Request for Policy Change
保單更改申請

Policy No. **保單編號**	
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
- 獲取專屬禮遇及訂閱《Sun活情報》 Enjoy exclusive privileges and subscribe to SunNews

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Request is hereby made to the Company to change the below item(s) regarding the above policy:
With effect from 1 January 2018, levy collected by the Insurance Authority has been imposed on relevant policy at the applicable rate. For further information, please visit our company website (www.sunlife.com.hk) or contact our Client Service Hotline (852) 2103 8928.
保單主權人茲向公司申請更改上述保單之資料：
由2018年1月1日起，保險業監管局收取本保單的保費徵費已按照適用的徵費率徵收。更多有關保費徵費資料，請瀏覽本公司網頁(www.sunlife.com.hk)或致電客戶服務熱線(852) 2103 8928。

According to the "Guideline on Anti-Money Laundering and Counter-Terrorist Financing" issued by the Insurance Authority, we have to ensure the client's information we retained is up-to-date. We encourage you to update us of any change in your name, nationality, occupation, nature of business, residential address or source of fund timely. You may complete relevant forms which can be downloaded from our website (www.sunlife.com.hk). Please feel free to contact your consultant or our Client Services if you have any inquiries or need any assistance.
根據保險業監管局發出的「打擊洗錢及恐怖分子資金籌集指引」，我們需確保客戶提供予我們的紀錄仍然正確。所以我們鼓勵您不時更新您所提供的資料包括姓名、國家、職業、業務性質、居住地址或資金來源。您可以於本公司網頁(www.sunlife.com.hk)下載有關表格。如有任何疑問或需要協助，歡迎致電客戶服務部或聯絡您的顧問。

When the payment amount is HKD2,000,000.00 (or its equivalent) or more, identity verification for non-corporate entity owner may required to safeguard your interest. SMS will be sent to the registered mobile phone number of policy owner to proceed with the verification. If the identity verification cannot be completed within the required timeframe, Sun Life may not able to process your request.
如付款金額為港幣2,000,000.00元(或其等值)或以上，我們將可能會核實非法團實體保單主權人身份以保障您的利益。保單主權人的登記手提電話號碼將會收到短訊以進行認證。倘若身份認證未能在指定時間完成，永明金融或未能處理您的申請。

Please "✓" the option for the applicable changes. **請「✓」需要更改之選項。**

1. Dividend Option 紅利運用方式

- ☐ Accumulation with Interest
  積存生息
- ☐ Cash Withdrawal
  提取現金
- ☐ Paid-up Additions (For Standard policy only)*
  紅利繳清壽險(只適用於標準保費級別保單)*
- ☐ Premium Reduction / Payment (The payment mode and method will be defaulted as "Annual" and "Direct Billing" after the change is in effect)
  繳付到期保費（當更改生效後，付款形式及繳費辦法會設定為年繳及通知繳付）

* Please submit the 'Request for Policy Change (with Personal Certificate of Insurability)' Form together.
請同時遞交「保單更改申請(附可保證明書)」申請表。

2. Coupon Option 花紅運用方式

- ☐ Accumulation with Interest
  積存生息
- ☐ Cash
  現金

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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

3. Premium Offset / Self Financing 紅利繳交保費 / 紅利對減保費

1. The dividend and coupon balance must be enough to cover the coming 2 years of premium.
積存之紅利及花紅須足夠繳付未來兩年保費。

2. The dividend and coupon option will be defaulted as "Accumulation with interest" and the premium will be paid annually after the change is in effect.
當更改生效後，紅利及花紅運用方式將自動更改為「積存生息」及付款形式為年繳。

☐ To apply for Premium Offset / Self Financing
申請紅利繳交保費 / 紅利對減保費

☐ To withdraw from Premium Offset / Self Financing (only applicable if policy paid by Premium Offset/ Self Financing for 2 years of premium)
取消紅利繳交保費 / 紅利對減保費（只適用於已透過紅利繳交保費 / 紅利對減保費繳付兩年保費的保單）的保單

4. Premium Deposit Fund (PDF) 保費儲蓄基金

1. This request should be submitted within 1 month before policy anniversary date and the deposit should be enough to cover coming 2 years of premium.
此申請須在保單周年日前1個月內提出，而該存款須最少可繳付未來兩年保費。

2. The payment mode will be defaulted as "Annual" after the change is in effect.
當更改生效後，付款形式會設定為年繳。

3. The premium due will deducted on the Premium Due Date.
保費會在保費到期日扣取。

4. Interest rate of PDF is not guaranteed and subject to change without prior notice.
保費儲蓄基金的利率並非保証，如有更改，公司不會另行通知。

5. Partial withdrawal of PDF is not accepted and withdrawal is subject to surcharge.
保費儲蓄基金不可作部分提取，而公司將就提取款項收取額外費用。

6. Policy Owner is subject to pay levy for prepaid amount.
保單持有人需要就此預繳繳付徵費。

Number of pre-paid years
預繳年期 _____

Please contact your licensed insurance intermediary or our Client Service Hotline (852) 2103 8928 to obtain the total amount payable.
如欲查詢應繳總額，請聯絡閣下之持牌保險中介人或客戶服務熱線 (852) 2103 8928。

5. Change of Payment Mode & Method 更改付款形式及繳費辦法

Please select option under both 'Payment Mode' and 'Payment Method'.
請同時選擇「付款形式」及「繳費辦法」

Payment Mode 付款形式

☐ Annual
每年

☐ Semi-Annual (For Traditional policy only)
半年繳（**只限傳統壽險保單**）

☐ Monthly (by Autopay only*)
每月（**只能以自動轉賬繳費***）

Payment Method 繳費辦法

☐ Direct Billing
通知繳付

☐ Autopay by Bank Account*
銀行自動轉賬*

☐ Autopay by Sun Life Credit Card*
永明金融信用咭自動轉賬*

* For monthly payment mode settle via autopay, please submit the required 'Direct Debit Authorization' or 'Direct Debit Authorization Agreement For Sun Life Financial Credit Card' form.
以每月形式繳費請遞交所需「直接付款授權書」或「永明金融信用卡直接付款授權書」

6. Change of Non-Forfeiture Option 更改不能作廢權益

1. All benefits / riders will be cancelled automatically. 所有附加保障將會自動取消。

☐ Fully Paid-Up 繳清長期壽險 (Face amount remains unchanged **保障額維持不變**)

☐ Reduced Paid-Up 減額繳清壽險 (Face amount will be reduced **保障額將會減少**)

☐ Paid-Up Term 繳清定期壽險 / Extended Term Insurance (ETI) 展期定期壽險

7. Change of Death Benefit Option 更改身故賠償選擇

☐ From Face Plus to Level Face 由保額加值改為固定保額

☐ From Level Face to Face Plus 由固定保額改為保額加值

8. Lost Policy Declaration 保單遺失聲明

I/We hereby declare that I/we have lost the policy(ies) and to the best of my/our knowledge, it is not under any other person's possession. The Company is hereby requested to issue policy memorandum (setting out particulars of the policy) according to the Company's records for the policy as at this date. I/We understand that the new policy(ies) memorandum will not be a replacement for the policy(ies). I/We agree to indemnify Sun Life Financial (Hong Kong) Limited / Sun Life Hong Kong Limited against any loss that arise from any actions.
茲聲明，本人/吾等現遺失上述保單，且相信該保單亦非由其他人持有。本人/吾等現謹要求貴公司根據截至本 聲明簽署日期之記錄，簽發保單備忘錄(載有本人保單簽發至今之主要內容及資料)。本人/吾等明白此保單備忘錄並不可以代替原有之保單。本人/吾等同意因此而引發任何對永明金融有限公司 / 香港永明金融有限公司帶來的損失作出彌償。

☐ Request for Policy Memorandum 申請保單備忘錄

☐ Request for duplicate Policy Contract 申請保單副本 (Please pay HK$150 as handling fee. **請繳交手續費150港元。**)

9. Change of Lifelong Protection Lock-in Option 更改終身守護鎖定保障選項

1. This option can only be applied before the 2nd Policy Anniversary and/or before age 65 of the insured.
此選項只能於第2個保單週年及/或受保人65歲前申請。

2. If the addition of Lifelong Protection Lock-in Coverage is declined for 2 consecutive years, this option will be terminated automatically.
倘若連續2年拒絕新增終身守護鎖定保障，該選項將會自動終止。

☐ Apply 申請

☐ Remove 刪除

10. Change of Dollar Cost Averaging Option 更改平均成本選項

Request must be received by Sun Life at least 3 business days before 15th of each calendar month. Otherwise, the change will be applied to next calendar month.
申請必須由永明金融在每月15日之前至少3個工作天收妥，否則有關申請將於下一個曆月處理。

☐ Apply 申請

☐ Remove 刪除

11. Change of Benefit 更改保障

For change to a lower premium basic plan or addition / increase / upgrade of rider benefit, please complete the 'Request for Policy Change (with Personal Certificate of Insurability)' instead.
如更改為較低保費的基本保險計劃或新增 / 增加 / 提升附加保障，請填寫「保單更改申請(附可保證明書)」。
If you intend to reduce premium payable by policy changes 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減少應付保費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。

Basic Plan **基本計劃**	Type of Change **更改類別**	New Sum Assured / Plan Level /Payment Term / Annual Deductible AFTER change **更改後的新保障額 / 保障級別 /供款期 / 墊底費**
	☐ Decrease Sum Assured 減少保障額	
	☐ Decrease Plan Level 減少保障級別	
	☐ Increase Annual Deductible 增加墊底費	
	☐ Reduced Payment Term 減少供款期	

Rider Benefit (Please complete Part 14 in this form if more rider benefits would like to change.) **附加保障 (如欲更改更多附加保障，請填寫本表格第14部份。)**	Delete **刪除**	Change **更改**	New Sum Assured / Plan Level / Annual Deductible AFTER change **更改後的新保障額 / 保障級別 / 墊底費**
	☐	☐	
	☐	☐	
	☐	☐	
	☐	☐	

SunHealth Medical Premier / SunHealth Medical Premier Rider – Privilege of Reducing Annual Deductible
永明滿心醫療保 /永明滿心醫療保附加保 - 減低每年墊底費之權益

1. The privilege is only applicable within 30 days immediately before or after the Policy Anniversary on or immediately following the Insured's 50th, 55th, 60th or 65th birthday; and
此權益只適用於在受保人50、55、60 或 65 歲生辰當日的保單周年日（如同時是保單周年日）或緊隨其後的第一個保單周年日，有關申請須於相關的保單周年日之前或之後的三十（30）日內提出；及
2. This privilege can only be exercised once per lifetime.
受保人終身只能行使此權益一次。

New Annual Deductible **新每年墊底費**

☐ HKD港元0 / USD 美元0 ☐ HKD港元20,000.00 / USD 美元2,500.00 ☐ HKD港元50,000.00 / USD 美元6,250.00

SunHealth Medical Premier / SunHealth Medical Essential – Convertible Option
永明滿心醫療保 /永明精心醫療保 - 可轉換選項

1. Each basic plan/benefit can allow change ONCE only.每個基本計劃/附加保障只可換選一次。
2. Under all circumstances, once this conversion is effective, the Company will not accept any request for cancellation.
於任何情況下，此更改一經生效後，公司將不接受任何取消更改的要求。

Please selected Plan Level /Available Option:
請選擇計劃級別/可用選項:

SunHealth Medical Care
永明貼心醫療保

Plan Level **計劃級別**

☐ Plan 1計劃一 ☐ Plan 2計劃二 ☐ Plan 3計劃三

Available Option **可用選項**

☐ With Optional Supplementary Benefit
加配自選額外保障

12. Currency Change Option **貨幣轉換選項**

1. The policy ('Original Policy') in this form will be automatically terminated from the effective date after completion of policy currency change. The request cannot be withdrawn and changed, and it is non-reversible once approved. After the currency change, a new policy will be issued and become effective with a new policy number assigned to it.
當保單貨幣按生效日期轉換後，本表格上的保單(「原保單」)將自動終止。倘若批核後有關申請不能取消、更改及不可逆轉。轉換貨幣後將會繕發新保單，生效後會重新分配新的保單號碼。

2. After policy currency change, all benefits, terms and conditions and policy information of the Original Policy including but not limiting to the Policy Owner, Insured(s), Policy Date, the Maturity Date (if applicable), the Policy Year, the Beneficiary(ies), the Incapacity Benefit Recipient designation and Death Benefit Settlement Option of the New Policy will be the same as the Original Policy.
保單貨幣轉換後，新保單內的保障、條款與細則及保單資料包括但不限於原保單的保單主權人、受保人、保單日期、滿期日期(如適用)、保單年份、受益人、喪失行為能力保障的指定領取人(如有)及身故保障支付選項(如有)會與新保單完全相同。

3. Total cash value (sum of Guaranteed Cash Value, cash value of the accumulated Reversionary Bonus (if any), cash value of Terminal Bonus (if any) and the amount in the Value Lock-in Account (if any), accumulated Guaranteed Cash Coupon with interest (if any) and the amount in the accumulation account (if any)) and the total premium of the Basic Plan due and fully paid in Original Policy will be converted to the new currency at the exchange rate determined by Sun Life. The notional amount in the new policy after Currency Change will be determined based on the total cash value (excluding the amount in the value lock-in account (if any)), guaranteed cash value scale, reversionary bonus scale and terminal bonus scale of the new currency.
原保單內的總現金價**值**（保證現金價**值**、歸原紅利現金價**值**(如有)、終期紅利現金價**值**(如有)、價**值**鎖定戶口內的金額(如有)、累積保證可支取現金及利息(如有)及累積賬戶的金額(如有)之總和）及基本計劃的到期及已繳保費總額，在轉換保單貨幣時的兌換率會由永明決定。貨幣轉換後, 新保單的名義金額將根據新保單貨幣的總現金價**值**（不包括價**值**鎖定帳戶中的金額（如有））、保證現金價**值**比例、歸原紅利比例及終期紅利比例而定。

4. The notional amount of the new policy after currency changed shall fulfil the minimum amount requirement of the plan.
貨幣轉換後，新保單的名義金額需滿足有關計劃的**最低金額**要求。

5. Currency conversion shall be calculated based on the exchange rate published on Sun Life Hong Kong's official website on the date of receipt of this form.
貨幣兌換將按本表格收件日於永明香港官方網站公布的匯率進行換算。

6. The Original Policy is not under indebtedness and/or under Premium Holiday.
原保單內**沒有**負債及/或進行保費假期。

7. There is no cooling-off Period for the new policy after currency changed.
新保單在轉換貨幣後**不設**冷靜期。

8. The available change of policy currency will be different subject to each insurance plan.
每個保險計劃可供轉換的保單貨幣將有所不同。

9. The effective date to change the policy currency must be as same as the Policy Anniversary Date of the Original Policy.
轉換保單貨幣的生效日期必需與原保單的保單週年日相同。

10. Currency Change Option can be executed on or after the third (3rd) Policy Anniversary. If plan change applied, the change start date can be applied on or after the third (3rd) Policy Anniversary after the new plan issued. Please submit the change request in 30 days in advance the effective date.
第三(3)個保單週年日或之後可行使貨幣轉換選項。如保單曾經更改計劃，其開始轉換日期會由新計劃發出後重新計算第三(3)個保單周年日或之後方可申請。請在保單周年日之前三十(30)日內遞交轉換申請。

11. This option is applicable for specific insurance plans only.
此選項只適用於指定保險計劃。

12. The acknowledgement by irrevocable beneficiary(ies) is required in this form.
此表格必需由不可撤換受益人簽署確認。

New Policy Currency **新保單貨幣：**_____

Upon approval of the change of currency of this Policy by the Company, the new policy will be in effect as of the Policy Anniversary following the submission of your application.
一旦貨幣轉換獲得本公司批准，新保單將於您提交貨幣轉換申請後的保單周年日起生效。

13. Policy Split Option **保單分拆選項**

1. On or after the third (3rd) Policy Anniversary and while the policy is in effect, subject to the approval of Sun Life as its sole and absolute discretion, Policy Owner may split the values under the Original Policy to the new policy.
   於第三(3)個保單周年日或之後及在本保單生效期間，在受限於永明憑完全及絕對酌情權予以批准的前提下，保單主權人可把原保單的價**值**分拆至新保單。

2. The Original Policy before Split is not assigned and the outstanding amount of any loans with interest must have been settled before your request to split the value of the Policy is submitted to us.
   原保單分拆前需未被轉讓及任何未償還的貸款及利息的金額已被繳清。

3. Upon approval of splitting the value of the Original Policy by Sun Life, the new policies will take effect from the effective date of the Policy Split. The policy date, policy year, maturity date (if applicable), Policy Owner, the Insured(s), beneficiary(ies), the Incapacity/Mental Incapacity benefit Recipient designation (if any), Contingent Policy Owner(s) designation (if any) and the Death benefit Settlement Option (if any) of the new policy(ies) will be the same as the Original Policy.
   永明批核原保單的保單價**值**分拆後，新保單將在保單分拆生效日期當日起生效，有關保單日期、保單年度、滿期日期(如適用)、保單主權人、受保人、保單的受益人、喪失行為能力/精神行為力保障的指定領取人(如有)、指定後備保單主權人(如有)及身故保障支付選項(如有)與原保單相同。

4. The application for splitting the value of the Policy cannot be withdrawn or changed once approved.
   保單價**值**分拆至新保單的申請一經批核便不可撤銷及更改。

5. The total Premium due and paid and the policy Values of the Original Policy before Split, including Guaranteed Cash Value, the accumulated Reversionary Bonus (if any), Terminal Bonus (if any), the amount in the Value Lock-in Account (if any), accumulated Guaranteed Cash Coupon with interest (if any) and the amount in the accumulation account (if any) will be allocated to the Split Policies according to the ratio of the respective notional amount applicable to such split policy(ies). For the avoidance of doubt, Original Policy shall be automatically terminated from the effective date of the Policy Split.
   分拆前之原保單之到期及已繳的保費總額及保單價**值**、包括保證現金價**值**、累積歸原紅利(如有)、終期紅利(如有)及價**值**鎖定戶口內的金額(如有)、累積保證可支取現金及利息(如有)及累積賬戶的金額(如有)將會按適用於分拆之保單各自的名義金額之比例分配至分拆之保單。為免存疑，保單分拆生效日後，分拆前之原保單將自動終止。

6. The notional amount of the new policy after Split shall fulfil the minimum amount requirement of the plan.
   保單分拆後，新保單的名義金額需滿足有關計劃的**最低金額**要求。

7. There is NO cooling-off period in the new policy.
   新保單**不設**冷靜期。

8. The Policy Split Option of the Original Policy can be executed on or after the third (3rd) Policy Anniversary. If plan change applied, the change start date can be applied on or after the third (3rd) Policy Anniversary after the new policy issued. Please submit the change request within thirty (30) days before a Policy Anniversary in advance the effective date.
   原保單在第三(3)個保單周年日或之後可行使保單分拆選項。如保單曾經更改計劃，其開始轉換日期會由新保單發出後重新計算第三(3)個保單周年日或之後方可申請。請在保單周年日之前三十(30)日內遞交分拆申請。

9. This option is applicable for specific insurance plans only.
   此選項只適用於指定保險計劃。

10. The acknowledgement by irrevocable beneficiary(ies) is required in this form.
    此表格必需由不可撤換受益人簽署確認。

The percentage (%) of EACH Split Policy(ies) **每份保單分拆的百份比**(%)
The First Split Policy 第一份分拆保單 _____ %
The Second Split Policy 第二份分拆保單 _____ %
The Third Split Policy 第三份分拆保單 _____ %
The Fouth Split Policy 第四份分拆保單 _____ %
The Fifth Split Policy 第五份分拆保單 _____ %

* Please submit 'Application Supplement' separately for more policy split if necessary.
如有需要分拆更多保單，請另行遞交「投保申請補充書」。

**The split percentage (%) must be an integer and the total sum must be 100%.
分拆的百份比必需為整數及總和必須為百分之一百。

14. Others /Special Instruction **其他/特別指示** (Please specify details **請註明詳情**)

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

I/We confirm that I/We have read the Personal Information Collection Statement ("PICS") of Sun Life and understood its effect and impact in respect of my/our personal data collected or held by the Company (whether contained in this form or otherwise). I/We hereby give my/our acknowledgement and agree to the use and transfer of my/our personal data by the Company in accordance with the PICS, including the use and provision of my/our personal data for the purpose of direct marketing subject to my/our right of objection. I/We understand that the updated version of the PICS is available in the Company website (http://www.sunlife.com.hk). I/We understand it is subject to change and agree that my/our information will be handled accordingly.

本人／我們確認本人/我們已閱讀永明金融個人資料收集聲明(「該聲明」)及明白該聲明對貴公司所收集或持有之本人／我們的個人資料的影響（不論是否此表格或從其他途徑所取得）。本人／我們特此確認並同意貴公司，根據該聲明使用及轉移本人／我們的個人資料，包括於本人／我們保留反對權利的情況下，在直接促銷中使用及將本人／我們的個人資料提供予其他人士。本人／我們明白該聲明的最新版本可於貴公司網頁(http://www.sunlife.com.hk)下載。本人／我們明白該聲明將會不時更新並同意本人／我們的個人資料將根據相關更新處理。

16. 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 stated in this 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 and agree Sun Life to collect my/our personal information via electronic means for identity verification upon request.
本人／我們明白及同意永明金融透過電子方式收集本人／我們的個人資料作身份驗證。

I/We hereby request that this policy be changed in accordance with the above particulars with the understanding and agreement that a copy of this request, together with any other relevant declaration/or an Endorsement shall be attached to and form a part of the said policy. I/We hereby agree that any Suicide Provision and any Incontestability Provision in the General Provisions of the policy will apply to the additional benefits added to the policy as a result of the Request, effective from the date this request is approved. Sun Life Hong Kong Limited reserves the right to amend errors made in the completion of the request form.
本人／我們在此要求保單按照上述細則更改，並同意本表格之副本，及其他有關之聲明或批註將附於保單合約內，且成為本保單合約之部份內容。本人/吾等同意保單合約一般條款內任何自殺及不可爭議條款，將適用於此更改申請中之任何新增利益，並以此更改申請獲批核之日期起生效。如於完成此表格時有任何資料錯漏，永明金融保留其更正權。

I/We hereby declare that I/We understand that it is a statutory requirement to pay Levy. Insurance Authority may take legal proceedings against policyholder in respect of any outstanding Levy as civil debt and may impose pecuniary penalty.
本人／我們謹此聲明本人／我們明白支付保費徵費是法定要求。保險業監管局可以根據相關條例，將有關的欠付款作為民事債項及向相關的保單持有人追討欠款並有機會徵收罰款。

I/We understand that this policy service request 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 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。

Required Item and Signature 所需項目及簽署

The below item is 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

Type of Request **申請類別**	Required Items **所需項目**
Dividend Option 紅利運用方式	☐ True copy of the Policy owner's identification proof (if not provided before) 保單主權人身份證明文件真確副本（若之前未曾提交） ☐ Request for Policy Change (with Personal Certificate of Insurability) – only applicable to option "Paid-up Additions" 保單更改申請（附可保證明書）- 只適用於選項「紅利繳清壽險」
Coupon Option 花紅運用方式	☐ True copy of the Policy owner's identification proof (if not provided before) 保單主權人身份證明文件真確副本（若之前未曾提交）
Change of Payment Mode & Method 更改付款形式及繳費辦法	☐ New Direct Debit Authorization for bank account or credit card – applicable to Autopay options 直接付款授權書 - 適用於透過銀行或信用咭自動轉賬
Change of Death Benefit Option 更改身故賠償選擇	☐ Request for Policy Change (with Personal Certificate of Insurability) – only applicable to option "from Level Face to Face Plus" 保單更改申請（附可保證明書）- 只適用於選項「由固定保額改為保額加值」
Lost Policy Declaration 保單遺失聲明	☐ Handling fee HK$150 – only applicable to option "Request for duplicate Policy Contract" 手續費150港元 - 只適用於選項「申請保單副本」

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

X Signature of Policy Owner 保單主權人簽署	Sign Date (DD/MM/YYYY) 簽署日期 (日/月/年)
X Signature of Irrevocable Beneficiary(ies) 不可撤換受益人簽署	Sign Date (DD/MM/YYYY) 簽署日期 (日/月/年)
X Signature of Assignee (if any) *Please refer to Note 1 below 受讓人簽名（如有）***請參見下列附註一**	Sign Date (DD/MM/YYYY) 簽署日期 (日/月/年)

* Note 1 : By signing in this box, the receipt of any amount at the account specified above or by such other means specified above shall be a full discharge and release of Sun Life of its liability to pay the amount to the Assignee under the collateral assignment arrangement relating to the Policy, whether the amount is paid by Sun Life to the Assignee or the Assignor (Policy Owner).

* **附註一：透過在此方格簽署，上述賬戶收到任何金額或任何金額已透過上述其他方法被收取即等如受讓人解除及撤銷永明金融在上述保單相關的抵押轉讓安排下需向受讓人繳付該金額的責任，不論永明金融將該金額向受讓人或轉讓人(保單主權人)繳付亦一樣。**

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**