



HSBCSUR

Policy Number 保單號碼

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PICS 2020Jun

Request for Life Policy Surrender/Cancellation

人壽保單退保／取消申請表

Plan Type 計劃名稱	
Name of Policyholder in English (Surname first) 保單持有人英文姓名(姓氏先行)	
Identity Type & No. 證件類別及號碼	Identity Type 證件類別 <input type="checkbox"/> HKID 香港身份證 (I) <input type="checkbox"/> Passport 護照 (P) <input type="checkbox"/> Others 其他 (X) <input type="checkbox"/> Business Registration Certificate 商業登記 (B) Identity No. 證件號碼 _____ <input type="checkbox"/> Identity copy enclosed 附上證件副本
Request Type 申請項目	<input type="checkbox"/> Policy Surrender 保單退保 <input type="checkbox"/> Policy Cancellation within Cooling-off period* 於冷靜期*內取消保單 * Cooling-off period is 21 days after the delivery of the policy or issue of a notice informing the availability of the policy to you or your representative, whichever is earlier. 冷靜期是由交付該保單或由發出說明已可領取該保單之通知書予您或您的代表後21天內(以較早者為準)。

NOTE 注意：

- Please submit the identity copy for policy surrender/cancellation application. 申請保單退保／取消，請提交證件副本。**
- Please put a ✓ in the appropriate box(es) and complete in BLOCK LETTERS. 請在適當方格內加上✓號，並用正楷填寫。
- For WealthInvest Insurance Plan (WIIP)/WealthInvest Life Plan(WIPL), the surrender value of your policy will be subject to Early Encashment Charge in accordance with the respective policy terms. Early Encashment Charge applies during the first 9 policy years, up to 50% (WIIP)/23% (WIPL) of the Cash Value at the point of surrender. Please refer to the policy term for the relevant details. (適用於財富投資保險計劃／財富投資人壽計劃)根據相關保單條款，閣下保單的退保價值會受提早贖回費用影響。提早贖回費用適用於首九個保單年度，費用可高達退保時現金價值的50% (財富投資保險計劃)／23% (財富投資人壽計劃)。閣下可查閱保單條款以得到相關的詳細資料。
- For Goal Access Universal Life Plan (Protection) (ULPP)/Goal Access Universal Life Plan (Education) (ULEP), surrender charge applies during the first 10 policy years for ULPP and 8 policy years for ULEP. The maximum surrender charge is up to 45% (ULPP)/55% (ULEP) for regular premium policy and 11% (ULPP)/12% (ULEP) for single premium policy of the account value on the date we receive the request. Please refer to the policy terms for the relevant details. 退保費用分別適用於首十個保單年度(駁富保障萬用壽險計劃)／首八個保單年度(駁富教育萬用壽險計劃)，定期保費保單的退保費用最高達當收到要求時戶口價值的45% (駁富保障萬用壽險計劃)／55% (駁富教育萬用壽險計劃)及躉繳保費保單的退保費用最高達當收到要求時戶口價值的11% (駁富保障萬用壽險計劃)／12% (駁富教育萬用壽險計劃)。閣下可查閱保單條款以得到相關的詳細資料。
- If the payments are paid in currencies other than the policy currencies/currency of levy cap i.e. HKD as provided by the Insurance Authority, the payments would be subject to change according to the prevailing exchange rate of policy currencies/HKD to payment currencies to be determined by the Company from time to time. Likewise any payments settled in currencies other than the policy currencies/currency of levy cap i.e. HKD, the payments would be subject to the change according to the prevailing exchange rate of policy currencies/HKD to payment currencies to be determined by the Company from time to time. The fluctuation in exchange rates may have impact on the amount of payments including but not limited to premium payments, levy payments and benefit payments. By choosing the plans denominated in currencies other than local currency, you are subject to the exchange rate risks. Exchange rate fluctuates from time to time. You may suffer a loss of your benefit values and the subsequent premium payments and/or levy payments (if any) may be higher than your initial premium payment as a result of the exchange rate fluctuations. 如繳付款項貨幣有別於保單貨幣或保險業監管局訂定徵費上限的貨幣(即港幣)，該款項可能會受本公司不時釐定的保單貨幣／港幣對繳付款項貨幣的匯率而改變。同樣，如任何款項的貨幣不是以保單貨幣或保險業監管局訂定徵費上限的貨幣(即港幣)支付，該款項將會受本公司不時釐定的保單貨幣對支付貨幣／港幣的匯率而改變。匯率之波動會對款項構成影響，包括但不限於以繳付保費，保費徵費及利益支付款項。選擇非本地貨幣結算的保單，閣下須承受匯率風險。匯率會不時波動，閣下可能因匯率之波動而損失部分的利益價值及繳交往後保費及／或保費徵費(如有)可能會比繳交首次保費及保費徵費金額為高。
- To comply with the Foreign Account Tax Compliance Act (FATCA) regulations issued by the United States Department of the Treasury and Internal Revenue Service (IRS), we are required to establish the status of policyholder and connected person (including entities/companies) that is entitled to access the contract's value or change a beneficiary under the contract. If there is any update in information concerning these parties, you are required to provide the supporting documents. 為符合由美國財政部和國稅局(IRS)發出的海外賬戶稅務合規法案(FATCA)的規定，我們需要向保單持有人及關連人士(包括機構或公司)在保單上有權獲得保險合約的現金價值或更改受益人以作識別及分類。若該等人士有任何資料更新，閣下需按要求提供相關核實證明。
- For Jade Global series, Full Surrender is subject to a Surrender Charge and in some cases an Exit Value Adjustment. The proceeds received may be less than the premium paid. Please refer to Policy's terms and conditions for details. 適用於翡翠環球系列萬用壽險，完全退保須受制於退保費用及按個別情況進行退款價值調整，所收取的退保金額或會低於已支付的保費。詳情請檢閱保單條款及細則。

Section I – Reason for Policy Surrender/Cancellation 第一部分 – 退保／取消原因

Please indicate your reason(s) for surrender by putting a '✓' in the appropriate box(es):
請於下列適當空格內加✓說明退保原因(可作多項選擇)：

- 1. (LS) Insufficient after-sales service
售後服務未如理想
- 2. (RE) Returns below expectations
保單回報未如理想
- 3. (PH) High insurance premium
保費太昂貴
- 4. (OI) Funds used to purchase other investment products
資金已用作購買其他投資產品
- 5. (NC) Changes of my insurance needs (e.g. mortgage is paid off, needs of family financial protection have changed)
我的保險需求有所改變(例如：已還清樓宇按揭貸款、需要的家庭財務保障已更改)
- 6. (FO) Family Objection
家人反對
- 7. (FS) Change in financial situation[^]
經濟狀況改變[^]
- 8. (MS) Others (please specify below)
其他理由，請於下列說明：_____

[^] Apart from policy surrender, there may be other ways to gain liquidity (where applicable), such as withdrawing any accumulated annuities/dividends under your policy, applying for a policy loan, making partial surrender, or even lowering the sum insured of your policy. You should take note of the risks involved in each of these before making a decision. 除退保外，您亦可以選擇透過下列方式增加流動資金(如適用)：如提取保單內的累積年金／紅利、申請保單貸款、部分退保，或調低保障額。如考慮通過這些方式增加流動資金，將涉及風險，敬請注意。

NOTE 注意：

Life insurance involves a longer policy period. You could suffer financial loss or loss of insurance protection if you surrender an existing life insurance policy ("Policy Surrender") or replace your existing life insurance policy by another life insurance policy ("Replacement"), particularly during the early years of the policy period. To protect your interest, you should carefully consider and assess whether the Policy Surrender or Replacement is in your best interests before making a decision. You may also contact our staff to further understand the details of any actual and potential disadvantages of surrendering or replacing your existing life insurance policy(ies). 人壽保險涉及年期較長，如果投保人中途退保(「退保」)或以另外一份人壽保險保單取代現有的人壽保險保單(「轉保」)，您可能需要承受財務上的損失，亦可能導致保單上所列明的保障失效。特別是在保單生效後首數年，通常會蒙受損失。為保障本身的利益，閣下在決定退保或轉保前，應仔細考慮及衡量是否符合本身的最佳利益。閣下亦可與我們職員聯絡以進一步了解因退保或轉保引致的任何實質及潛在損失。

If you have replaced or intend to replace any or a substantial part of your existing life insurance policy(ies) with another life insurance policy in the past or the next 12 months, you are requested to complete an "Important Facts Statement – Policy Replacement" Form to understand any real and potential disadvantages of replacing your existing life insurance policy(ies). You could approach our staff for assistance with the form. 如閣下已經或打算用另一份於過去或未來12個月申請的人壽保單以取代您現有人壽保單的任何或重大部份，我們將建議閣下填寫一份《重要資料聲明書－轉保》以了解任何因取代現有保單可構成的實際或潛在不利因素。您可尋求我們職員的協助以填寫該份聲明書。

In respect of this surrender, do you intend to use some or all of the funds taken from the policy you are surrendering to pay for any life insurance policy(ies) you have purchased in the past 12 months? 就今次的退保而言，閣下是否打算將您退保之保單所得的部分或全部資金用於支付過去12個月內購買的任何人壽保單？

Yes 是 / Not yet decided 尚未決定

No 否

If your answer is "Yes" or "Not yet decided", you need to complete the "Important Facts Statement – Policy Replacement" Form to confirm your understanding of the factors to be considered and the risks involved in replacing your existing life insurance policy with a new life insurance policy. 如果閣下的回答是「是」或「尚未決定」，請填寫《重要資料聲明書－轉保》，以確認閣下了解以新的人壽保險保單取代現有人壽保險保單所需要考慮的因素及相關風險。

Section II – Policy Surrender/Cancellation (if applicable) 第二部分 – 保單退保／取消(如適用)
Payment Instruction – 發還退款指示

I/We understand and agree that the payment of the Cash Value will be made in accordance with policy terms and conditions and that HSBC Life (International) Limited shall be discharged of all liabilities upon such payment. 本人(等)同意及明白現金價值將按照保單條款發還，滙豐人壽保險(國際)有限公司一旦支付退款後，即獲免除其對上述保單之責任。

For WealthInvest Insurance Plan/WealthInvest Life Plan, 有關財富投資保險計劃／財富投資人壽計劃，

(1) policy charges relating to a full policy month will be deducted from the amount that is paid out.

整月的保單費用將於支付有關款項時先行扣除。

(2) surrender will be subject to Early Encashment Charge# (if applicable).

退保時將收取提早贖回費用# (如適用)。

Early Encashment Charge (EEC) = EEC rate x Account Value at point of surrender 提早贖回費用 = 提早贖回費用率 x 退保時的戶口價值

EEC rates are set out in the table below 提早贖回費用率列於下表：

For WealthInvest Insurance Plan 有關財富投資保險計劃

During Policy Year 保單年度內	EEC Rate 提早贖回費用率	During Policy Year 保單年度內	EEC Rate 提早贖回費用率
1	50%	6	12%
2	30%	7	10%
3	21%	8	8%
4	17%	9	6%
5	14%	10 and thereafter 及以後	0%

For WealthInvest Life Plan 有關財富投資人壽計劃

Standard Coverage Option 標準計劃			
During Policy Year 保單年度內	EEC Rate 提早贖回費用率	During Policy Year 保單年度內	EEC Rate 提早贖回費用率
1	23%	6	12%
2	21%	7	10%
3	19%	8	8%
4	17%	9	6%
5	14%	10 and thereafter 及以後	0%

Capital Coverage Option 資本計劃			
During Policy Year 保單年度內	EEC Rate 提早贖回費用率	During Policy Year 保單年度內	EEC Rate 提早贖回費用率
1	16%	6	8%
2	14%	7	7%
3	13%	8	5%
4	12%	9	4%
5	10%	10 and thereafter 及以後	0%

Section II – Policy Surrender/Cancellation (if applicable) (cont'd) 第二部分 – 保單退保／取消(如適用)(續)
Payment Instruction – 發還退款指示

If “Standing Instruction” has been set up for premium payment arrangement, please be reminded that you should complete and return the “Standing Instruction Request form” to The Hongkong and Shanghai Banking Corporation Limited for the cancellation of the said arrangement. Normally, it takes 5 business days to process such request. 若上述保單已設立「常行指示」以繳付保費，請注意，閣下需填妥並交回「常行指示申請表」予香港上海滙豐銀行有限公司，以取消有關常行指示的安排。有關安排，一般需時5個工作天方可生效。

To change address, please tick and give details. 如需更改地址，請✓及填上資料。

PAYMENT made payable to Policyholder 保單持有人
 收款人為保單持有人／承讓人 Assignee 承讓人

Payment Currency 收款貨幣
 Policy currency 保單貨幣
 HKD for USD/GBP/CNY policies 港幣付款(適用於美金／英鎊／人民幣保單)

By Bank Account 經銀行戶口
 Transfer to the policyholder’s premium deduction account 轉賬至保單持有人之保費轉帳戶口
 Transfer to the policyholder’s any other bank account^ 轉賬至保單持有人之任何其他銀行戶口^

Bank Name and Branch 銀行及分行之名稱	Bank No. 銀行編號	Branch No. 分行編號	Account No. 賬戶號碼

(Applicable to payment in CNY/GBP/HKD/USD 適用於人民幣／英鎊／港幣／美金之轉帳)

Transfer to the Assignee’s bank account^ 轉賬至承讓人之戶口^

Bank Name and Branch 銀行及分行之名稱	Bank No. 銀行編號	Branch No. 分行編號	Account No. 賬戶號碼

(Applicable to payment in CNY/GBP/HKD/USD 適用於人民幣／英鎊／港幣／美金之轉帳)

By cheque 以支票形式
 Please mail the cheque to 請把支票寄往
 Policyholder’s correspondence address 保單持有人之通訊地址
 Assignee’s correspondence address 承讓人之通訊地址

Notes 註：

^ If no identity verification has been performed by Bank staff for this request, please also submit adequate proof showing the policyholder/assignee’s full name and the bank account number (such as copy of bank book, ATM card, bank statement etc) to the company. If we do not receive the copy of the required document(s), the payment will be made by cheque payable to the policyholder/assignee and mailed to the policyholder/assignee’s correspondence address. 如此申請並沒經由銀行職員作出身份核實，請同時提交印有保單持有人／承讓人全名及銀行戶口號碼之充足證明(如銀行存摺或自動櫃員機卡或月結單副本等)。若閣下沒有提供上述所需文件，退款將以支票形式寄予保單持有人／承讓人之通訊地址。

Data Privacy Notice

Notice relating to the Personal Data (Privacy) Ordinance

We protect your privacy. Read this notice to find out how we collect, store, use and share your personal data.

1

HOW WE COLLECT AND STORE YOUR DATA

We collect your data

- when you interact with us, apply for and use our products and services
- visit our websites (please see the “Privacy and Security” section of www.hsbc.com.hk and refer to “Use of cookies policy” for details of how we use cookies)
- from other people and companies, including other HSBC group companies

We may store your data locally or overseas, including in the cloud. We apply our global data standards and policies wherever your data is stored.

We’re responsible for keeping your data safe in compliance with Hong Kong law.

2

WHAT WE USE YOUR DATA FOR

We use your data

- to send you direct marketing if you’ve consented to it
- to consider applications for, offer, provide and manage products and services
For example: (i) insurance, annuities, pensions and health and wellness products and services; (ii) educational materials; (iii) products and services relating to campaigns and promotions which you have signed up to
- to design and improve our products, services and marketing
- to help us and other HSBC group companies comply with laws, regulations and requirements, including our internal policies, in or outside Hong Kong
- to detect, investigate and prevent financial crimes
- for the other purposes set out in section B

3

WHO WE SHARE YOUR DATA WITH

We share your data with

- other HSBC group companies
- third parties who help us to provide services to you or who act for us
- third parties who you consent to us sharing your data with
- local or overseas law enforcement agencies, industry bodies, regulators or authorities
- the other third parties set out in section C

We may share your data locally or overseas.

You can access your data

You can request access to the data we store about you. We may charge a fee for this.

You can also ask us to

- correct or update your data
- explain our data policies and practices

You control your marketing preferences

You control whether you receive marketing from us.

You can change this at any time by contacting us.

You can contact us

dfv.enquiry@hsbc.com.hk
The Data Protection Officer
HSBC, PO Box 72677,
Kowloon Central Post Office,
Hong Kong

A
Collect and store

We may collect

- biometric, medical and health/lifestyle data such as your heart rate, BMI and steps count
- your geographic data and location data based on your mobile or other electronic device
- data from people who act for you or who you deal with through our services
- data from public sources, aggregators and other sources available to us
- data from policyholders or members of our insurance policies of which you benefit from or are insured by

If you don't give us data then we may be unable to provide products or services.

We may also generate data about you

- by combining information that we and other HSBC group companies have collected about you
- based on the analysis of your interactions with us and information which we have collected about you
- through the use of cookies and similar technology when you access our website or apps

B
Use

We use your data to

- handle and take care of claims
- help us to comply with requirements or requests that we or the HSBC group have or receive such as legal or regulatory in or outside Hong Kong. Sometimes we may have to comply and other times we may choose to voluntarily comply
- conduct identity, medical or credit checks
- create and maintain the credit and risk related models of the HSBC group (such as underwriting models, health and wellness models and models/algorithms for data analytics and artificial intelligence)
- manage our business, including exercising our legal rights
- determine, pay or collect money owed to you or to us
- match data held by HSBC group companies for purposes listed in this notice
- provide personalised advertising to you on third party websites (this may involve us aggregating your data with data of others)
- other uses relating to the above or to which you have consented

If you provide data about others

If you provide data to us about another person, you should tell that person how we will collect, use and share their data as explained in this notice.

C
Share

We share your data with

- local or overseas bodies or authorities such as legal, regulatory, law enforcement, government and tax and any partnerships between law enforcement and the financial sector
- any person who is a party to a transaction (or a potential transaction) buying interest or assuming risk in an insurance policy, such as reinsurers
- payment recipients, beneficiaries or any person who act for our customer or you, or anyone whose data is provided for receiving benefits under an insurance policy or otherwise
- hospitals, clinics, medical practitioners, laboratories, technicians, loss adjustors, risk intelligence providers, legal advisers or private investigators who act for us
- any third party who we may transfer our business, policies or assets to so it can evaluate our business and use your data after any transfer
- partners and providers of reward, co-branding or loyalty programs, charities or non-profit organisations
- social media advertising partners (who can check if you have or use our products and services and send our adverts to you and advertise to people who have a similar profile to you)

We may share your anonymised data with other parties not listed above. If we do this you won't be identifiable from this data.

D
Direct Marketing

This is when we use your data to send you details about financial, insurance, pensions, annuities or related products, services and offers (such as health and wellness) and promotional campaigns provided or hosted by us or our co-branding, rewards or loyalty programme partners, charities or other third party financial institutions and service providers.

We may use data such as your demographics, the products and services that you're interested in, transaction behaviour, portfolio information, location data, social media data, analytics, health and wellness data and information from third parties when we market to you.

We don't give your data to others for them to market their products and services to you. If we ever wanted to do this, we'd get your separate consent.

This notice will apply for as long as we store your data. We'll send you the latest version at least once a year. If we use your data for a new purpose, we'll get your consent.

Note: In case of any discrepancies between the English and Chinese versions, the English version shall apply and prevail.

資料私隱通知

關於個人資料(私隱)條例的通知

我們致力保護您的私隱。請閱讀此通知，了解我們如何收集、儲存、使用及披露您的個人資料。

1

我們如何收集及儲存您的資料

我們收集您資料的途徑包括

- 您與我們互動，向我們申請及使用我們的產品和服務
- 您瀏覽我們網站(有關我們如何使用「cookies」的詳情，請參閱我們網站www.hsbc.com.hk進入「私隱與保安」閱覽「Use of cookies 政策」)
- 其他人士及公司(包括其他滙豐集團旗下公司)

我們可能將您的資料儲存於本地或海外，包括雲端。無論您的資料儲存於何處，均受我們的環球資料標準及政策約束。

我們有責任根據香港法律保護您的資料安全。

2

我們如何使用您的資料

我們將您的資料用於

- 經您同意後向您發送直接促銷資料
- 考慮申請、為您推薦、提供及管理產品與服務
例如：(i)保險、年金、退休金、健康與保健產品及服務；(ii)教育材料；(iii)關於您已報名參與之活動及推廣的產品與服務
- 設計及改進我們的產品、服務及市場推廣活動
- 幫助我們及其他滙豐集團旗下公司遵守香港或其以外的國家或地區的法律、法規和要求，包括我們的內部政策
- 偵測、調查及預防金融罪案
- B部分所列的其他目的

3

我們與誰披露您的資料

我們與下列人士披露您的資料

- 其他滙豐集團旗下公司
- 幫助我們向您提供服務或代表我們行事的第三方
- 您同意我們與之披露您資料的第三方
- 本地或海外執法機構、行業組織、監管機構或權力機關
- C部分所列的其他第三方

我們可能在本地或海外披露您的資料。

您可查閱自己的資料

您可要求查閱我們所儲存有關您的資料。我們可能就此向您收取費用。

您可要求我們

- 改正或更新您的資料
- 說明我們的資料政策及慣例

您可控制自己的市場推廣偏好

您可控制您會否從我們收取市場推廣資料。

您可隨時聯絡我們對此作出更改。

您可聯絡我們

dfv.enquiry@hsbc.com.hk

資料保護主任

香港上海滙豐銀行有限公司

香港九龍中央郵政局

郵政信箱72677號

A 收集及儲存

我們或會

- 收集生物辨識、醫療及健康／生活模式資料，例如您的心跳率、身高體重指數及步數統計
- 基於您的流動或其他電子裝置收集您的地域及位置資料
- 從代表您的人士或您透過我們服務與之往來的人士收集資料
- 從公開渠道、資料整合機構及其他我們接觸得到的渠道收集資料
- 從您受益或受保於我們的保險下的保單持有人或保單成員收集資料若您不向我們提供資料，我們可能無法提供產品或服務。

我們亦可能透過以下途徑衍生有關您的資料

- 整合我們及其他滙豐集團旗下公司收集的有關您的資料
- 分析您與我們的互動及我們已收集得來有關您的資料
- 於您瀏覽我們網站或應用程式時使用cookies或類似技術

B 使用

我們將您的資料用於

- 處理及安排索償
- 幫助我們遵守包括香港或其以外的地區或國家的法律或監管機構對我們或滙豐集團現有或所收到的相關監管規定或要求。這些監管規定或要求可能是我們必須遵從或選擇自願遵從的
- 進行身份審查、身體檢查或信用審查
- 設立及維持滙豐集團的信貸及風險相關準則(例如承保準則、健康及保健準則，以及用於資料分析及人工智能的準則／算法)
- 管理我們業務，包括行使我們的法律權利
- 釐定、支付或收取欠您或欠我們的款項
- 與滙豐集團旗下公司所持有的資料核對，以供作本通知所列明的用途
- 於第三方網站上為您提供個人化廣告(這可能涉及我們將您與他人的資料進行整合)
- 與上述用途相關或經您同意的其他用途

若您提供他人的資料

若您向我們提供有關其他人士的資料，您應按本通知所述，告知該人士我們將如何收集、使用和披露其資料。

C 披露

我們與下列人士披露您的資料

- 本地或海外的法律、監管、執法、政府和稅務等機構或權力機關，以及執法機構與金融業界之間的任何合作夥伴
- 交易(或潛在交易)下收購保單權益或承擔保單風險的一方，例如再承保人
- 收款人、受益人或任何為我們的客戶或您行事的人；或任何為收取保單賠償或為其他目的而資料被提供的人
- 代表或為我們提供服務的醫院、診所、醫生、化驗所、技術員、理賠員、風險情報提供機構、法律顧問或私家偵探
- 我們可能轉讓業務、保單或資產的任何第三方，以便其評估我們的業務及在轉讓後使用您的資料
- 獎賞、合作品牌或忠誠計劃的合作夥伴及供應商，以及慈善或非牟利機構
- 社交媒體廣告合作夥伴(可查看您是否擁有或使用我們的產品及服務，並向您及與您個人資料相似的人士發送我們的廣告)

我們可能與上文並未列出的其他人士披露您的匿名資料。在此情況下，有關資料將無法識別出您的身分。

D 直接促銷

指我們使用您的資料向您發送由我們或我們的合作品牌、獎賞或忠誠計劃合作夥伴、慈善機構或其他第三方金融機構及服務供應商所提供或舉辦的金融、保險、退休金、年金或相關產品、服務和優惠詳情(例如健康與保健)及推廣活動的詳細資料。

向您進行市場推廣時，我們或會使用您的資料，例如人口統計資料、您感興趣的產品及服務、交易行為、投資組合資料、位置資料、社交媒體資料、分析、健康及保健資料和來自第三方的資料。

我們不會向他人提供您的資料，以供其向您推廣產品及服務。如有此意，我們會另行徵求您的同意。

本通知於我們儲存您的資料期間適用。我們亦會每年向您提供此通知的最新版本。若我們將您的資料用於新用途，則會徵求您的同意。

注意：中英文本如有任何歧義，概以英文本為準。

Declaration 聲明

I/We understand that I am/we are advised to read the policy terms and the content of this form (including the Notes) carefully before making this policy surrender/cancellation request. 本人(等)明白在申請此保單退保/取消前,本人(等)獲建議詳細閱讀保單條款及在本表格的內容(包括注意事項)。

I/We, the Policyholder(s), warrant to the Company that no proceedings in bankruptcy or insolvency have been instituted or are pending against me/us. 本人(等)(即保單持有人)向貴公司保證,本人(等)並無被起訴破產或無力償債,或身為尚待結案的破產或無力償債訴訟的與訟人。

By signing below, I/we confirm the above application and agree that the Company may use and disclose all personal data about me/us that the Company currently or subsequently hold for the purposes as set out in the Notice relating to the Personal Data (Privacy) Ordinance which accompanies this form. 本人(等)在下方簽署即確認上述申請並同意貴公司可按本表格隨附的關於個人資料(私隱)條例的通知內列出的用途使用及披露貴公司現時或其後持有有關本人(等)的全部個人資料。

Signature of Policyholder
保單持有人簽署

Signature of Joint
Life Insured (if any)
聯名受保人簽署(如適用)

Signature of Irrevocable
Beneficiary (if any)
不可撤換受益人簽署(如適用)

Signature of Assignee
(with company chop, if any)
承讓人簽署(如適用,請蓋上公司印章)

Name 姓名: _____

Name 姓名: _____

Name 姓名: _____

Name 姓名: _____

Date 日期: _____

Date 日期: _____

Date 日期: _____

Date 日期: _____

Importance Note: Please return the original of this form, duly completed and signed, to HSBC Life (International) Limited of 18/F, Tower 1, HSBC Centre, 1 Sham Mong Road, Kowloon, Hong Kong. Please note that we will only process your request upon actual receipt of this "original form."

重要事項:請填妥及簽署此申請表(表格)"正本"後並寄回滙豐人壽保險(國際)有限公司,地址:香港九龍深旺道一號滙豐中心一座十八樓,當收到此申請表(表格)"正本",我們方會辦理閣下之申請。

For Bank Use Only

Retention Result:

Replaced by other policy
(New HSBC Insurance policy no. _____)

- Client's identity copy attached
 Client's original identity sighted
(Initial of Staff: _____)
 Client's SI cancellation form attached
 Copy of Client's other bank account information checked
(only applicable if customer choose to pay to non premium deduction account)

Branch Chop

Staff Name

Staff ID no.

Contact no.:

Servicing Staff IA no.

Servicing Staff RI no.

Branch no.

For CMB only

CIN No. (in 11 digits) _____ Policyholder RR S H M L N/A

For Forced Surrender case:

- Surrender by LMU (Loan Management Unit)
 Initiated by customer

Customer Health Status:

Check with the customer's health status

- Yes, checked
 No, reason: _____
 Others, please specify: _____

Notification to LMU

Notice LMU for the health status of the customer

- Yes, noticed
 No, will notice on _____
 Others, please specify: _____