Fund Switching & Change of Contributions Allocation Schedule / Investment Mandate
基金轉換及更改供款分配指示／投資委託書

Sun Life 永明金融

Policy Number 保單號碼	Name of Policy Owner 保單主權人姓名

一個登入，
輕鬆掌握您的保障及強積金資訊
One login. Stay connected to your insurance and MPF information in one place.

幾步即可完成 All in just a few simple steps
- 查看保險保單及強積金戶口概覽 View your insurance policy and MPF account summary
- 提取保險保單價值及提交保單索償申請 Withdraw insurance policy values and submit policy claims
- 使用「積金導航」獲取強積金「參考投資組合」 Get MPF Reference Portfolio from MPF Navigator
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My Sunlife Hong Kong

To ensure you can enjoy our high quality of service, we would like to invite you to update your contact details on My Sunlife Hong Kong Client Platform 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 Sunlife Hong Kong客戶平台或填寫以下部份更新您的聯絡資料:

Email 電郵地址	Mobile 手提 ( )

You may return the completed form to Client Services Delivery of Sun Life Hong Kong Limited ("Sun Life") by fax to (852) 2103 8882. If you have submitted by fax, please DO NOT submit the original form.
閣下可以選擇將完成表格傳真至（**852**）**2103 8882** 香港永明金融有限公司（「永明」）之客戶服務部收。已傳真的表格，請勿提交正本。

Important Notes 重要事項

1. 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。
2. Subject to the provisions stated in the policy, the completed and signed forms must be received by Policy Administration Services Department of Sun Life by 4:00 p.m. on a business day (except Saturdays, Sundays and public holidays) to ensure the fund switch instruction to take place on the following valuation day. Please note that there may be deferral in processing of the instruction(s) subject to any dealing restrictions as stated in the offering document(s) of the underlying fund(s).
   在符合保單合約內之條款訂明，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）下午四時正前遞交到永明之保單行政服務部，以確保於下一個估值日進行有關基金轉換的指示。請注意，交易指示或會因相關基金之銷售文件上列明的任何交易限制所限而被延遲處理。
3. Sun Life shall not be liable for any loss or damages, whatsoever or howsoever arising from delay (if any) in processing your instruction in any of the circumstances including but not limited to the below:
   a) Any incomplete or unclear instruction resulting that Sun Life cannot process your instruction in full, Sun Life will not process any portion of the instruction.
   b) If more than one instruction is received in respect of the same/ different transactions for the same policy on any single day, Sun Life has the sole discretion to determine the priority in dealing with such instructions or to defer such instruction.
   c) 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, Sun Life has the sole discretion to determine the priority in dealing with such instructions or to defer such instructions
   d) Any instruction of investment choice(s) with a higher risk profile than your investment risk profile
   e) Not processing any instruction without relevant knowledge and experience of derivative products of your own.
   永明毋須對因任何方式導致的延遲(如有)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：
   甲. 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，永明不會處理此表格的任何部份。
   乙. 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，永明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。
   丙. 永明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，永明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。
   丁. 任何指示內投資選項風險類型高於閣下的投資風險類型。
   戊. 因閣下沒有擁有相關的衍生工具產品的知識及經驗而無法處理的任何指示。
4. Investment involves risk. If at any point of time you are in doubt whether your investment option(s) 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。
5. Once the form is submitted to Sun Life, whether through Sun Life's advisor 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。
6. If you want to collect dividend from Investment-Linked Fund (Dist) (if applicable) by means other than cheque, please provide the instruction by submitting "Policy Value Payout Method" form which is available on SunLife's website www.sunlife.com.hk and My Sunlife Hong Kong Client Platform.
   如您想通過支票以外的方式從投資相連基金(派發)（如果適用）中收取股息，請完成並交回「保單價值收款方法」表格。該表格載於本公司網站 www.sunlife.com.hk 和 My Sunlife Hong Kong客戶平台。
7. Any payout amount will be paid to the Policy Owner as default on payout date determined by Sun Life. If ownership is transferred to a new Policy Owner on payout date, the payout amount will be paid to the new Policy Owner.
   在永明確定的支付日期，所有支付金額將支付給保單主權人。倘若保單主權人在支付日將其保單之擁有權轉移至新的保單主權人，所派發之支付金額將派發予新的保單主權人。
8. If you want to change investment option(s) for existing holdings, please complete Part 1.
   如您想更改現在持有的基金，請填寫第1部分。
9. If you want to change investment option(s) for future contribution, please complete Part 2. If you do not complete Part 2, future contributions / regular investment will continue to be allocated in the investment option(s) you have already chosen.
   如您想更改將來的投資選擇，請填寫第2部分。如您未有填寫第2部分，日後的供款 / 定期投資將繼續沿用您已選取的投資選擇。
10. Please refer to Sun Life's website www.sunlife.com.hk for more details on your investment option(s).
    有關投資選擇的詳情，請瀏覽永明的網頁www.sunlife.com.hk 。

Sun Life Hong Kong Limited (Incorporated in Bermuda with limited liability) G/F, MU Tower B, No. 18 Hung Luen Road, Hunghom, Kowloon, Hong Kong
Tel (852) 2103 8928 Fax (852) 2103 8938 A member of the Sun Life group of companies
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) 香港九龍紅磡鴻道 18 號都大中心 B 座地下
電話 (852) 2103 8928 傳真 (852) 2103 8938 永明金融集團成員之一

1 Fund Switching 基金轉換

Notes 備註：
1. Please fill in the percentage (%) of the fund in whole number and the total percentage (%) must equal to 100%. 請以整數填寫基金百份率並必需合共為100%。
2. The suspended funds cannot be switched. 暫停交易的基金不可轉換。
3. Switch in and switch out cannot be processed on the same fund at the same time. 不可同時賣出及買入同一基金。
4. The fund code^ is available at Sun Life's website (www.sunlife.com.hk). 基金編號^可於永明的網頁(www.sunlife.com.hk)內查詢。

Switch Out 轉換出

☐ ALL of my existing holdings 我現在持有的全部基金

☐ The selections below以下選擇的基金

Fund Code 基金編號^	Percentage (%) /Amount 百分率(%)／金額

Switch in 轉換入 Fund Code 基金編號^	(Minimum 最少 5%)	Percentage (%) 百分率(%)

2 Change of Contributions Allocation Schedule / Investment Mandate 更改供款分配指示／投資委託書

Notes 備註：
1. Please fill in the percentage (%) of the fund in whole number and the total percentage (%) must equal to 100%. 請以整數填寫基金百份率並必需合共為100%。
2. For "SunWish" / "SunFortune" policy, bonus (if any) will be distributed according to the latest contribution allocation schedule / investment mandate. 於「迎雋投資壽險計劃」/「迎悅投資壽險計劃」的保單，獎賞(如有)將按最新的供款分配指示／投資委託書發放。
3. The fund code^ is available at Sun Life's website (www.sunlife.com.hk). 基金編號可於永明的網頁(www.sunlife.com.hk)內查詢。

Fund Allocation 基金分配 Fund Code 基金編號^	(Minimum 最少 5%)	Percentage (%) /Amount 百分率(%)／金額

Total 合共 100%

3 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 servic, 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, MU Tower B, No. 18 Hung Luen Road, Hunghom, 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.
es; (ii) administering and providing services in relation to insurance or financial products; (iii) processing

☐ 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號都大中心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。

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 confirm that I/We have evaluated the level of risk of the underlying fund/investment myself/ourselves and have selected the investment option(s) for the purposes of the policy based on my/our own judgement and personal needs.
本人／我們已評估各相關基金／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。
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 Signature 簽署

<<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)

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