



## 1 Fund Switching 基金轉換

### Switch Out 轉換出

- ALL of my existing holdings 我現在持有的全部基金
- The selections below 以下選擇的基金

Please "✓" the appropriate option and provide necessary details (if applicable)  
請「✓」適當選項及提供有關資料(如適用)

Fund Name / Code in Full 基金全名/編號

Percentage (%) / Amount  
百分率(%) / 金額

Suspended funds cannot be switched  
暫停交易的基金不可轉換

Please state the percentage(s) or amount(s) in whole number  
基金之百分率或金額必須為整數

### Switch In 轉換入

Fund Name / Code in Full 基金全名/編號 (Minimum 最少 5%)

Percentage (%) / Amount  
百分率(%) / 金額

Switch In and Switch Out cannot be processed on the same fund at the same time  
不可同時賣出及買入同一基金

Please state the percentage(s) or amount(s) in whole number  
基金之百分率或金額必須為整數

The total percentage must equal 100%  
基金百分率必須合共為 100%

## 2 Change of Contributions Allocation Schedule / Investment Mandate 更改供款分配指示 / 投資委託書

### Fund Allocation 基金分配

Fund Name / Code in Full 基金全名/編號 (Minimum 最少 5%)

Percentage (%)  
百分率

Please state the percentage(s) in whole number and the total must equal 100%  
基金百分率必須為整數並合共為 100%

Total 合共 100%

## 3 Personal Data Collection and Use 個人資料收集及使用

I/We confirm that I/We have read the Personal Information Collection Statement ("PICS") of Sun Life and understood its effect and impact in respect of my/our personal data collected or held by the Company (whether contained in this form or otherwise). 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 PICS, including the use and provision of my/our personal data for the purpose of direct marketing subject to my/our right of objection. I/We understand that the updated version of the PICS is available in the Company website (<http://www.sunlife.com.hk>). I/We understand it is subject to change and agree that my/our information will be handled accordingly.

本人/我們確認本人/我們已閱讀永明金融個人資料收集聲明(「該聲明」)及明白該聲明對貴公司所收集或持有之本人/我們的個人資料的影響(不論是否此表格或從其他途徑所取得)。本人/我們特此確認並同意貴公司,根據該聲明使用及轉移本人/我們的個人資料,包括於本人/我們保留反對權利的情況下,在直接促銷中使用及將本人/我們的個人資料提供予其他人士。本人/我們明白該聲明的最新版本可於貴公司網頁(<http://www.sunlife.com.hk>)下載。本人/我們明白該聲明將會不時更新並同意本人/我們的個人資料將根據相關更新處理。

## 4 Declaration & Authorization 聲明及授權

I/We confirm that, by signing below, I/We have read, fully understood and agreed to the notes throughout the form.  
本人/我們已細閱,完全明白及同意本表格的注意事項並簽署作實。

I/We understand that this policy service instruction is bound by the policy provisions of the above policy.  
本人/我們明白上列的保單服務指示不須受上述保單的條款約束。

I/We confirm that I/We have evaluated the level of risk of the underlying fund/investment myself/ourselves and have selected the investment option(s) for the purposes of the policy based on my/our own judgement and personal needs.  
本人/我們已評估各相關基金/投資之風險水平。本人/我們依據本人/我們的判斷和個人需要作出此保單之投資選擇。

本人/我們明白投資附帶風險及投資價格可升可跌。過往業績不能作日後表現的指引。

I/We understand that investment involves risk and the value of investment may go down as well as up. Past performance is not necessarily a guide to future performance.  
本人/我們明白投資附帶風險及投資價格可升可跌。過往業績不能作日後表現的指引。

I/We declare that on behalf of myself/ourselves and other persons referred to in this request ("Relevant Persons") that all information in this application whether or not written by my/our own hand are to the best of my/our knowledge and belief complete and accurate.  
本人/我們謹此代表本人/我們及其他人在此表格提及之人士("相關人士")聲明及同意上述一切資料,不論是否本人/我們親手填寫,就本人/我們所知所信,均為事實之全部及並確實無訛。

I/We declare and agree that I/We have the full authority from and consent of the Relevant Persons to make the above declarations, agreements and authorizations. 本人/我們聲明及同意已獲相關人士授權及同意本人/我們作出上述聲明、協議及授權。

## 5 Signature 簽署

X

Signature of Policy Owner  
保單主權人簽署

D | D | M | M | Y | Y | Y | Y

Date (DD/MM/YYYY)  
日期(日/月/年)