

Request for Policy Service Form – Investment Linked / Universal Life Insurance
保單服務申請表 – 投資相連 / 萬用壽險

CONSULTANT INFORMATION 顧問資料			
Name 姓名	District/Branch 區域 / 分行	Code 編號	Contact Phone no. 聯絡電話

CUSTOMER INFORMATION 客戶資料			
Policy No. 保單號碼	Name of Policy Owner 保單主權人姓名	Name of Life Insured 受保人姓名	

Please refer to Important Notes overleaf before completing this form. 填寫此申請表前，請參閱背頁之重要事項。

<input type="checkbox"/> 1	Change of Regular Investment / Contribution Amount 更改定期投資 / 定期供款金額 New Annual Regular Amount \$ _____ (The amount must meet the minimum requirement specified by the Company 最低金額須按公司之規定)														
<input type="checkbox"/> 2	Payment for Lump Sum Investment 繳交整筆投資 Deposit amount (US\$ / HK\$) _____ (The amount must meet the minimum requirement specified by the Company 最低金額須按公司之規定) a. <input type="checkbox"/> follow Contribution Allocation Schedule / Investment Mandate 按照供款分配指示 / 投資委託書 b. <input type="checkbox"/> according to instruction below 按照下列指示														
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<input type="checkbox"/> 4	Change of Contribution Allocation Schedule / Investment Mandate 更改供款分配指示 / 投資委託書 Fund Allocation (Minimum 10% for each fund selected in integers) 基金分配 (每項所選基金最少分配 10%，並須為整數)														
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<input type="checkbox"/> 5	Others/Special Instruction 其他 / 特別指示 (please specify details 請註明詳情)														

Company Endorsement 公司批註

SIGNATURE 簽署		
Policy Owner 保單主權人	Witness 見證人	Date (dd / mm / yyyy) 日期 (日 / 月 / 年)
	Name 姓名	

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SV	Captured by	Approved by



/RPS

Important Notes:

重要事項：

- (1) Subject to the provisions stated in the policy, the completed and signed forms must be received by our Policy Administration Services by 4:00pm on a business day (except Saturdays and Sundays) in order for the fund switching to take place on the following valuation day.
在符合保單合約內之條款的規定下，已填妥及簽署的申請表須於每個營業日(星期六及星期日除外)下午四時正前交到保單行政服務部，以便於下一個估值日進行有關基金轉換交易。
- (2) If more than one instruction is received in respect of the same/ different transactions for the same policy on any single day, Sun Life Hong Kong Limited (hereinafter called "the Company") will rely on the last received instruction and has the sole discretion to determine the validity and/ or priority in dealing with such instructions.
倘若香港永明金融有限公司(以下稱為「公司」)於任何一日收到閣下就此保單的相同或不同交易發出超過一項指示，公司只會處理最後收到之指示及可全權酌情決定該等指示之有效性及處理先後次序。
- (3) If any contributions are pending for investment or processing or any transaction for the same policy is in progress at the date of receipt of this instruction, the Company has the sole discretion to determine the priority in dealing with such instructions or to defer this instruction. In such circumstances, there may be some delay in executing such an instruction or instructions and the Company shall not be liable for any loss or damages whatsoever or howsoever arising from such delay.
倘若公司於收到此申請表時就此保單仍有未完成或進行中的供款或任何進行中的交易，公司可全權酌情決定該等指示的處理先後次序或延遲處理閣下指示。在該等情況下，該等指示之執行或會出現延遲，公司毋須對因延遲而招致的任何損失或損項承擔責任。
- (4) Please clearly indicate your instruction and provide full and precise Fund name(s) for your instruction to be executed. Any incomplete instruction will result in a delay in processing your instruction and the Company shall not be liable for any loss or damages whatsoever or howsoever arising from such delay.
為準確執行閣下的指示，請以全寫及準確地指示所選擇的基金名稱。如指示不完整，將導致指示被延遲處理，公司毋須對因延遲而招致的任何損失或損項承擔責任。
- (5) If for any reason we cannot process your instruction in full, we will not process any portion of the instruction.
如任何原因不能完整處理閣下的指示，公司不會處理此申請表的任何部份。
- (6) Only the existing account balance will be switched out. Your switching instruction will not apply to contributions in process. If you want to change your investment choice for future contributions, please complete the "Change of Contribution Allocation Schedule / Investment Mandate" section on the relevant policy change form.
只有現存的帳戶結餘將被轉移，而閣下的轉換指示並不包括處理中的投資供款。如欲更改日後供款的投資選擇，請填妥有關保單更改申請表內「更改供款分配指示 / 投資委託書」。
- (7) Future contributions will be allocated according to your instructions. Except for Lump Sum Investment contributions pending for investment at the date your investment mandate was affected will be allocated according to your instructions. For Lump Sum Investment your money will be allocated according to the separate instructions you gave on the "Payment for Lump Sum Investment" section on the form. If you want to change the investment choice for your existing balance, please complete the "Fund Switching" section on the form.
閣下日後的供款將會根據閣下的指示作投資。除整筆投資外，於此投資委託書生效時仍在處理中的投資供款亦將根據閣下的指示進行投資買賣，而整筆投資則會根據閣下於申請表內「繳交整筆投資」的指示另作安排。如欲轉換現有的結餘至其他投資基金，請填妥申請表內「轉換基金」部分。

Investment involves risk. Past performance is not necessarily a guide to future performance.
投資附帶風險，過往業績不能作日後表現的指引。