

Change of Regular Premium Amount & Lump Sum

更改定期保費金額及一筆過供款

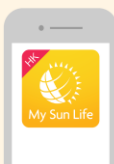


Policy Number

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

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。

With effect from 1 January 2018, levy collected by the Insurance Authority has been imposed on relevant policy at the applicable rate. For further information, please visit our company website (www.sunlife.com.hk) or contact our Client Service Hotline (852) 2103 8928.

由 2018 年 1 月 1 日起，保險業監管局收取本保單的保費徵費已按照適用的徵費率徵收。更多有關保費徵費資料，請瀏覽本公司網頁 (www.sunlife.com.hk) 或致電客戶服務熱線 (852) 2103 8928。



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。
- Subject to the provisions stated in the policy, the completed and signed forms must be received by Policy Administration Services of the Company by 4:00 p.m. on a business day (except Saturdays, Sundays and public holidays) in order for the fund redemption to take place on the following valuation day.
在符合保單合約內之條款的規定下，已填妥及簽署的表格須於每個營業日（星期六、星期日及公眾假期除外）下午四時正前交到公司保單行政服務部，以便於下一個估值日進行有關基金贖回交易。
- The Company shall not be liable for any loss or damages, whatsoever or howsoever arising from delay in processing your instruction in any of the circumstances including but not limited to the below:
 - Any incomplete or unclear instruction resulting that we cannot process your instruction in full, we will not process any portion of the instruction.
 - If more than one instruction is received in respect of the same/different transactions for the same policy on any single day, the Company has the sole discretion to determine the priority in dealing with such instructions or to defer such instructions.
 - If any contribution(s) is pending for investment or processing or any transaction for the same policy is in progress at the date of receipt of this form, the Company has the sole discretion to determine the priority in dealing with such instructions or to defer such instructions.公司毋須對因延遲處理閣下的指示而招致的任何損失或損項承擔責任，包括但不限於以下情況：
 - 任何不完整或不明確的指示導致不能完整處理閣下的指示，公司不會處理此表格的任何部份。
 - 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。
 - 公司於收到此表格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。
- 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。
- For lump sum:** The amount paid in by you will first be used to settle the required levy, and the balance will be applied for investment, unless otherwise specify.
一筆過供款：除非另有說明，閣下所繳付之金額將先行用作繳付保費徵費，餘額將用作投資。

For investment-linked insurance 對於投資相連壽險：

- Investment involves risk. If at any point of time you are in doubt whether your investment options is/are suitable for you, you should seek independent advice.
投資涉及風險。在選擇基金作為投資時，若於任何時刻閣下對於閣下的投資選擇是否適合閣下有任何疑問，閣下應徵詢獨立意見。
- Please refer to the Company website www.sunlife.com.hk for more details on your investment options.
有關投資選擇的詳情，請瀏覽公司網頁 www.sunlife.com.hk。

➤ Please **DO NOT** use this form for **Traditional Policy**.

如果您的保單是傳統人壽保單，請不要使用此表格。

2018.09



/LRP

Change of Regular Premium Amount & Lump Sum

更改定期保費金額及一筆過供款



For **increase of regular contribution or lump sum investment**, please submit the following document with this request To comply with the requirements set out by the Hong Kong Federation of Insurers under the "Initiative on Financial Needs Analysis":

如欲增加定期供款金額或作一筆過供款，請同時遞交以下文件以符合香港保險業聯會於《財務需要分析》中訂明要求：

The **instruction will only be processed after ALL required document(s) and payment are received.**

閣下之指示將於所有有關文件及款項收妥後始進行。

Documents 文件	Financial Needs Analysis (FNA) 財務需要分析	Risk Profile Questionnaire (RPQ) 風險承擔問卷	Important Fact Statement (IFS) and Applicant's Declarations 重要資料聲明書及申請 人聲明書
Product Type 產品類別			
Investment-linked insurance 投資相連壽險	✓	✓	✓
Universal life insurance 萬用壽險	✓	N/A 不適用	N/A 不適用

In addition to the above documents, clients being holder of Resident Identity Card / Passport of People's Republic of China must submit the following documents:

除上列文件外，持有中華人民共和國居民身份證/護照的內地人士須同時遞交：

- ✓ Important Facts Statement for Mainland Policyholder ("IFS-MP")
重要資料聲明書 -- 內地人士在港投購壽險保單 ("重要資料聲明書")
- ✓ PRC Resident Declaration 中華人民共和國居民聲明書

1 Change of Regular Premium Amount 更改定期保費金額

New Regular Premium Amount
(in Policy Currency)

新定期保費金額 (保單貨幣)

\$

- 每年 Annually *
- 每月 Monthly *

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

The amount must meet the minimum
requirement specified by the Company
最低金額須符合公司之要求

*For change of Payment Mode, please
complete the "Request of Policy Change"
form
如需更改付款形式，請填寫「保單更改申請」
表格

2 Lump Sum Investment / Payment 一筆過供款

Lump sum amount (in policy currency)

一筆過供款金額 (保單貨幣)

\$

The amount must meet the minimum
requirement specified by the Company
最低金額須符合公司之要求

For **investment-linked insurance**, please confirm the fund allocation

對於投資相連壽險，請確認供款分配

- Follow existing Contribution Allocation Scheme / Investment Mandate
按照現時供款分配指示 / 投資委託書

- According to the allocation stated below 按照下列分配指示
(It only applies to this application and will NOT affect existing Investment Mandate
只適用於是次申請，並不影響現時供款分配指示)

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)

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%

Fund Name / Code in Full 基金全名/編號 (Minimum 最少 5%)	Percentage (%) 百分率

Total 合共 100%

Change of Regular Premium Amount & Lump Sum

更改定期保費金額及一筆過供款

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。

For investment-linked insurance 投資壽險保單:

I/We confirm that I/We have evaluated the level of risk of the underlying fund/investment myself/ourselves and have selected the investment options for the purposes of the policy based on my/our own judgement and personal needs.

本人 / 我們已評估各基金 / 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。

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。

5 Required Items and Signature 所需項目及簽署

The below items are 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

- Financial Needs Analysis
財務需要分析
- Risk Profile Questionnaire – Applicable to Investment Linked Insurance Policy only
風險承擔問卷 – 只適用於投資相連壽險保單
- Important Fact Statement (IFS) and Applicant's Declarations – Applicable to Investment Linked Insurance Policy only
重要資料聲明書及申請人聲明書 – 只適用於投資相連壽險保單
- Important Facts Statement for Mainland Policyholder ("IFS-MP") – Applicable to holder of PRC ID / Passport
重要資料聲明書 – 內地人士在港投購壽險保單 ("重要資料聲明書") - 只適用於持有中華人民共和國居民身份證 / 護照的內地人士
- PRC Resident Declaration – Applicable to holder of PRC ID/Passport
中華人民共和國居民聲明書 – 只適用於持有中華人民共和國居民身份證 / 護照的內地人士
- Direct Debit Authorization – Applicable to Change of Regular Premium Amount
直接付款授權書 – 只適用於更改定期供款金額
Or 或
Premium (Lump Sum or Regular Premium)
保費 (一筆過供款 / 定期保費)
- Request for Policy Change form – Applicable if there is a Change of Payment Mode
保單更改申請 – 只適用於需更改付款形式

X

Signature of Policy Owner
保單主權人簽署

Date (DD/MM/YYYY)
日期 (日 / 月 / 年)

<PLEASE DO NOT SIGN A BLANK FORM 請勿在空白表格上簽署>