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在索取、列印或填寫表格前，請閣下先詳閱下文。

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## 免責聲明

閣下凡透過富通保險有限公司 [富通保險] 之電子收發渠道 [如公司網站、互動語音回應系統] 下載或列印任何表格，應自行考慮及衡量需承擔之風險。富通保險概不負責任何因下載或列印表格所引致的列印錯誤及其可能導致之任何損失或毀壞。若閣下提交之下載或列印表格有任何列印錯誤，富通保險有可能在處理閣下的申請前要求閣下填寫一份正確之表格。

當閣下填寫及簽署由網站下載之表格 [互聯網列印表格]，則被視作閣下已詳閱及明白電腦螢幕上出現之表格 [閱覽表格] 之內容，並同意表格內之所有條文。如該閱覽表格與互聯網列印表格出現任何不符、矛盾或分歧時，閣下同意並承諾不會提出任何異議。如閱覽表格與互聯網列印表格出現任何不符、矛盾或分歧時，概以閱覽表格為準。

富通保險有權隨時在認為適當情況下更新表格內容，並保留接受或拒絕閣下遞交之申請表格的權利。

萬用壽險計劃服務申請書  
Universal Life Plan Service Request Form



保單號碼 Policy Number (the Policy)	<input type="text"/>	保險代理人/ 保險經紀姓名 Name of the Insurance Agent / Insurance Broker	<input type="text"/>
保單持有人姓名 Name of Policy Owner	<input type="text"/>	保險代理人/ 保險經紀編號 Insurance Agent / Insurance Broker Code	<input type="text"/>
受保人姓名 Name of Insured	<input type="text"/>	保險代理人/保險經紀電話號碼 Insurance Agent / Insurance Broker Telephone No.	<input type="text"/>

請在適當的方格加上「剔」號(✓) Please "Tick" (✓) as appropriate.

本人/我們現要求富通保險有限公司(「富通保險」)接納以下的申請。本人/我們明白富通保險根據以上保單的保單條款有權拒絕該項申請。  
I/We hereby request FTLife Insurance Company Limited ("FTLife") to accept the following request. I/We understand that FTLife has rights to decline acceptance of such request in accordance with the policy provisions of the above policy.

第一部份 提取賬戶價值  
Part 1 Withdrawal of Account Value

**重要提示 Important Notes**

- 富通保險有權就每一次賬戶價值之提取徵收退保費用。詳情請參閱保單資料說明及保單條款。富通保險將會從被要求提取的賬戶價值中扣除退保費用後才向閣下付款。  
FTLife has the right to impose a surrender charge for each withdrawal of account value. Please refer to Policy Specifications and Policy Provisions for details. FTLife will deduct the surrender charge from the account value requested to be withdrawn before making payment to you.
- 每次提取金額及提取後之最低賬戶餘額要求須符合本申請書的末頁之最低金額要求。  
The amount of each withdrawal and the minimum account balance immediately after withdrawal are object to the requirements as listed in the last page of this form.
- 於首兩個保單年度內，閣下只可從額外賬戶提取金額。提取次序為先從額外賬戶（如有）以先入先出原則提取，然後從基本賬戶以先入先出原則提取（只適用於「盛利保」萬用壽險保障計劃）。  
In the first two policy years, account value can only be withdrawn from the Top-up Account. The withdrawal sequence is first-in-first-out from the Top-up Account (if any) and then first-in-first-out from the Basic Account (Only applicable to 「Wealth Achiever」 Universal Life protection plan)

提取賬戶價值金額 Amount of Account Value to be withdrawn: 美元 US\$ \_\_\_\_\_

第二部份 保單貸款  
Part 2 Policy Loan

**重要提示 Important Notes**

- 只適用於「盛利保」萬用壽險保障計劃  
Only applicable to 「Wealth Achiever」 Universal Life protection plan.
- 閣下只可於第一個保單週年日後，在保單存有淨賬戶價值期間申請保單貸款。  
You may apply for Policy loan only after the first Policy anniversary when the Policy has a Net Account Value.
- 富通保險對其將保單貸款須收取利息，息率由富通保險釐定。現時年利率為8.5%。富通保險有權不時調整息率。當富通保險批准此保單貸款申請時，我們會書面通知你所收取的息率。在任何保單週年日未繳付的利息將被納入貸款本金並按相同息率計算所須收取的利息。Policy loan will bear interest at a rate determined by FTLife (currently is 8.5% per year) FTLife has the right to change the interest rate from time to time. FTLife shall notify you in writing of interest being charged at the time it approve(s) this policy loan application. Unpaid interest at any Policy Anniversary will be added to the principal of such loan and will bear interest at the same rate.
- 您可以隨時償還全部或部份保單貸款及應付而未付的利息。富通保險將從保單的任何給付金額（如保單退保價值或身故收益）中先行扣除。任何未償還的保單貸款及其貸款利息。  
Policy loan and outstanding interest may be repaid in full or in part at any time. Any unpaid policy loan and its unpaid loan interest will be deducted from any amount payable under the Policy (such as policy surrender value, or death proceeds)
- 倘若淨賬戶價值相等於或少於零，上述保單將根據保單條款被終止。  
If the net account value falls to zero or below, the above policy will be terminated in accordance with the policy provisions.
- 任何與保單貸款有關之通知寄往保單持有人及受讓人在富通保險的記錄最後為人所知的郵政地址，將被視為妥為送達。  
Any notice in connection with the policy loan addressed and mailed to the last known postal address of the Policy Owner and of any assignee in the record of FTLife, shall be deemed to have been duly given.

借貸金額為美元 Amount of Loan is US\$ \_\_\_\_\_

\* C S 0 0 7 3 \*

第三部份 額外保費  
Part 3 Top-up Premium

**重要提示 Important Notes**

1. 請同時填妥並遞交「申請人資料分析表格」。  
Please also complete and submit the "Applicant Information Analysis" form.
2. 額外保費須受載於本申請書的末頁的限制約束。  
Top-up Premium is subject to the restrictions as listed on the last page of the form.

合共額外保費: 美元\$ \_\_\_\_\_, 包括:

Total Top-Up Premium: US\$ \_\_\_\_\_, consisting of:

(i) 連同此表格所繳交之額外保費: 美元 \_\_\_\_\_  
Top-Up Premium paid with this form: US\$ \_\_\_\_\_

支票 / 本票 / 直接存款 / 轉賬至本公司戶口 Cheque / Bank Draft / Direct Deposit or Transfer to the company bank account

電匯 / 電子繳費 Telegraphic Transfer / Electronic Payment

付款 / 轉賬日期 Date of Payment/Transfer: \_\_\_\_\_

其他 (請註明) Others (Please specify): \_\_\_\_\_

(ii) 非連同此表格所繳交之額外保費: 美元 \_\_\_\_\_

Top-Up Premium not paid with this form: US\$ \_\_\_\_\_

**付款指示 Payment Instructions** (適用於第一及第二部份之申請) (Applicable to applications under Part 1 & Part 2)

款項將以港幣支票形式發放並寄往保單持有人的通訊地址。如欲更改以上付款方式，請在適當位置加上“✓”剔號。

**Payment will be made in Hong Kong dollar cheque and will be sent to the Policy Owner's correspondence address.** If you want to change the above method of payment, please tick "✓" where appropriate

請以美元支票 (本港/中國大陸兌現) 形式發放。(註: 不適用於保單貨幣為港元之保單)  
Please issue cheque in US dollar (HK/Mainland China clearance). (Note: Not applicable to the policy which policy currency is HKD)

請以美元本票 (海外兌現) 形式發放。(註: 不適用於保單貨幣為港元之保單)  
Please issue bank draft in US dollar (foreign clearance). (Note: Not applicable to the policy which policy currency is HKD)

請將支票轉交本人之保險代理人/保險經紀。  
Please send the cheque to my Insurance Agent / Insurance Broker.

請通知本人到位於 \_\_\_\_\_ 之客戶服務中心提取。本人之聯絡電話為 \_\_\_\_\_。  
Please notify me to pick up the cheque at your Customer Service Centre at \_\_\_\_\_. My contact number is \_\_\_\_\_.

請將款項轉到由本人持有的下列保單作下列用途:  
Please transfer the amount to the following policy which is also owned by me for the purpose listed below:

保單號碼 Policy No.	金額 Amount	用途 Purpose
		<input type="checkbox"/> 首次保費 New Business Premium <input type="checkbox"/> 續期保費 Renewal Premium <input type="checkbox"/> 保單更改按金 Deposit for Change <input type="checkbox"/> 償還保單貸款 Policy Loan Repayment

**收集個人資料聲明 Personal Information Collection Statement**

在富通保險有限公司 (以下簡稱“富通保險”)，保護客戶的個人資料私隱是富通保險所持的其中一個核心價值。作為一個提供保險產品和服務的公司，客戶的個人資料收集和使用是富通保險業務的重要一環。我們尊重您的個人資料的私隱，並致力於完全遵守“個人資料 (私隱) 條例” (以下簡稱“條例”)。  
At FTLife Insurance Company Limited ("FTLife"), we hold as one of our core values the protection of privacy of our customer's personal data. As a provider of insurance products and services, collection and use of personal data of our customers is at the heart of our business. We respect the privacy of your personal data and are committed to fully complying with the Personal Data (Privacy) Ordinance ("the Ordinance").

**1. 富通保險所收集及/或持有的個人資料 Personal Data collected and/or held by FTLife**

我們所收集及/或持有的個人資料 (不論是否從此表格或以其他方式獲得) 包括您的個人資料，聯絡資料，保單資料，交易記錄，學歷及培訓資料，就業資料，財政資料，醫療及健康記錄和您的家庭、生活方式及社會環境資料。

The personal data that we collect and/or hold (whether contained in this form or otherwise obtained) includes your personal details, contact information, policy details, transaction records, education and training details, employment details, financial details, medical and health records and information on your family, lifestyle and social circumstances.

**2. 收集個人資料的重要性 Importance of Personal Data Collection**

富通保險會不時地要求您提供您的個人資料。您提供個人資料予富通保險是出於自願的。然而，如果您沒有按我們所要求而提供您的個人資料予富通保險，富通保險可能無法提供或繼續提供產品和服務給您。

From time to time, you will be requested to provide your personal data to FTLife. Provision of personal data to FTLife by you is voluntary. However, FTLife may not be able to provide or continue to provide products and services to you if you fail to provide your personal data as requested by us.

**3. 個人資料收集和使用的目的 Purposes of Personal Data Collection and Usage**

富通保險所持有您的個人資料可能會用於以下目的:

Your personal data held by FTLife may be used for the following purposes:

i. 保險管理或再保險業務有關的用途，其中包括承保，處理和評估申請，身份和信用檢查，適用性檢查，保單服務，作為抵押貸款轉讓安排 (如為保費融資而作)，理賠處理，調查，帳戶/債務追收，訴訟，通訊，製作統計，數據分析和研究，內部/外界審計，保持優質的服務，銷售和促銷，建設企業品牌和建設客戶忠誠度的活動;

administration of insurance or reinsurance related business, which includes underwriting, processing and evaluation of applications, identity and credit checking, suitability checking, policy servicing, collateral assignment arrangement (e.g. for premium financing purpose), claims processing, investigation, account/debt collection, litigation, communications, preparing statistics, data analysis and research, internal and external audit, maintaining quality services, sales and marketing, corporate brand building and customer loyalty building;

- ii. 直接促銷，包括透過電子或其他的渠道推廣，促銷或銷售富通保險的保險或保險相關的產品或服務及/或由第三者金融機構所提供及/或促銷的任何金融相關的產品或服務；及  
direct marketing, which includes promoting, marketing or selling, of FTLife insurance or insurance related products or services and /or any financial related products or services provided and/or marketed by third party financial institutions by electronic or other means; and
- iii. 為遵守下列適用於富通保險或富通保險應該遵守的有關披露及使用資料的責任、規定或安排：  
complying with the obligations, requirements or arrangements for disclosing and using data that apply to FTLife or with which it is expected to comply according to:
- 在香港境內或境外，現行或將會存在的，並對其具約束力或適用於其的任何法律；  
any law binding or applying to it within or outside Hong Kong existing currently and in the future;
  - 在香港境內或境外，現行或將會存在的，並由任何法定、監管、政府、稅務、執法或其他機構，或由金融服務提供者的自我監管或業界的團體或組織所發出或提供之任何指引或指導；  
any guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of financial services providers within or outside Hong Kong existing currently and in the future;
  - 富通保險因其在本地或海外的司法管轄區或與該司法管轄區相關的金融、商業、營業或其他利益或活動而須承擔與該本地或海外的法定、監管、政府、稅務、執法或其他機構或金融服務提供者的自我監管或業界的團體或組織之間的現有或將來之任何合約承諾或其他承諾。  
any present or future contractual or other commitment with local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of financial services providers that is assumed by or imposed on FTLife by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations.

#### 4. 直接促銷 Direct Marketing

在獲得您的同意下，富通保險可能會使用您的姓名、電話號碼、電郵地址和通訊地址作如第3 (ii) 段所載的直接促銷。請您在以下第8段確認您的同意。如果在您提交此表格後，您不希望收到我們的推廣性要約或信息，請通知我們，我們將立即停止使用您的個人資料，並不收取任何費用。請把您的有關要求以書面通知我們的保障資料主任，其聯絡地址載於第7.3段。

FTLife may use your name, telephone number, email address and correspondence address for direct marketing as set out in section 3(ii) only with your consent. Please confirm if you consent in section 8 below. If subsequent to your submission of this form you do not wish to receive our promotional offers or information, please let us know and we will cease to use your personal data immediately, without any charge. Please send your written request to our Data Protection Officer at the address provided in section 7.3.

#### 5. 個人資料保密 Personal Data Confidentiality

富通保險會對您提供的個人資料加以保密，除了可能會與下列各方共享：

The personal data you provide to FTLife will be kept confidential, except that it may be shared with the following parties:

- 代表您的任何保險經紀，獨立財務顧問或您的受讓人作在第3 (i) 段中所列出的任何用途；  
any insurance broker, independent financial advisor acting on your behalf or your assignee for any of the purposes set out in section 3(i);
- 任何富通保險的附屬公司，控股公司，聯營公司或聯屬公司作在第3 (i) - (iii) 段中所列出的任何用途；  
any subsidiary, holding company, associated company or affiliates of FTLife for any of the purposes set out in section 3(i)-(iii);
- 任何富通保險的代理人，承包商或會向富通保險提供行政、電訊、電腦、網際網路、付款或其他服務的第三方服務供應商（包括但不限於風險分析顧問、損失估價人，私人調查員，信函裝封服務機構及債務追收員）作在第3 (i) 和3 (ii) 段中所列出的任何用途；  
any agent, contractor or third party service provider, including but not limited to providers of risk intelligence, loss adjustors, private investigators, letter shopping service providers and debt collectors who provides administrative, telecommunications, computer, Internet, payment or other services to FTLife for any of the purposes set out in section 3(i) and (ii);
- 任何富通保險的實際或建議再保險公司作在第3 (i) 段中所列出的任何用途；及  
any actual or proposed reinsurers of FTLife for any of the purposes set out in section 3(i); and
- 富通保險在根據對其本身或其任何集團公司具約束力或適用的任何法律規定下的責任或其他原因，或按照及為實施其應該遵守的由任何法定、監管、政府、稅務、執法或其他機構或金融服務提供者的自我監管或業界的團體或組織所提供或發出的指引或指導，或根據與本地或海外之法定、監管、政府、稅務、執法或其他機構或金融服務提供者的自我監管或業界的團體或組織之間的任何合約承諾或其他承諾，而必須對其作出披露的任何人士，而該等人士可能處於香港境內或境外及可能是已存在、現有或將來出現的人士。  
any person to whom FTLife is under an obligation or otherwise required to make disclosure under the requirement of any law binding on or applying to FTLife or any of its group companies, or any disclosure under and for the purposes of any guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of financial services providers with which FTLife is expected to comply or any disclosure pursuant to any contractual or other commitment of FTLife with local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of financial services providers, all of which may be within or outside Hong Kong and may be existing currently and in the future.

#### 6. 移轉個人資料至香港以外的地方 Transfer of Personal Data Outside Hong Kong

富通保險可能會不時地將您的個人資料移轉至香港以外的地方作在第3 (i) 和3 (iii) 段中所列出的任何用途，包括資料處理或貯存。

FTLife may from time to time transfer your personal data outside Hong Kong for any of the purposes set out in section 3(i) and (iii) including data processing or storage.

#### 7. 個人資料的查閱/改正要求 Personal Data Access / Correction Request

7.1 根據條例的規定，您有下列權利：

In accordance with the Ordinance, you have the right to:

- 查詢富通保險是否持有您的個人資料，如有，您有權獲得這些資料的副本；  
check whether FTLife holds personal data about you and, if so, obtain a copy of such data;
  - 要求富通保險糾正任何有關您的不準確的個人資料；及  
require FTLife to correct any personal data relating to you which is inaccurate; and
  - 確定富通保險對個人資料處理的有關政策和做法，並獲告知由富通保險持有您個人資料的種類。  
ascertain FTLife policies and practices in relation to personal data and to be informed of the kind of personal data held by FTLife.
- 7.2 富通保險有權就處理任何個人資料查閱要求收取合理的費用。  
FTLife has the right to charge a reasonable fee for the processing of any personal data access request.
- 7.3 有關要求可向位於香港特別行政區上環干諾道中111號永安中心27樓富通保險有限公司客戶服務中心的「保障資料主任」以書面形式提出。  
Requests shall be made in writing to our Data Protection Officer, FTLife Customer Service Centre, FTLife Insurance Company Limited, 27/F, Wing On Centre, 111 Connaught Road Central, Hong Kong SAR.

#### 8. 同意使用個人資料作直接促銷 Consent for Use of Personal Data for Direct Marketing

富通保險只可在您的同意下使用從您收集的個人資料作直接促銷用途。如果您不希望收到我們的推廣性要約或信息，請在左邊的框中打勾。

FTLife Insurance Company Limited may use the data collected from you for direct marketing purpose only with your consent. If you do not wish to receive our promotional offers or information, please put a tick in the box on the left.

由此文件所示之日開始，此收集個人資料聲明將被視為您富通保險之間已經簽署或準備簽署的所有合約，協定和其他具有約束力的安排的一個組成部分。  
This Personal Information Collection Statement shall from the date hereinafter appearing be deemed to form an integral part of all contracts, agreements and other binding arrangements which you have entered into or intend to enter into with FTLife.

在英文和中文版本之間出現差異的情況下，應以英文版本為準。

In case of discrepancies between the English and Chinese version, the English version shall prevail.

## 聲明及授權 Declaration and Authorization

本人/我們明白上述申請事項得到富通保險批准後，將於批核日或將特別註明的較後日期生效。

I/We understand that my/our request shall take effect on the date of approval of this application or a later date to be specified.

本人/我們明白若此表格的中、英文兩個版本有任何抵觸或不相符之處，應以英文版本為準。

I/We understand that if there is any inconsistency or ambiguity between the English version and the Chinese version of this form, the English version shall prevail.

X	X	X	X
_____	_____	_____	_____
保單持有人及受讓人簽署 (若保單已被轉讓) Signature of the Policy Owner and Assignee (if the policy is assigned)	簽署日期 (日/月/年) Date of Signature (DD/MM/YY)	見證人 / 保險代理人 / 保險經紀簽署 Signature of Witness / Insurance Agent / Insurance Broker	簽署日期 (日/月/年) Date of Signature (DD/MM/YY)
		見證人 / 保險代理人 / 保險經紀姓名 Name of the Witness / Insurance Agent / Insurance Broker (	)

\* 簽署式樣須與投保書或本公司的最後之紀錄相同

\* *Signature must be consistent with that on the application form or company's latest record*

萬用壽險計劃之限制摘要 Summary of the restrictions of Universal Life Plan

提取賬戶價值 Withdrawal of Account Value

計劃名稱 Name of Plan	最低每次提取金額 Minimum amount of each withdrawal	每次提取後最低賬戶結餘及要求 Minimum account balance and requirements after withdrawal
「盛利保」萬用壽險尊尚計劃 "Wealth Achiever" Universal Life Plan	美元 US\$1,000	美元 US\$30,000
「盛利保」萬用壽險保障計劃 "Wealth Achiever" Universal Life Protection Plan	美元 US\$1,000	<ul style="list-style-type: none"> <li>• 最低賬戶餘額要求相等於保單週月日的每月扣款金額的三（3）倍 The minimum account balance after withdrawal equals to three times the amount of monthly deductions of the Policy Monthly Anniversary</li> <li>• 基本賬戶只可在第2個保單週年後申請提取款項，保額可能會因應提取的金額調低，而調減後之保額不可少於美元250,000。 Withdrawal from the Basic Account is only applicable after the second policy anniversary, the withdrawn amount will trigger a decrease of sum insured, the decreased after the 2nd policy anniversary sum insured cannot be less than US\$250,000.</li> </ul>

額外保費 Top-up Premium (額外保費必須於受保人100歲前繳付 Top-up Premiums are only allowed before the insured reaches 100 years of age)

計劃名稱 Name of Plan	最低額外保費金額 Minimum Top-Up Premium Amount	最高額外保費金額 Maximum Top-Up Premium Amount
「盛利保」萬用壽險保障計劃 "Wealth Achiever" Universal Life Protection Plan	美元 US\$10,000	<p>繳交額外賬戶保費後的總賬戶價值 (額外賬戶價值+基本賬戶價值)不得高於「目標值」* 的120%</p> <p>The Total Account Value after payment of Top Up Account premium (Top Up Account value + Basic Account Value) cannot be higher than 120% of the "Target Value"</p> <p>* 「目標值」= 保額 X (1 / 102%)<sup>(100 - 已屆年齡)</sup> + 附加保費(如有)</p> <p>* "Target Value" = Sum insured x (1/102%)<sup>(100 - attained age)</sup> + additional premium (if any)</p>

保單貸款 Policy Loan

計劃名稱 Name of Plan	最低貸款額 Minimum loan amount	
「盛利保」萬用壽險保障計劃 "Wealth Achiever" Universal Life Protection Plan	美元 US\$1,000	(賬戶價值 - 退保費用) x80% - 任何欠款 (Account value – surrender charge) X 80% - Any indebtedness