保單更改申請表（非財務相關）
Request for Policy Change (Non-Financial Related)

PSF-NFC

持牌保險中介人資料 Licensed Insurance Intermediary's Information		
持牌保險中介人編號 Licensed Insurance Intermediary Code	**持牌保險中介人姓名（姓氏先行） Licensed Insurance Intermediary's Name (Surname First)**	**持牌保險中介人聯絡電話號碼 Licensed Insurance Intermediary's Contact Phone No.**

保單資料 Policy Information		
保單號碼 Policy No.	**保單持有人姓名（姓氏先行） Policy Owner's Name (Surname First)**	**保單持有人聯絡電話號碼 Policy Owner's Contact Phone No.**

注意事項 Notes

1. 請在適當方格內加上 ✓ 號，並用正楷填寫。
2. 保單持有人 / 受保人 / 承讓人 / 不可撤換受益人（如適用）之簽署必須與中國太平洋人壽保險（香港）有限公司（以下簡稱「太保壽險香港」或「本公司」）之存檔相符，並必須在此表格內任何更改或修改的地方以完整簽署作實。切勿在空白表格或尚未填妥的表格上簽署。
3. 請於簽署日起計 30 天內遞交至本公司辦理手續。
4. 此表格內的任何申請只有在本公司批准和記錄後才生效，您的申請亦必須符合所有適用法例及法規和當時由我們絕對酌情決定及不時規定的其他行政規則。本公司保留要求提供其他資料及文件以批准此表格的申請。
5. 此表格適用於信託持有的保單中信託設立人 / 財產授予人 / 信託受益人 / 執行人 / 保護人及其他實益擁有人的聯絡資料和 / 或個人信息需要更新時，並必須同時提供「信託核實表」及「補充陳述書 – 適用於法人」(如適用)作爲申請材料。
6. 身故賠償支付選項、保單繼承選項及精神上無行為能力保障的申請不適用於信託持有的保單。
7. 如需協助，歡迎聯絡您的持牌保險中介人，或聯絡我們的客戶體驗大使。我們非常樂意為您服務。
   - (香港)客戶服務熱線：(852) 3169 5500
   - (內地)客戶服務熱線：95500
   - 電郵：wecare@cpiclife.com.hk

1. Please ✓ the appropriate box(es) and complete in BLOCK LETTERS.
2. The signature(s) of the Policy Owner / Insured / Assignee / Irrevocable Beneficiary (if applicable) must be consistent with the record in China Pacific Life Insurance (H.K.) Company Limited (hereafter called "CPIC Life (HK)" or "the Company"), and any changes or amendments in this form must be endorsed in full signature. Please do not sign on blank or incomplete form.
3. This form must be received by the Company within 30 days from the date of its signing.
4. Any request made under this form will be effective only if it is approved and recorded by the Company. Your request is also subject to all applicable laws, regulations, and other prevailing administrative rules as determined by us at our absolute discretion from time to time. The Company reserves the right to request additional information and documents for approval for the request(s) made on this form.
5. This form is applicable to update contact information and / or personal particulars for Settlor / Trust Beneficiary(ies) / Enforcer / Protector and other Beneficial Owners, if the Policy is held under a trust, and must provide Verification of the Trust and Supplementary Information Form – Applicable to Entity (if applicable) as application documents.
6. Death Benefit Settlement Option, Policy Succession Option and Mental Incapacity Benefit are not applicable for insurance policies held under trust arrangement.
7. For any assistance, please feel free to contact your Licensed Insurance Intermediary or our Customer Experience Ambassador. We are always delighted to serve you.
   - Hong Kong Customer Service Hotline：(852) 3169 5500
   - Mainland Service Hotline：95500
   - Email：wecare@cpiclife.com.hk

第一部份　更改聯絡資料　Section I　Change of Contact Information

注意事項
1. 如提供的地址或聯絡電話號碼的國家 / 區域與您的保單記錄不同或居留司法管轄區有轉變時，請同時遞交「稅務居民身份自我證明表格」。
2. 恕不接受郵政信箱作為住宅地址或永久地址。
3. 在有需要的情況下，本公司保留權利索取額外地址證明以作核實。

Notes
1. If the country / region of address or contact phone no. is different from that in the policy record or your jurisdiction of residence has been changed, please also submit "Self-Certification Form for Tax Residency".
2. Post Office Box is not accepted as Residential Address or Permanent address.
3. We reserve the right to request for additional proof of the address for verification when necessary.

❑ **1. 更改地址 Change of Address**

❑ 更改同時應用於本人現時的所有保單 The change(s) will be applied to all my existing policy(ies)

❑ 通訊地址 Correspondence Address	❑ 同時更改為住宅地址 Also change as residential address ❑ 同時更改為永久地址 Also change as permanent address _____ _____ ❑ 香港 Hong Kong ❑ 其他城市 Other City: _____ 國家 Country: _____
❑ 住宅地址 Residential Address	_____ _____ ❑ 香港 Hong Kong ❑ 其他城市 Other City: _____ 國家 Country: _____
❑ 永久地址 Permanent Address	_____ _____ ❑ 香港 Hong Kong ❑ 其他城市 Other City: _____ 國家 Country: _____

❑ **2. 更改聯絡電話號碼 Change of Contact Phone No.**

聯絡電話號碼 Contact Phone No.	國家 / 區域名稱 Country / Region name	國家 / 區域編碼 Country / Region code	地區編碼（如適用）及電話號碼 Area code (if applicable) & Phone No.
❑ 手提 Mobile			
❑ 住宅 Residence			
❑ 公司 Office			

❑ **3. 更改電郵 Change of Email**

電郵 Email	

第二部份　更改個人資料
Section II　Change of Personal Particulars

注意事項
1. 請只填寫需要更改的資料項目。
2. 請遞交有關證明文件如身份證明文件及 / 或改名契（如有，適用於更改姓名）之核實副本，非香港永久居民須同時提交國籍證明。
3. 若此更新後，您是(i)美國公民或(ii)美國稅務居民，必須遞交"Request for Taxpayer Identification Number and Certification" (「W-9 表格」)或"Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)" (「W-8 BEN 表格」)。
4. 如更新出生地（城市 / 國家）、公司註冊地區 / 國家所屬司法管轄區並非香港或居留司法管轄區有轉變時，必須遞交「稅務居民身份自我證明表格」。

Notes
1. Please only complete the item required to be changed.
2. Please provide the certified true copy of relevant supporting documents, e.g. Identity Document and/or Deed Poll (if any, applicable to Change of Name). For non-Hong Kong permanent citizens, nationality proof is required.
3. If you are a (i)U.S. citizen or (ii)U.S. tax resident after update, you must provide "Request for Taxpayer Identification Number and Certification" ("Form W-9") or "Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)" ("Form W-8 BEN").
4. If your updated Place of Birth (City / Country) or Region / Country of Incorporation is not Hong Kong or your jurisdiction of residence is changed, "Self-Certification Form for Tax Residency" must be provided.

	❑ 更改保單持有人之個人資料 Change of Policy Owner's Personal Particulars		❑ 更改受保人之個人資料（如非保單持有人） Change of Insured's Personal Particulars (if the Insured is different from the Policy Owner)	
英文姓名 (以身份證明文件為準) Name in English (As shown on Identity Document)	姓氏 Surname		姓氏 Surname	
	名字 Given Names		名字 Given Names	
中文姓名 (以身份證明文件為準) Name in Chinese (As shown on Identity Document)	姓氏 Surname		姓氏 Surname	
	名字 Given Names		名字 Given Names	

出生日期 Date of Birth	日 DD / 月 MM / 年 YYYY		日 DD / 月 MM / 年 YYYY	
出生地（城市 / 國家） Place of Birth (City / Country)				
	❑ 更改保單持有人之個人資料 Change of Policy Owner's Personal Particulars		❑ 更改受保人之個人資料 （如非保單持有人） Change of Insured's Personal Particulars (if the Insured is different from the Policy Owner)	
身份證明文件類型和號碼 Type and no. of the Identity Document	證件類型 ID Type	❑ 身份證 ID card ❑ 護照 Passport ❑ 其他(請註明)Others (Please specify)	證件類型 ID Type	❑ 身份證 ID card ❑ 護照 Passport ❑ 其他(請註明)Others (Please specify)
	證件號碼 ID No.		證件號碼 ID No.	
國籍 Nationality				
簽署式樣 Signature Specimen	新簽署式樣 Specimen of new signature		新簽署式樣（如受保人並非保單持有人及 18 歲或以上） Specimen of new signature (if the Insured is different from the Policy Owner & aged 18 or above)	
居留司法管轄區 Jurisdiction of Residence	請填妥及遞交「稅務居民身份自我證明表格」。 Please complete and submit the "Self-Certification Form for Tax Residency".			
其他（請註明） Others (Please Specify)				

第三部份　更改受益人　Section III　Change of Beneficiary

注意事項
1. 下列保單受益人之提名取代一切以往的受益人、後備受益人(如有)及其各自的受益人選項(如有)。
2. 如無特別指明，身故賠償將會平均分配給各受益人。
3. 當下列保單受益人之新增或更改獲批准，您已揀選的保單繼承選項 / 身故賠償支付選項（如有）將會被撤銷。
4. 若保單持有人指定以下人士為不可撤換受益人，請註明並一併遞交其身份證明文件之核實副本，18歲或以上之不可撤換受益人需要在身份證明文件之核實副本上簽署以作日後核對之用。
   請注意：當保單持有人申請轉換保單權益、抵押轉讓、更改受益人、提取任何保單價值、部份退保或退保，必須獲得不可撤換受益人簽署同意。
5. 若您的保險計劃可(1)就每位受益人指定後備受益人(如適用); (2)就每位受益人及後備受益人(如適用)選擇其各自不同的保單繼承選項 / 身故賠償支付選項，請填寫「更改受益人及受益人選項申請表」。 請聯絡您的持牌保險中介人或聯絡我們的客戶體驗大使協助您提交相關申請。
6. 指定或更改保單受益人需由本公司批核，若保單為 / 將爲信託持有，如果新保單受益人與保單持有人 / 準持有人不一致，此類申請可能不會獲得批准。

Notes
1. The following designation of Beneficiary(ies) of the Policy supersedes all prior Beneficiaries, Contingent Beneficiary(ies) (if any) and their respective Beneficiary Option(s) (if any).
2. Death Benefit will be shared equally among the beneficiaries unless otherwise stated.
3. Your selected Policy Succession Option / Death Benefit Settlement Option (if any) will be revoked when the following designation or change of Beneficiary is approved by us.
4. Please specify and submit this form along with the certified true copy of the identity documents of the respective Beneficiary if the Policy Owner appoints the following person(s) as Irrevocable Beneficiary. Any Irrevocable Beneficiary aged 18 or above is required to sign on the certified true copy of the identity documents as a specimen for future verification.
   Please note: When the Policy Owner applies for change of policy ownership, collateral assignment, change of beneficiary, withdrawal of any policy value, partial surrender or surrender of the policy, consent from the Irrevocable Beneficiary by signing the application must be provided.
5. If your insurance plan allows (1) the designation of Contingent Beneficiaries (if applicable) for each Beneficiary or (2) the selection of different Policy Succession Option / Death Benefit Settlement Option for each Beneficiary and Contingent Beneficiary (if applicable), please complete the "Request for Change of Beneficiary and Beneficiary Option" form. Please contact your Licensed Insurance Intermediary or our Customer Experience Ambassador to assist you in submitting the request.
6. Request for designation / change of Policy Beneficiary is subject to the approval of China Pacific Life Insurance (H.K.) Company Limited. If the Policy is or will be held under a trust, such request may or may not be approved if the proposed policy beneficiary is different from the Policy Owner / Proposed Policy Owner.

受益人姓名 (英文/中文) Name of Beneficiary (English / Chinese)	證件類型 ID Type	身份證 / 護照號碼 ID card / Passport No.	性別 Sex	出生日期 (日 / 月 / 年) Date of Birth (DD/MM/YY)	與受保人關係 (如非直系親屬，請註明原因) Relationship to Insured (Please provide a reason for non-direct family member)	分配 (整數百分比) Share (%) (Integer only)
					以上受益人分配總和必須為 Total sum of the above Beneficiary(ies) must be 100%	

* 受益人若為信託公司，請提供公司註冊文件類別及號碼。
If the proposed beneficiary is an entity (e.g. trustee company), please provide the type of Company Registration Document and No..
\# 受益人若為信託公司，請填入關係為“信託”。
If the proposed beneficiary is a trustee company, please enter relationship as “Trust”.

第四部份　更改身故賠償支付選項 (只適用於指定保險計劃)
Section IV　Change of Death Benefit Settlement Option (Only applicable to the specified insurance plans)

❑ 一筆過選項 (100%以整筆形式支付)　Lump Sum Option (100% lump sum payment)

❑ 分期選項 Installment Option

❑ 每年分期支付（最少為 5 年，最多為 20 年）:
Annual Installment Payment (min. 5 years and max. 20 years): _____ 年 Years

❑ 以整筆形式支付身故賠償金額的百份比（需為整數）:
Percentage of Death Benefit paid in Lump sum (must be integer): _____%;
餘額每年分期支付（最少為 5 年，最多為 20 年）:
Remaining balance paid by annual installment (min. 5 years and max. 20 years): _____ 年 Years

注意事項

1. 更改身故賠償支付選項，必須由保單持有人在受保人生存期間提交申請。
2. 身故賠償支付選項並不適用於已轉讓抵押的保單或已選擇保單繼承選項的保單。
3. 以上所選擇的身故賠償支付選項將適用於所有受益人。
   若您的保險計劃可(1)就每位受益人指定後備受益人(如適用); (2)就每位受益人及後備受益人(如適用)選擇其各自不同的保單繼承選項 / 身故賠償支付選項，請填寫「更改受益人及受益人選項申請表」。請聯絡您的持牌保險中介人或聯絡我們的客戶體驗大使協助您提交相關申請。
4. 您所選擇的身故賠償支付選項將會在某些情況下自動撤銷，例如更改保單持有人、保單抵押轉讓、更改受益人或申請保單繼承選項。詳情請參閱相關保單條款。
5. 身故賠償支付選項只適用於指定保險計劃。揀選或行使分期選項須符合指定條件，詳情請參閱相關保單條款。

Notes

1. To change Death Benefit Settlement Option, the request shall be submitted to us during the lifetime of the Insured.
2. Death Benefit Settlement Option is not available for Policy which is assigned as collateral security or if Policy Succession Option is selected.
3. The above selected Death Benefit Settlement Option will apply to all beneficiaries.
   If your insurance plan allows (1) the designation of Contingent Beneficiaries (if applicable) for each Beneficiary or (2) the selection of different Death Benefit Settlement Option / Policy Succession Option for each Beneficiary and Contingent Beneficiary (if applicable), please complete the "Request for Change of Beneficiary and Beneficiary Option" form. Please contact your Licensed Insurance Intermediary or our Customer Experience Ambassador to assist you in submitting the request.
4. Your selected Death Benefit Settlement Option shall be automatically revoked under certain circumstances, such as change of Policy Owner, Collateral Assignment, change of Beneficiary or application for Policy Succession Option. For details, please refer to the relevant policy provisions.
5. Death Benefit Settlement Option is only applicable to the specified insurance plans. The selection of, or exercise of, the Installment Option is subject to the prescribed conditions. For details, please refer to the relevant provisions of the Policy.

第五部份　更改保單繼承選項 (只適用於指定保險計劃)
Section V　Change of Policy Succession Option (Only applicable to the specified insurance plans)

❑ 保單繼承選項 Policy Succession Option　　❑ 取消保單繼承選項 Cancellation of Policy Succession Option

注意事項

1. 更改保單繼承選項，必須由保單持有人在受保人生存期間提交申請。
2. 申請保單繼承選項並不適用於已轉讓抵押的保單。
3. 若申請保單繼承選項並獲批准時，所有已選擇的身故賠償分期選項將會被撤銷。
4. 您所選擇的保單繼承選項將會在某些情況下自動撤銷，例如更改保單持有人、保單抵押轉讓或更改受益人。詳情請參閱相關保單條款。
5. 在指定情況下 (如保單有 1 位以上的指定受益人、受益人並非自然人、受益人比受保人年長或超過 65 歲等) ，我們將無法接受您的保單繼承選項申請。
   若您的保險計劃可(1)就每位受益人指定後備受益人(如適用); (2)就每位受益人及後備受益人(如適用)選擇其各自不同的保單繼承選項 / 身故賠償支付選項，請填寫「更改受益人及受益人選項申請表」。請聯絡您的持牌保險中介人或聯絡我們的客戶體驗大使協助您提交相關申請。
6. 保單繼承選項只適用於指定保險計劃。揀選或行使保單繼承選項須符合指定條件，詳情請參閱相關保單條款。

Notes

1. To change Policy Succession Option, the request shall be submitted to us while the Insured is alive.
2. Policy Succession Option is not available for Policy which is assigned as collateral security.
3. The selected Death Benefit Settlement Option (Installment Option) will be revoked when Policy Succession Option is applied and approved.
4. Your selected Policy Succession Option shall be automatically revoked under certain circumstances, such as change of Policy Owner, Collateral Assignment, or change of Beneficiary. For details, please refer to the relevant policy provisions.
5. Under the specified circumstances (e.g. more than one designated beneficiary, beneficiary is not a natural individual, the beneficiary is older than the life insured or exceeds 65 years old, etc.), we will not be able to accept your request for Policy Succession Option.
   If your insurance plan allows (1) the designation of Contingent Beneficiaries (if applicable) for each Beneficiary or (2) the selection of different Policy Succession Option / Death Benefit Settlement Option for each Beneficiary and Contingent Beneficiary (if applicable), please complete the "Request for Change of Beneficiary and Beneficiary Option" form. Please contact your Licensed Insurance Intermediary or our Customer Experience Ambassador to assist you in submitting the request.
6. Policy Succession Option is only applicable to the specified insurance plans. The selection of, or exercise of, the Policy Succession Option is subject to the prescribed conditions. For details, please refer to the relevant provisions of the Policy.

第六部份 Section VI 精神上無行為能力保障領取人資料（「領取人」）(只適用於指定保險計劃) Information of the recipient of the Mental Incapacity Benefit ("The Recipient") (Only applicable to the specified insurance plans)

注意事項

1. 只適用於「世代悅享儲蓄壽險計劃 2」。
2. 領取人之提名並不適用於已轉讓抵押的保單。
3. 當您被診斷為精神上無行為能力人士時，以下指定領取人可獲得您指定之百分比的退保價值。如指定的領取百份比為100%，保單將會在我們支付此保障後終止。詳情請參閱相關保單條款。
4. 您必須同時是保單的受保人。
5. 領取人的已屆年齡必須是18歲或以上。
6. 領取人必須是您的配偶、父母、子女或其他我們同意的人士。
7. 已指定的領取人將會在某些情況下自動撤銷，例如更改 / 刪除領取人、更改保單持有人、更改受保人及申請保單抵押轉讓等。詳情請參閱相關保單條款。

Notes

1. Only applicable to Everlasting Joy Savings Insurance Plan 2.
2. The designation of the Recipient is not available for Policy which is assigned as collateral security.
3. When you are diagnosed as a Mentally Incapacitated Person, the following designated Recipient may receive the percentage of Surrender Value designated by you. If the specified percentage is 100%, the Policy shall be terminated after we pay this benefit. Please refer to the relevant policy provisions for details.
4. You must also be the Insured of the Policy.
5. The Attained Age of the Recipient must be 18 or above.
6. The Recipient must be your spouse, parent, child or any other person agreed by us.
7. Your designated Recipient will be automatically revoked under certain circumstances, such as change or removal of the Recipient, change of Policy Owner, change of Insured and Collateral Assignment, etc. For details, please refer to the relevant policy provisions.

英文/中文姓名 English / Chinese Name	證件類型 ID Type	身份證 / 護照號碼 ID card / Passport No.	性別 Sex	出生日期 (日/月/年) Date of Birth (DD/MM/YY)	與受保人關係 Relationship to Insured	退保價值百份比 (整數) % of Surrender Value (Integer)

如以上領取人並非您的配偶、父母或子女，請提供原因 (註:本公司保留權利索取領取人和您的關係證明):
If the above Recipient is not your spouse, parent or child, please provide reason (Note: The Company reserves the right to request proof of relationship between the Recipient and you):

_____

第七部份 Section VII 授權 - 個人資料用作直接推廣 Authorization - use or provide your personal data for any direct marketing purposes

請在適當方格內加上 ✓ 號以表示您希望更改附件「個人資料收集聲明」第6段中列出的關於使用或提供您的個人資料用於直接推廣目的的現有選項。
Please ✓ the appropriate box to indicate your wish to change your existing option regarding the use or provision of your personal data for the direct marketing purposes which are listed out in paragraph 6 of the attached "Personal Information Collection Statement".

❑ 本人 / 我們同意將本人 / 我們的個人資料用於直接推廣。
I / we consent the use and provision of personal data for direct marketing purposes.

❑ 本人 / 我們表示不同意將本人 / 我們的個人資料用於直接推廣。
I / we do not consent the use and provision of personal data for direct marketing purposes.

第八部份　聲明及授權書
Section VIII　Declaration and Authorization

1. 本人 / 我們謹此要求本人之保單依照本申請書之選擇作出更改，並明白及同意此申請將不會生效直至(1)所有有關文件、資料及款項（如適用）收妥及(2)此項申請是經太保壽險香港批核後方可作實。
2. 本人 / 我們聲明及同意上述一切資料，不論是否本人 / 我們親手所寫，就本人 / 我們所知所信，均為事實之全部並確實無訛。
3. 如本人 / 我們不能提供任何此申請所須的資料或未能符合太保壽險香港的有關規定，本人 / 我們明白太保壽險香港可能因此不能接受此保單更改申請。
4. 本人 / 我們謹此確認已閱讀及明白以上申請的所有條款及條件及所有注意事項，並同意受該等條款及條件約束。本人 / 我們謹此同意作出以上指示及聲明。
5. 本人 / 我們確認本人 / 我們已閱讀並明白本表格附件之「個人資料收集聲明」及「中國內地私隱附錄(適用位於中國內地的客戶) 」(下稱「私隱附錄」)。本人 / 我們特此確認並同意太保壽險香港根據「個人資料收集聲明」使用和移轉本人 / 我們的個人資料及按照「私隱附錄」所述方式處理、使用和傳輸本人的個人信息以及敏感個人信息。本人 / 我們已取得在此申請提供第三方資料（如有）所需的同意。本人 / 我們確認並同意為「個人資料收集聲明」中所述之目的將本人 / 我們的個人資料移轉至香港境外給「個人資料收集聲明」所述的承轉人的類別。

1. I / We hereby request that my Policy be changed in accordance with the particulars set out in this application and I / we understand and agree that the request for change(s) shall not take effect until (1) any required documents, information and payments (if applicable) are submitted in full and (2) the application is duly approved by CPIC Life (HK).
2. I / We hereby declare and agree that all information in this application whether or not written by my / our own hand are to the best of my knowledge and belief complete and true.
3. If I /we fail to provide any information requested in this application or fulfill CPIC Life (HK)'s requirement(s), I / we understand that it may result in CPIC Life (HK)'s inability to accept this application.
4. I / We hereby confirm that I / we have read and understand all the notes, terms and conditions of the above request, and agree to be bound by them. I / We hereby agree to make the above instructions and declarations.
5. I / We acknowledge and confirm that I / we have read and understand the Personal Information Collection Statement and Privacy Addendum for Mainland China (applicable to customers located in Mainland China) (Privacy Addendum) attached to this form. I / We hereby give my / our acknowledgement and agree to the use and transfer of my / our personal data by the Company in accordance with the Personal Information Collection Statement and CPIC Life (HK) can process, use and transfer my personal data and Sensitive Personal Data as set out in the Privacy Addendum. I / We have obtained the consent to provide the third party information (if any) in this application. I / We acknowledge and consent to the transfer of my / our personal data outside of Hong Kong for the purposes and to the types of transferee as set out in the Personal Information Collection Statement.

保單持有人簽署 Signature of Policy Owner	簽署日期（日 / 月 / 年） Sign on (DD/MM/YYYY)
受保人簽署（如受保人並非保單持有人及18歲或以上） Signature of Insured (If the Insured is different from the Policy Owner & aged 18 or above)	簽署日期（日 / 月 / 年） Sign on (DD/MM/YYYY)
承讓人簽署（如適用） Signature of Assignee (if applicable)	簽署日期（日 / 月 / 年） Sign on (DD/MM/YYYY)
不可撤換受益人簽署（如適用） Signature of Irrevocable Beneficiary (if applicable)	簽署日期（日 / 月 / 年） Sign on (DD/MM/YYYY)

請參閱下頁的「個人資料收集聲明」及「私隱附錄」。
Please read the Personal Information Collection Statement and Privacy Addendum on next page.

個人資料收集聲明
Personal Information Collection Statement

太保壽險香港尊重和保障您的私隱及承諾遵守〔個人資料（私隱）條例〕(香港特別行政區（「香港」）法例第 486 章)(「私隱條例」)的要求。本聲明適用於太保壽險香港所提供的所有產品和服務，並闡述本公司收集客戶個人資料的原因、資料的擬定用途，可能獲提供個人資料的人士，以及有關查閱、檢視及修改個人資料的方法。本聲明中的「客戶」是指資料當事人（定義見私隱條例），包括現有和未來的保單持有人、受保人、受益人、以及根據保單指定或有權收取款項和 / 或其他利益的其他人。

1. 太保壽險香港所收集及 / 或持有的個人資料

於本聲明內，「個人資料」 的含義與私隱條例中的定義相同，其意包括(a)直接或間接與一名在世的個人有關的；(b) 從該資料直接或間接地確定有關的個人的身分是切實可行的；及(c)該資料的存在形式令予以查閱及處理均是切實可行的數據。本公司所收集及 / 或持有的個人資料包括但不限於您的姓名、身份證號碼、聯絡資料、家族歷史、保單資料、學歷、就業資料、財務資料、健康和醫療資料。

太保壽險香港將保留您的個人資料直至達到收集個人資料的目的及符合法例要求。如果太保壽險香港不再需要您的個人資料以作任何用途，本公司將會採取合理的步驟，安全地刪除或銷毀您的個人資料。

2. 未能提供個人資料的影響

提供您的個人資料純屬自願。如果您不向我們提供所需的個人資料，我們可能無法向您提供所需的產品及服務。

3. 太保壽險香港收集個人資料的目的

太保壽險香港所持有您的個人資料可能會用於以下目的：

a) 處理保險產品或服務的申請及核實相關的資格；
b) 設計全新或加強現時太保壽險香港所提供的保險產品、服務及相關產品；
c) 管理已簽發的保單；
d) 處理付款指示；
e) 處理任何保險索償；
f) 進行統計及精算研究；
g) 資料核對，或開展核對程序（定義見私隱條例，但廣泛而言包括對資料當事人兩套或更多套的資料進行比對，以採取不利於資料當事人的行動，例如拒絕申請）；內部業務及行政之用；
h) 釐定本公司欠付您或您拖欠本公司的任何款項的金額，及執行您之責任，包括向您或任何已為您的債務向本公司提供任何擔保或承諾的人士追收尚欠金額(如有)；
i) 就您在本公司持有的任何帳戶或本聲明未來的變更發出行政性通訊；
j) 直接推廣；
k) 進行保單檢閱及需要分析；
l) 滿足任何適用法律、規則、實務守則或指引規定的要求，或協助在香港或香港以外的監管機構執法及進行調查；
m) 在收集時列明的其他用途；
n) 與上述任何一項直接有關的其他用途。

4. 轉交

太保壽險香港收集的個人資料將保密處理，但可能會轉交給及向以下不論是位於香港境內或境外的任何一方披露，以作上述第 a) 至 n) 項之用途。

i. 中國太平洋保險（集團）股份有限公司（「太保集團」）及集團內的其他公司；
ii. 任何進行保險及 / 或再保險有關業務的公司；
iii. 任何與太保壽險香港有合約的持牌保險中介人；
iv. 任何保險索償調查人員；
v. 任何夥伴金融機構；
vi. 就業務經營關係向太保壽險香港提供行政、技術、數據處理、電訊、電腦、支付、債務追收、電話中心服務、直接推廣服務或其他服務的任何代理、承包商或第三方管理人員；
vii. 任何不時存在的保險業協會及聯會；
viii. 任何提供保險及 / 或再保險相關業務的其他服務供應商；
ix. 任何政府部門及司法機構或監管機構；
x. 在收集個人資料時已通知您的任何其他團體。

5. 查閱及修改

根據私隱條例，您有權要求查閱及 / 或修改由本公司持有的您的個人資料。如果您想要查閱及 / 或修改由本公司持有您的個人資料，請向本公司的資料保護主任作出書面要求，地址是香港尖沙咀廣東道 25 號港威大廈 2 座 22 樓 2208 室。

6. 直接推廣

太保壽險香港希望就產品優惠及宣傳資料與您保持聯繫，未經您的同意，太保壽險香港不會使用或向其它機構提供閣下之個人資料作直接推廣用途。

太保壽險香港會不時使用和 / 或提供給 (i)太保集團； (ii) 太保集團的成員公司；和 / 或 (iii) 第三方服務提供商（無論是否以獲取利益為目的）您的姓名、住址、聯絡地址、電郵及電話號碼（「該資料」）作直接推廣以下之產品和服務：

- 保險、年金、財富管理、基金投資服務、退休計劃和其他金融相關的產品和服務；
- 與健康、保健和醫療、退休養老、體育活動和會員資格、健身或類似休閒活動、旅行和交通、社交網絡、媒體和醫療保健服務相關的產品和服務；和
- 獎勵、增加現有客戶忠誠度推廣或特權計劃的相關產品和服務。

請您向太保壽險香港的資料保護主任作出書面要求，查閱或取消使用及提供該資料作直接推廣用途，地址是香港尖沙咀廣東道 25 號港威大廈 2 座 22 樓 2208 室。

CPIC Life (HK) respects and protects your privacy and pledges to comply with the requirements of the Personal Data (Privacy) Ordinance (Cap. 486 of the laws of Hong Kong Special Administrative Region ("Hong Kong")) (the "Ordinance"). This statement applies to all products and services provided by CPIC Life (HK) and sets out why the Company collects the personal data about the customer(s), how it is intended to be used, to whom it may be provided to and how to access, review and correct the personal data. "Customer(s)" in this statement means data subjects (as defined under the Ordinance) and includes existing and prospective insurance policy owners, insureds, beneficiaries and other persons designated or entitled to receive moneys and/or other benefits under an insurance policy.

1. Personal data collected and / or held by CPIC Life (HK)

In this statement, "personal data" bears the same meaning as defined under the Ordinance. It includes any data (a) relating directly or indirectly to a living individual; (b) from which it is practicable for the identity of the individual to be directly or indirectly ascertained; and (c) in a form in which access to or processing of the data is practicable. The personal data that the Company collects and/or holds includes but is not limited to name, identity card number, contact information, family history, policy details, education details, employment details, financial details, health and medical information.

CPIC Life (HK) will keep the personal data for as long as necessary to achieve the purpose for which it was collected and to comply with prevailing legal requirements. If CPIC Life (HK) no longer needs the personal data for any purposes, the Company will take reasonable steps to securely delete or destroy personal data.

2. Consequence of failing to provide personal data

The provision of the personal data is voluntary. If you do not provide us with the requested personal data, it may inhibit our ability to provide or continue to provide your requested products and service.

3. Purposes of personal data collected by CPIC Life (HK)

Personal data held by CPIC Life (HK) may be used for the following purposes:

a) processing applications and verifying the eligibility for insurance products or services;
b) designing new or enhancing existing insurance products, services and related products provided by CPIC Life (HK);
c) administering the policies issued;
d) processing payment instructions;
e) processing any insurance claims;
f) conducting statistical and actuarial research;
g) data matching or conducting matching procedure (as defined in the Ordinance, but broadly includes comparison of two or more sets of the data subject's data, for purposes of taking actions adverse to the interests of the data subject, such as declining an application), internal business and administrative purposes;
h) determining amount of indebtedness owed to or by you, and performing your obligations including the collection of amounts outstanding from you or any person who has provided any security or undertaking for your liabilities owing to the Company (if any);
i) sending out administrative communications about any accounts you may have with the company or about future changes to this statement;
j) direct marketing;
k) performing policy review and needs analysis;
l) meeting obligations and requirements imposed by any applicable laws, regulations, codes of practice or guidelines or assisting with law enforcement purposes, investigations by regulatory authorities in Hong Kong or elsewhere;
m) other purposes as notified at the time of collection;
n) other purposes directly relating to any of the above.

4. Transfer

The personal data collected by CPIC Life (HK) will be kept confidential but may be transferred and disclosed to any of the following parties, whether within or outside Hong Kong, for the purposes as specified in a) to n) above:

i. China Pacific Insurance (Group) Co., Ltd ("CPIC Group") and any other companies within the Group;
ii. any companies carrying on insurance and / or reinsurance related business;
iii. any licensed insurance intermediaries who have an agreement with CPIC Life (HK);
iv. any insurance claim investigators;
v. any partnering financial institutions;
vi. any agents, contractors or third parties administrators who provide administration, technology, data processing, telecommunications, computers, payment, debt collection, call centre services, direct marketing services, or other services to CPIC Life (HK) in connection with the operation of its business;
vii. any applicable and relevant associations and federations of the insurance industry that exist from time to time;
viii. any other service providers providing insurance and / or reinsurance related business;
ix. any governmental and judicial bodies or regulators;
x. any other parties as notified to you at the time of collection.

5. Access and Correction

In accordance with the provision of the Ordinance, you have the right to request access to and / or correction of your personal data held by CPIC Life (HK). If you want to access and / or correct your personal data held by CPIC Life (HK), please make such a request by writing to our Data Protection Officer at Suite 2208, 22/F, Tower 2, The Gateway, 25 Canton Road, Tsim Sha Tsui, Hong Kong.

6. Direct Marketing

CPIC Life (HK) would like to keep in touch with you regarding product offers and promotional materials. Without your consent, CPIC Life (HK) will not use or provide your personal data to any external parties for any direct marketing purposes.

CPIC Life (HK) will use your name, residential address, contact address, email and phone number ("Information") from time to time and/or provide the Information to (i) CPIC Group; (ii) CPIC Group member companies; and/or (iii) third-party service providers (whether or not in return for gain) for direct marketing of the following:

- insurances, annuities, wealth management, fund investment services, retirement schemes and other financial related products and services;
- products and services in relation to health, wellness and medical, healthy ageing and retirement, sporting activities and membership, fitness or similar leisure activities, travel and transportation, social networking, media, medical care services; and
- reward, customer loyalty or privilege programme and related products and services.

Please notify the Data Protection Officer of CPIC Life (HK) in writing to Suite 2208, 22/F, Tower 2, The Gateway, 25 Canton Road, Tsim Sha Tsui, Hong Kong if you wish to access or withdraw your consent to the use and provision of Information for direct marketing purposes.

中國內地私隱附錄
Privacy Addendum for Mainland China

本附錄僅適用於位於中國內地的客戶。本私隱附錄構成太保壽險(香港)的《個人資料收集聲明》的組成部分，僅適用於位於中國內地並從香港接收我們產品及/或產品相關服務的個人客戶。如本附錄與本公司的《個人資料收集聲明》中的條款存有任何衝突或不一致，應以本附錄之條款爲準。

作爲您的保單繕發機構，太保壽險(香港)是您個人信息的處理者。根據中國內地有關信息保護的法律，您可以通過 wecare@cpiclife.com.hk 與我們取得聯繫。根據中國內地法律的要求，當我們向您提供產品及與服務時，我們可能需要就如何使用您的個人信息征得您的同意。對於某些基於中國內地法律被視爲敏感的個人信息，我們可能需要征得您的單獨同意。您的個人信息將被收集、訪問、處理、使用、存儲和/或傳輸至中國內地以外的地區，其類型、目的、方法、權利行使方式和聯繫信息詳見我們的《個人資料收集聲明》。如果您不同意本私隱附錄，我們可能無法向您提供您購買的產品， 並且無法向您提供相關的服務。

根據中國內地有關數據保護的法律，我們將基於您的同意處理您的個人信息，除非您的個人信息屬於以下情況：

- 爲訂立或履行您作爲一方當事人的合同所必需的；
- 爲履行法定義務所必需的；
- 爲應對突發公共衛生事件所必需的；
- 爲保護自然人的生命健康和財產安全所必需的；
- 爲公共利益實施新聞報道、輿論監督行爲在合理範圍內處理的個人信息；或
- 個人自行公開或者已經合法公開的個人信息。

部分我們收集的您的特定個人信息屬中國內地現行數據保護相關法律法規所定義的敏感個人信息，即如果被泄露或被非法使用，可能對您的權益、人身或財產安全產生重大影響的個人信息，包括但不限於金融賬戶、身份證件號碼、醫療健康信息、生物特徵識別、宗教信仰、特定身份、個人行踪軌迹有關的資料或未滿 14 周歲未成年人的個人信息。我們收集敏感個人信息僅用於特定目的，例如簽發您的保單，處理您提出的更改個人信息的要求，以及調查您向我們提交的所有索賠申請。如我們未能處理閣下的敏感個人信息，將無法爲閣下提供相關的產品及／或服務。我們一般不會直接收集未滿 14 周歲兒童的個人信息，但在提供相關服務所需的情況下，我們可能會向兒童的父母或法定監護人收集此類個人信息，而父母或法定監護人可行使未成年人的權利並同意我們使用其個人信息。我們採用和實施嚴格的保安政策，以保護閣下敏感個人信息的機密性和隱私性。

我們將在必要期限內保留您的個人信息，以實現我們的《個人資料收集聲明》和本私隱附錄所述處理您的個人信息的必要目的。我們將通過以下一項或多項的因素來確定您個人信息的保存期限：我們是否與您仍然維持著法律關係；我們必須遵守的法律義務所要求的；以及是否涉及我們的法律地位（如適用的訴訟時效、訴訟、審計或監管調查）。閣下的個人信息此後將被安全刪除或處置。除非由於法定原因我們不得不保留某些信息，否則我們將僅在法律法規要求的限度內處理該等信息且不會將其用於我們的日常業務活動。

爲了管理您的保單以及向您提供產品和服務，我們可能將您的個人信息提供給我們的《個人資料收集聲明》中的持牌保險中介人、承保人、第三方服務提供商、醫療機構例如醫院、 醫療診所以及實驗室測試設施、中國太平洋保險（集團）股份有限公司（「太保集團」）及集團內的其他公司、審計師、法律顧問、財務顧問、再保險人、政府部門及司法機構、監管機構、保險業協會及聯會、銀行、支付結算代理人、第三方支付服務提供商和索賠調查機構。目前，我們將您的個人信息提供給位於中國內地的中國太平洋人壽保險股份有限公司 (life.cpic.com.cn/xrsbx/) 處理，以便向您提供產品和服務，其類型、目的和方法詳見我們的《個人資料收集聲明》。

個人信息的接收方可以收集和處理您的個人信息，並將其返還給我們，以便我們管理您的保單。我們向接收方提供的個人信息類型包括但不限於：您的個人身份信息、醫療信息、過去的健康記錄/信息和財務信息。我們會通過電子或其他方式向接收方提供您的個人信息，並按照我們的指示、私隱政策以及任何其他適當的保密和安全措施，爲我們處理此類信息。根據中國內地適用的法律法規，我們在控制、處理和傳輸您的個人信息和敏感的個人信息時，將採取最高的安全措施。我們還制定了自己的安全政策以保護您的個人信息和敏感個人信息。

除我們的《個人資料收集聲明》中規定的訪問權外，您還有權獲得我們持有的您個人信息的副本、撤回對我們使用閣下個人信息的同意、有權限制或反對他人處理閣下的個人信息並有權在下列任何情形發生時要求刪除您的個人信息：

- 處理您的個人信息的目的已經達到或未能達到，或該個人信息對於達到該目的已無必要；
- 我們已停止提供產品或服務，或保留期限已屆滿；
- 您撤回同意；
- 我們違反了現行數據保護相關的法律法規。

您可以通過本私隱附錄中列出的聯繫方式與我們聯繫，以撤回對我們處理您個人信息的同意。如果您撤回對我們處理您的個人信息的同意，我們可能無法向您提供相關產品和/或服務。如閣下有意根據中國個人信息保護法行使閣下的任何權利，可以向本公司的資料保護主任作出書面要求，地址是香港尖沙咀廣東道 25 號港威大厦 2 座 22 樓 2208 室。

如果與本私隱附錄的規定不一致時，包括但不限於定義（例如敏感個人信息），則以中國《網絡安全法》、《個人信息保護法》、《數據安全法》其實施辦法和其他網絡安全和數據保護相關的中華人民共和國法律法規爲準。

我們有權不時更新本私隱附錄，並通過我們網站或應用平台（視具體情況而定）發布本私隱附錄的更新以向您通知相關內容。

This Addendum only applies to you if you are located in Mainland China. This Privacy Addendum forms part and parcel of CPIC Life (HK)'s Personal Information Collection Statement and specific to individual customers who are located in Mainland China and receiving our product(s) and/or service(s) associated with the product(s) from Hong Kong. If there is any conflict or inconsistency between the terms of this Addendum and any terms set forth in CPIC Life (HK)'s Personal Information Collection Statement, the terms of this Addendum shall prevail.

CPIC Life (HK) (hereinafter also referred to as "we", "us" or "our"), the issuer of your insurance policy, is the processor of your personal data and you may reach us via wecare@cpiclife.com.hk in accordance with the applicable data protection laws of Mainland China. As required by the laws of Mainland China, when we provide you with the product(s) and the service(s), we may need to seek your consent on how we use your personal data and, in relation to certain personal data which is considered sensitive based on the laws of Mainland China, we may need your separate consent. Your personal data will be collected, accessed, processed, used, stored, and/or transferred outside of Mainland China, with the types, purposes, methods, way of right exercise and contact information set out in our Personal Information Collection Statement. If you do not consent to this Privacy Addendum, we may not be able to provide you with the product(s) you are purchasing from us and offer you with the service(s).

Under the applicable data protection laws in Mainland China, we will process your personal data based on your consent, unless your personal data are:

- necessary to conclude or perform a contract in which you are a party;
- necessary for us to comply with legal obligations;
- necessary to respond to public health emergencies;
- necessary to protect individuals' life, health, and property safety;
- reasonably processed in news reporting and public opinion oversight for public interests; or
- publicly available, because of your voluntary disclosure or a legal requirement, and reasonably processed.

Certain personal data that we collect about you is sensitive personal data as defined in the applicable data protection laws in Mainland China ("Sensitive Personal Data"), which is personal data that may materially impact your rights and interests, cause harm to your dignity, personal or property safety, if leaked or unlawfully used, including but not limited to financial accounts, national identification number, medical or health-related information, biometric identification, religious belief, specific identity, individual location tracking or any personal data of minors under the age of fourteen. We collect the Sensitive Personal Data only for specific purposes, such as assessing your application for the issuance of an insurance policy to you, processing your request of changes in personal data and investigation on any claims applications submitted to us. We will not be able to provide you with the product(s) and/or service(s) if we fail to process your Sensitive Personal Data. We generally do not directly collect personal data from a child under the age of fourteen but may collect such personal data from the parent or legal guardian of the child where such processing necessary for providing relevant services while the parent or legal guardian may exercise the minor's rights and consent to us. We adopt and implement strict security policies to protect the confidentiality and privacy of your sensitive personal information. We adopt and implement strict security policies to protect the confidentiality and privacy of your sensitive personal information.

We will retain your personal data for the period necessary to fulfill the necessary purposes of processing your personal data as outlined in our Personal Information Collection Statement and this Privacy Addendum. The criteria used to determine our retention periods may include one or more of the following: as long as we have an ongoing relationship with you; as required by a legal obligation to which we are subject; and as advisable in light of our legal position (such as in regard of the applicable statute of limitation, litigation, audits or regulatory investigation). Your personal data will be securely deleted or disposed of thereafter. Unless we have to retain certain data due to legal reasons, we will only process such data to the extent required by laws and regulations and will not use it in our daily business activities.

We may also provide your personal data to other recipients, within or outside Mainland China as set out in our Personal Information Collection Statement including but not limited to any licensed insurance intermediaries, insurers, third party service providers, medical institutions such as hospitals, medical clinics and laboratory testing facilities, China Pacific Insurance (Group) Co., Ltd ("CPIC Group") and any other companies within the Group, auditors, legal advisors, financial advisors, reinsurers, governmental and judicial bodies, regulators, associations and federations of the insurance industry, banks, payment settlement agents, third party payment service providers and claims investigation organizations, for the purpose of the administration of your insurance policies and the provision of product(s) and service(s) to you. Currently, we provide your personal data to China Pacific Life Insurance Co., Ltd. (life.cpic.com.cn/xrsbx/) which is located in Mainland China for processing for the purpose of providing you with the product(s) and service(s), with the types, purposes and methods as set out in our Personal Information Collection Statement.

The recipient(s) of your personal data may collect and process your personal data and return to us for the purpose of the administration of your insurance policies. The types of personal data that we provide to the recipients include without limitation personally-identifiable information, your medical information, your past health records/information, and your financial information. We may deliver your personal data through electronic means or other mode of dispatch to the recipients to process such information for us in accordance with our instructions and in compliance with our privacy policy as well as any other appropriate confidentiality and security measures. In compliance with the applicable rules and regulations of Mainland China, we implement maximum security in controlling, processing and transferring of your personal data and Sensitive Personal Data. We also adopt our own security policies to safeguard your personal data and Sensitive Personal Data.

In addition to the access rights set forth in our Personal Information Collection Statement, you have the right to obtain a copy of your personal data held by us, the right to withdraw consent to use of such personal data, the right to restrict or object processing of such personal data and the right to request us to delete such personal data under any of the following circumstances:

- where the purposes of processing your personal data have been achieved or have failed to be achieved, or the personal data is no longer necessary for achieving the purposes;
- where we have ceased to provide the product(s) or service(s), or the retention period has expired;
- where you have withdrawn your consent; and
- where we have violated the applicable data protection laws and regulations.

You may withdraw your consent to our use of your personal data by contacting us through the contact details set out in this Privacy Addendum. If you withdraw your consent to our processing of your personal data, we may not be able to provide the relevant product(s) and/or service(s) to you. If you wish to exercise any of your rights under the Personal Information Protection Law of China, you may make your request by writing to our Data Protection Officer at Suite 2208, 22/F, Tower 2, The Gateway, 25 Canton Road, Tsim Sha Tsui, Hong Kong.

To the extent inconsistent with the provisions of this Privacy Addendum, including but not limited to definitions (e.g., Sensitive Personal Data), China's Cybersecurity Law, Personal Information Protection Law, Data Security Law, their implementing measures and other Chinese laws and regulations in relation to cybersecurity and data protection will prevail.

We have the right to update this Privacy Addendum from time to time and we will notify you of our updates to this Privacy Addendum by posting it on our website or application platforms (as the case may be).