

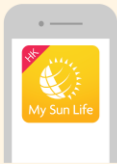
Withdrawal – Universal Life Insurance

提取保單款項 – 萬用壽險



Policy Number
保單號碼

Name of Policy Owner
保單主權人姓名



My Sun Life HK Mobile App 流動應用程式

Manage your policy at your fingertips 24/7
保單管理 隨時一觸實現



View coverages
查閱保障額



Premium due notifications
繳費提示



Manage your funds
管理基金



Update personal details
更新個人資料



Professional support
專業團隊支援



Scan this QR code or go to the link below to learn more
掃描此二維碼或瀏覽以下網址了解更多
sunlife.com.hk/MySunLifeapp

To ensure that you can enjoy our quality service, we would like to invite you to update your contact details on My Sun Life HK or by completing the below section:

為確保您能享受完善的服務體驗，我們誠邀您透過 My Sun Life HK 應用程式或填寫以下部份更新您的聯絡資料：



Email 電郵



Mobile 手提

Country Code
國家代碼

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Please return this form to Sun Life Hong Kong Limited ("the Company") within 30 days after signing.
請於簽署此表格後 30 天內交回香港永明金融有限公司 (「公司」) 處理。



Important Notes 重要事項

- Please complete this form by typing or in clear handwriting. Any amendments should be endorsed by the Policy Owner in full signature.
請清楚地填寫此表格。任何資料如有更改，保單主權人必須在更改的位置簽署作實。
- 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.
如指示不完整，將導致指示被延遲處理，倘若公司毋須對因延遲而招致的任何損失或損項承擔責任。
- For some universal life policies, we may automatically reduce the Sum Assured of all life coverages then in effect under your policy by their proportionate share of the withdrawal. The minimum Sum Assured after withdrawal is subject to the minimum Sum Assured requirements specified by the Company. Otherwise, your policy shall be terminated. Please refer to your policy provisions for further details.
部份萬用壽險產品的身故賠償選擇若為固定保額，當提取款項後，受保人的人壽保障總額可能會相應調低。提取款項後的最低保障額須按本公司規定，否則，閣下的保單將會終止。詳情請參閱保單條款。
- Once the form is submitted to the Company, whether through the Company consultant or your broker or otherwise, you cannot withdraw or change any of the instructions provided on the form. Any change of instructions will be treated as a new request, which will be processed after the former request is effected by the Company.
此表格一經遞交給公司，不論是經由公司理財顧問、閣下的經紀，或由其他途徑遞交，閣下便不能取消或更改表格上的任何指示。任何更改，將被視作一項新申請，而該新申請會在將閣下先前的申請辦妥後處理。



1 Withdraw of Policy Value 提取保單價值

Account Value
戶口價值

Amount 金額

Or 或

Withdraw All 全數提取

Others (Please Specify)
其他 (請註明) :

Amount 金額

Or 或

Withdraw All 全數提取

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



2 Payment Instruction 付款指示 – By Cheque 支票

Cheque Currency
支票貨幣

HK Dollars 港幣 *

Policy Currency 保單貨幣**

Please "✓" the appropriate option
請「✓」適當選項

* When issuing a HKD cheque for foreign currency policies, the Company's daily exchange rate upon the cheque issuance will apply 就外幣保單發出港元支票時，將以公司出票當日之兌換率計算

** For USD policy, a local USD cheque will be issued unless otherwise specified 如無特別指示，美元保單主權人將獲發本地結算之美元支票

2018.09



Withdrawal – Universal Life Insurance

提取保單款項 – 萬用壽險



2 Payment Instruction 付款指示 – By Cheque 支票 (Continued 續)

Cheque to be
支票將

Posted to my correspondence address 郵寄至本人通訊地址

Delivered via my consultant 由本人之顧問轉交

Collected at Financial Café 親臨理財軒領取 -

Contact no. 聯絡電話:

If cheque will be collect by a third party, please provide
the name and ID number:

如由第三者領取支票，請提供姓名及身份證號碼：

(Name 姓名)

(ID Number 身份證號碼)

Amount to be
金額將轉往

Policy no. 保單號碼 as 作為

Premium and Levy Settlement 繳付保費及保費徵費

Loan repayment 償還貸款

Others (please specify) 其他 (請註明) :

If payment is to be transferred to a policy
that is not owned by you, please also
complete the "Third Party Payment
Declaration Form"

如欲轉移款項至非閣下名下的保單，請同時填
寫「第三者付款聲明書」

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須受上述保單的條款約束。

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 Required Item and Signature 所需項目及簽署

The below item is required to complete your request

保單主權人需要提供以下項目以完成閣下之申請

Copy of the Policy Owner's identification proof (if not provided before)
保單主權人身份證明文件副本(若之前未曾提交)

X

Signature of Policy Owner / Assignee (if any)
保單主權人 / 受讓人(如有)簽署

X

Signature of Irrevocable Beneficiary
不可撤換受益人簽署

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

Date (DD/MM/YYYY)
日期(日/月/年)

Summary of Policy Loan and Withdrawal Minimum Amount

保單貸款和提取款項最低金額摘要

For Reference Only 只供參考

Specific details are contained in the Product Brochure. Please refer to a sample Product Brochure and Policy Document, which will be provided upon request for details, including definitions and full terms and conditions. If there is any conflict between the Product Brochure, Policy Document and this summary, the Policy Document shall prevail.

具體詳情載於產品銷售書。有關釋義、完整的條款及細則及除外責任的詳情，請參閱保單文件樣本。我們將應您要求提供有關文件。如果此摘要與產品銷售書或保單文件內容不符，則以保單文件為準。

i Universal Life Insurance 萬用壽險

Product Name 產品名稱	Minimum Withdrawal Amount 最低提取金額	Minimum Policy Value after Withdrawal 提款後最低保單價值	Minimum Loan Amount 保單貸款最低金額	Maximum Loan Amount 保單貸款最高金額
BRIGHT Achiever 明智豐裕保	USD 美元 500	USD 美元 500	USD 美元 100	N/A 不適用
BRIGHT Universal 明智萬用壽險	USD 美元 100 RMB 人民幣 700 HKD 港幣 800	Sum Assured 保障額: HKD 港幣 8000 USD 美元 1000	USD 美元 100 RMB 人民幣 700 HKD 港幣 800	N/A 不適用
BRIGHT UL Wealth-Builder 明智創富萬用壽險	USD 美元 1000	Equal to Surrender Value 等於退保價值	USD 美元 100	N/A 不適用
BRIGHT UL Eternal Builder 明智諾延萬用壽險	USD 美元 2,000	USD 美元 5,000 and maintain sum assumed at least 並保持保障額最少 USD 美元 1,000,000	USD 美元 10,000	80% of the surrender value 退保價值的 80%
Futurity 非凡投資壽險計劃	USD 美元 100	Equal to Surrender Value 等於退保價值	N/A 不適用	N/A 不適用
Power One Universal Life 動力萬用壽險	USD 美元 100 HKD 港幣 800	Equal to Surrender Value 等於退保價值	USD 美元 100 HKD 港幣 800	N/A 不適用