司有權就處理及進行閣下的查閱資料要求而收取合理費用。
- 查閱或改正閣下的個人資料要求,應以書面形式向下列人士提出:

資料保護主任
富衛人壽保險(百慕達)有限公司
香港德輔道中308號富衛金融中心1樓

如閣下有任何疑問,敬請致電本公司之客戶服務熱線3123 3123。
- 中英文本如有歧異,概以英文本為準。
- 本公司保留隨時增補、更改、更新及修訂本聲明之權利,並任何更改將於發出通知時起生效。
- 本人已細閱及本人明白及接受本收集個人資料聲明。本人同意把本人的個人資料轉移至香港境外,並本人明白本人的個人資料未必可以獲得與在香港相同或類似程度的保障。
- 簽名: _____
- 姓名: _____
- (申請人/ 獲發本聲明人士姓名)
- 香港身份證/ 護照編號: _____