

Withdrawal – Universal Life Insurance

提取保單款項 – 萬用壽險



Sun Life

永明金融

Policy Number

保單號碼

Name of Policy Owner

保單主權人姓名



You can now easily update your contact details. Just log on to My Sun Life HK and update your Profile. It's that simple!
您現在可以輕鬆更新您的聯繫方式。只需登錄 My Sun Life HK 並更新您的個人資料。就這麼簡單！



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



Manage your funds
管理基金



Professional support
專業團隊支援



Premium due notifications
繳費提示



Update personal details
更新個人資料



eClaims
電子索償



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 you can enjoy our high quality of 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
電郵地址

Mobile
手提 ()

i

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 Sun Life Hong Kong Limited ("Sun Life") 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，倘若香港永明金融有限公司（「永明」）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 Sun Life. 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永明規定，否則，閣下的保單將會終止。詳情請參閱保單條款。
- If you intend to withdraw policy value in this policy in order to use it as premium payment of a new insurance policy, please approach to your licensed insurance intermediary who will assist you to understand the implications and associated risks involved as explained in "Important Facts Statement – Policy Replacement" ("IFS-PR"). You shall read through the details before making the change and return the signed IFS-PR together with the new application (if any) to us.
如閣下打算在本保單中提取保單價值以繳付新保單之保費，請聯絡閣下的持牌保險中介人，以助閣下了解「重要資料聲明書—轉保」("IFS-PR")內所述的影響和相關風險。在進行保單更改前，請閣下閱讀詳細內容，並簽署IFS-PR與新申請表（如有）一併遞交。
- Once the form is submitted to Sun Life, whether through Sun Life's 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 Sun Life.
此表格一經遞交給永明，不論是經由永明的理財顧問、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，而該新申請會在永明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 (in Policy Currency)**
戶口價值 (以保單貨幣)
- 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)

- Others (Please Specify) (in Policy Currency)**
其他 (請註明)
(以保單貨幣)
- Amount 金額
Or 或
 Withdraw All 全數提取

2021.03

Page 1 of 3



/WDU

(A) Transfer to Policy 轉至保單

Notes 備註：

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」。

Policy No. 保單號碼: as 作為

Loan repayment 償還貸款 Premium & Levy 保費及保費徵費

Others (please specify) 其他 (請註明)

(B) FPS or local money transfer 轉數快或本地轉賬付款

Notes 備註：

- (1) Bank account holder name must be same as Policy Owner's name 銀行賬戶持有人姓名必須與保單主權人姓名相同。
 (2) Please provide account holder's bank account proof which shows account holder name and account number 請提供帳戶持有人的銀行戶口證明，而該證明須列有銀行戶口持有人姓名及銀行賬號。
 (3) If the payout transaction via "FPS" or local money transfer is unsuccessful, the entire amount will be paid to the Policy Owner by cheque and mail to the Policy Owner's correspondence address. 如未能成功以「轉數快」形式或本地轉賬付款，整筆金額將以支票支付予保單主權人並寄至保單主權人之通訊地址。

FPS identifier 轉數快識別號碼: Email 電郵 (by FPS 轉數快):

Mobile number 手機號碼 (by FPS 轉數快): (Country Code 國家代號) (Telephone No 電話號碼)

Transfer to Policy's active autopay bank account 轉賬至保單之現行自動轉賬繳費賬戶

Transfer to the following account 轉賬至以下賬戶 (Please provide bank account proof 請必須提供銀行帳戶證明) :

Bank No 銀行編號	Branch No 分行編號	Bank Account Number 銀行賬戶號碼
<input type="text"/>	<input type="text"/>	<input type="text"/>

Payout currency
收取款項貨幣

- HKD 港元
- RMB 人民幣 (Only applicable for policies denominated in RMB 只適用人民幣貨幣的保單)

(C) Cheque 支票

Notes 備註：

- (1) When issuing a HKD cheque for foreign currency policies, Sun Life's daily exchange rate upon the cheque issuance will apply. 就外幣保單發出港元支票時，將以永明出票當日之兌換率計算。
 (2) For USD policy, a local USD cheque will be issued unless otherwise specified. 如無特別指示，美元保單將獲發本地結算之美元支票。

Cheque Currency 支票貨幣 HKD 港元 Policy Currency 保單貨幣

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 Client Service Centre 親臨客戶服務中心領取

Contact no. 聯絡電話:

If cheque will be collected 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)

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

I/We understand and consent that, any personal data collected by Sun Life Hong Kong Limited (Incorporated in Bermuda with limited liability) ("Sun Life") (whether collected in this form or otherwise) may be used by Sun Life for the following purposes: (i) processing and evaluating insurance applications and/or any other applications for financial services; (ii) administering and providing services in relation to insurance or financial products; (iii) processing, investigating and settling insurance claims and detecting and preventing fraud (whether or not relating to the policy issued by the Company); (iv) conducting customer surveys; (v) researching and designing financial, insurance or pensions products for clients' use; (vi) selecting and participating in reward, loyalty or privileges program and related service; (vii) contacting clients for the above purposes; (viii) purposes which are directly related to the above purposes; and (ix) complying with applicable laws, regulation or court order or obligation or requirement under an agreement, or other commitment, between Sun Life or any entity within the Sun Life Group and the regulator or government in any jurisdiction (in relation to money laundering, terrorist financing and tax evasion or otherwise) to which Sun Life and its related companies are subject to.

Sun Life may also use my/our contact details, demographic information and policy details to contact me/us with marketing information regarding Sun Life and third party pensions, financial and insurance products, including by phone calls, mail, email, SMS or any type of electronic message. Sun Life may not use my/our data for direct marketing unless Sun Life have received my/our consent (which includes an indication of no objection). I/We know I/we can tick the box below if I/we do not consent to receive direct marketing information.

Sun Life may disclose my/our personal data for any of the above purposes: (a) to third parties who provide services in Hong Kong or elsewhere which assist the Company to carry out the above purposes, including claims investigators, insurance adjusters, medical advisors, health care professionals, medical service providers, hospitals, emergency assistance service providers, reinsurers, accountants, solicitors and professional financial advisors; (b) to banks for payment purposes; (c) to insurance brokers who are representing the policy owners or clients directly or indirectly; (d) to the Company's insurance agents and MPF intermediaries; (e) to the Company's related companies (as defined in the Companies Ordinance) including pensions services provider, financial services companies and insurance companies; (f) to the Hong Kong Federation of Insurers (or any similar association of insurance companies) and its members; (g) to the policy owner / employers of an insured employee under a group product; (h) to any third party service provider appointed by the policy owner who provides administrative services for the policy owner; (i) to organisations that consolidate claims and underwriting information for the insurance industry; (j) to fraud prevention organisations; (k) to other insurance companies (whether directly or through fraud prevention organisations or other persons named in this paragraph), the police and databases or registers (and their operators) used by the insurance industry to analyse and check information provided against existing information; (l) to any person to whom the Company or its related companies (inside or outside Hong Kong) are under an obligation to make disclosure under the requirements of any law, regulation or court order binding on or applying to or to which the Company or its related companies (inside or outside Hong Kong) are subject to, or under and for the purposes of any guidelines issued by regulatory or other authorities with which the Company or its related companies (inside or outside Hong Kong) are expected to comply; and (m) as otherwise required or permitted by law.

If third party personal information is supplied to the Company by the clients, clients' service providers, claimants or applicants for services, such clients, service providers, claimants or applicants must inform these third parties about this personal information collection statement before they collect their information and supply it to the Company.

I/We understand that it is voluntary for me/us to supply the information, but failure to provide the requested personal data may mean Sun Life is unable to process my/our application or continue to provide services to me/us. I/We have the right to seek access to and request correction of any personal data Sun Life holds about me/us by sending a written request to The Manager, Client Service Centre, Sun Life Hong Kong Limited, G/F, Tower B, Cheung Kei Center, 18 Hung Lu Road, Hungghum, Kowloon, Hong Kong. Sun Life may charge a reasonable fee for the processing of any such requests.

"Sun Life Group" means Sun Life together with its subsidiaries, subsidiary undertakings and associated companies (whether direct or indirect) from time to time.

Please tick here to reject receiving marketing information from Sun Life.

本人 / 吾等明白及同意香港永明金融有限公司 (於百慕達註冊成立之有限責任公司) (「永明」) 可以將其所收集的任何個人資料 (不論由此表格所收集或由其他途徑取得) 作以下用途: (i) 處理及評估申請及/或任何其他金融服務申請; (ii) 管理並提供與保險及/或金融產品相關服務; (iii) 處理、調查和結清保險索償個案、以及偵測和防止欺詐行為 (無論是否與公司發出的保單有關); (iv) 進行客戶調查; (v) 為客戶研究及設計金融、保險或退休金產品; (vi) 甄選及參與獎賞、忠實或特選客戶計劃; (vii) 因上述目的與客戶聯絡; (viii) 與上述目的直接有關的任何其他目的; 及 (ix) 為遵守適用的法例、法規、法庭命令或永明或永明集團內的任何實體與任何管轄區域的監管機構或政府之間的協議項下的義務或要求或其他承諾 (其相關於洗黑錢、恐怖分子資金籌集、逃稅或其他)。

永明亦可使用本人/吾等的聯絡資料, 基本個人資料及保單資料, 就永明及第三方的退休金、金融及保險產品的推廣資訊, 以包括電話、郵件、電郵、電話短訊或任何電子信息等方法聯絡本人/吾等。除非得到本人/吾等之同意 (包括表示不反對), 否則永明不可使用本人/吾等之資料為該用途。本人/吾等明白若本人/吾等不同意接受此等推廣資訊, 可於下列方格內填上剔號。

永明可為以上任何目的披露本人/吾等的個人資料予: (a) 為協助公司就上述用途 (不論在香港或其他地方) 而提供服務的第三方, 包括索償調查員、保險理算人、醫療顧問、醫護專業人士、醫療服務提供者、醫院、緊急支援服務供應商、再保險公司、會計師、律師、專業理財顧問; (b) 銀行作繳款用途; (c) 直接或間接代表保單持有人或客戶的保險經紀; (d) 公司的保險代理人及強積金中介人; (e) 公司的關連公司 (根據公司條例訂明) 包括退休金服務提供者、金融服務機構及其他保險公司; (f) 香港保險業聯會 (或任何相似的保險公司協會) 及其會員; (g) 團體產品的保單持有人 / 受保僱員之僱主; (h) 由保單持有人指定及提供行政服務給保單持有人的第三方服務供應商; (i) 整合保險業索償和承保資料的組織; (j) 防欺詐組織; (k) 其他保險公司 (無論是直接地, 或是通過防欺詐組織或本段中指名的其他人士)、警察和保險業就現有資料而對所提供的資料作出分析和檢查的數據庫或登記冊 (及其運營者); (l) 公司及其關連公司 (不論在香港與否) 為遵守監管當局或其他機構發出之指引或其就法例、法規或法庭頒令所約束或規定之責任而需向其作出披露的任何人士; 及 (m) 按法例要求或准許的其他人士。

假如第三方個人資料是由客戶、客戶的服務供應商、索償人或申請人提供給公司, 該客戶、服務供應商、索償人或申請人必須在收集這些資料前, 將此《個人資料收集聲明》告知有關的第三方才把資料提供給公司。

本人/吾等明白本人/吾等提供個人資料均屬自願, 然而倘若未能提供所需個人資料, 可導致永明無法處理本人/吾等的申請或繼續提供服務予本人/吾等。本人/吾等有權查閱及要求更正永明持有有關本人/吾等的個人資料, 有關要求可以書面形式郵寄至香港九龍紅磡紅鸞道18號祥祺中心B座地下香港永明金融有限公司客戶服務中心經理。永明可就處理任何該等要求收取合理費用。

"永明集團"指永明及其不時之附屬公司、附屬企業和相聯公司 (無論是直接的還是間接的)。

若不同意收取由永明發出的推廣資訊, 請於方格內填上剔號。

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 understand and agree that should I select payout amount in a different currency other than the Policy Currency, I will bear the necessary exchange difference, such difference being determined by Sun Life on the basis of the internal exchange rates as at the time of the relevant currency conversion.

本人/我們明白並同意, 如果我選擇保單貨幣以外的其他貨幣付款金額, 我將承擔必要的匯兌差額, 該差額由永明根據當時的內部匯率確定相關貨幣換算。

Required Item 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

- True copy of HK Permanent Identity Card or Passport where the policyholder does not hold a HK permanent ID Card (if it has expired or not submitted before)
香港永久性居民身份證真確副本 / 如並非持有香港永久性居民身份證則必須提供護照真確副本 (若已過有效期或之前未曾提交)
- True copy of a passbook or monthly statement that bears the information of account number and name of account holder
載有銀行賬戶號碼及賬戶持有人姓名資料的存摺或月結單真確副本

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

Signature of Policy Owner

保單主權人簽署

Date (DD/MM/YYYY)

日期 (日 / 月 / 年)

Signature of Assignee (if any)

受讓人簽名 (如有)

Signature of Irrevocable Beneficiary (if any)

不可撤換受益人簽署 (如有)

Please return a full set of this form within 30 days of signing 請於簽署後30天內提交完整的表格