Policy Value Payout Method
保單價值收款方法

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 ( )

i 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. Please complete this form for changing method to receive payment for any policy value payouts.
   請填寫此表格以更改保單價值收款的方式。
3. The Faster Payment System (FPS) account and bank account for local money transfer must be registered under the Policy Owner of exact name match.
   「轉數快」快速支付系統（「轉數快」）註冊帳戶及用作本地轉賬的銀行賬戶持有人必須為保單主權人，而名稱排列必須完全一樣。
4. 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。
5. Please note Renminbi (RMB) payout is only available to Policy in RMB policy currency. If your policy is not denominated in RMB, we can only pay you "HKD" or "Policy Currency" option according to the payout method.
   請注意人民幣選項只適用於以人民幣為保單貨幣的保單。如果您的保單不是人民幣計價的，我們只能根據支付方式向您支付「港元」或「保單貨幣」。
6. Change of mobile contact and email address with Sun Life Hong Kong Limited ("Sun Life") do not automatically change the FPS registered mobile number or FPS registered email. Please inform SLHK as soon as possible of any change or cancellation of the FPS registered account.
   於香港永明金融有限公司（「永明金融」）更改手機聯繫方式和電子郵件地址並不會自動更改轉數快註冊手機號碼或轉數快註冊電郵。如果轉數快註冊帳戶發生任何更改或取消，請盡快通知永明金融。
7. Sun Life reserves the right to ask for other supporting documents if deemed necessary.
   如有需要，永明金融保留要求遞交其他証明文件之權利。

1 Policy Value Payout Method 保單價值收款方式

Please "✓" only one payout method請「✓」一個收款方式

1. By FPS or local money transfer 轉數快或本地轉賬付款

Receive payouts in the following currency 用以下貨幣收取款項: ☐ **HKD** 港元 ☐ **RMB** 人民幣

☐ **a) FPS identifier** 「轉數快」識別號碼:

☐ **b) Email** 電郵 **(by FPS** 轉數快**):**

☐ **c) Mobile number** 手機號碼 **(by FPS** 轉數快**):**

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

☐ **e) 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								

2. By Cheque 支票

Cheque currency in 支票貨幣: ☐ **HKD** 港元 ☐ **Policy Currency** 保單貨幣

Collection method 收取方式: ☐ **Via Consultant** 經顧問轉交 ☐ **Mail to Policy Owner's correspondence address** 直接郵寄至保單主權人通訊地址

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) 香港九龍紅磡紅鸞道 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

2 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, 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.

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

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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。

3 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，該差額由永明金融根據當時的內部匯率確定相關貨幣換算。

4 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

☐ 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副本 / 如並非持有香港永久性居民身份證則必須提供護照副本（若已過有效期或之前未曾提交）

☐ Copy of a passbook or monthly statement that bears the information of account number and name of account holder (1e)
載有有銀行賬戶號碼及賬戶持有人姓名資料的存摺或月結單副本（若選擇為 1e）

<<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