

Manulife Investment Solutions
Investment Choice Services Form
宏利智富錦囊投資選項服務申請表

Branch code 分行編號： _____ Location 地點： _____

Insurance Advisor code 保險顧問編號： _____

Insurance Advisor's name 保險顧問姓名： _____

Contact no. 聯絡電話： _____

Full Name of First Policyowner 第一保單持有人姓名	Full Name of Second Policyowner 第二保單持有人姓名
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Important Notes 重要事項：

- **All dollar amounts are stated in US dollar unless otherwise stated.** 除特別指明外，所有金額皆以美元為貨幣單位。
- Any amendments should be endorsed by the policyowner in full signature. 任何資料如有更改，保單持有人必須在更改的位置簽署作實。
- Manulife (International) Limited (the "Company") shall have the right to update this form from time to time and to accept or reject the form submitted by you if you fail to fulfill the Company's requirements. 宏利人壽保險(國際)有限公司(「本公司」)有權隨時更新表格內容，如閣下未能符合本公司的有關規定，本公司將保留接受或拒絕閣下遞交之申請表格的權利。
- Please indicate the type of investment choice service requested by putting a "✓" in the appropriate box. 請註明所要求之投資選項服務並於適當方格內填上「✓」號。
- Allocation percentage of each investment choice selected should be in whole number. All dollar amounts should be rounded to two decimal places. 所選每項投資選項分配百分比必須為整數。所有金額數目必須截至小數點後兩個位。
- There are different operations and limitations on Manulife Inv China A Fund and Manulife Inv China Bond Fund. Please refer to the related Addendum to Principal Brochure with respect to these two Investment Choices for details. Major special dealing arrangements are summarized as follows: 「宏利智富中國A股基金」及「宏利智富中國債券基金」設有不同運作方式和交易限制。詳情請參閱產品銷售說明書附錄內有關上述兩個投資選項的資料。現概述其主要交易安排如下：
 - Dealing frequency for these two Choices would normally be once per month. (Cut-off time of any Investment Choice service requests on these Choices is 3:00 p.m. Hong Kong time of the sixth business day prior to the dealing day). Please refer to the Company's public website for dealing day and cut-off day schedule. 這兩個投資選項一般每月接受交易一次(上述投資選項的截數時間為交易日前第六個營業日香港時間下午三時正)。交易日及截數時間表可參閱本公司的網站。
 - Exit fee will be deducted from the proceeds upon redemption, switching-out or full surrender. 贖回、轉出或退保時需從贖回款額中扣除退出費。
 - Settlement limit(s) on redemption/switching-out amount may be applied. 結算限制或適用於贖回或轉出款額。
- Please contact your advisor or call our Customer Service Hotline at 2108 1110 to ascertain the latest available Investment Choices. 請聯絡閣下的顧問或致電宏利客戶服務熱線 2108 1110 查閱最新可供選擇的投資選項。

Part A: Subscription: Single Subsequent / Regular / Change of Existing Regular Subscription Information
第一部份：認購：單次增加認購 / 定期認購 / 更改現有定期認購資料

IMPORTANT: The Company may process the subscription only after the receipt of final payment of subscription monies in full and in cleared funds as stated on the form. 重要：本公司可於收到申請表上所註明的全數並已結算妥當的投資選項認購款項後方處理有關認購。

<input type="checkbox"/> Single Subsequent Subscription ^{(1), (3)} 單次增加認購 ^{(1), (3)} <i>(Please fill in the subscription allocation in the table below. Subscription allocation specified below is applicable to this subsequent subscription only. 請於下表填寫認購分配，以下所填寫之認購分配只應用於是次增加認購。)</i> Payment Currency 付款幣值： <input type="checkbox"/> USD 美元 <input type="checkbox"/> HKD 港元 Payment Amount 付款金額： _____ Paid By 繳付方式： <input type="checkbox"/> Cheque 支票 <input type="checkbox"/> Bank Draft 匯票 <input type="checkbox"/> Transfer from policy no* 調動自保單編號* _____ <small>* For payment transfer from another policy, please state the policy number for our reference. The subscription allocation should be specified in percentage only. 如款項乃調動自另一保單，請註明保單編號以作參考之用。另必須以百分比方式作認購分配。</small>	<input type="checkbox"/> New Application of Regular Subscription ⁽²⁾ 新設定期認購 ⁽²⁾ <i>(Please complete, sign and attach an original Direct Debit Authorization form for setup of bank autopay, and fill in the regular subscription allocation in the table below. 請填寫、簽署及附上直接付款授權書正本以便設立銀行自動轉帳，並於下表填寫定期認購分配。)</i> <input type="checkbox"/> Change of Existing Regular Subscription Information ⁽²⁾ 更改現有定期認購資料 ⁽²⁾ <i>(Please fill in the anticipated changed item below. 請選擇下列須作更改的項目。)</i> Amount 金額 (USD 美元)： _____ Payment Mode 繳付形式： <input type="checkbox"/> Monthly 月繳 <input type="checkbox"/> Semi-Annual 半年繳 <input type="checkbox"/> Quarterly 季繳 <input type="checkbox"/> Annual 年繳 Please specify the effective date 請註明生效日期： _____ (DD 日/MM 月/YYYY 年) <i>(If no specific instruction is given here, the effective date will be the request processing date. 若閣下於此欄並無作出特別指示，生效日期將以處理申請當日為準)</i>
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Source(s) of fund for all subscriptions 所有認購款項來源：

Savings 儲蓄 Wages income 受僱收入 Self-employment income 自僱收入 Investment income 投資收入

Sale of an asset 出售資產 Gift or inheritance 饋贈或遺產 Settlement of insurance 保險收款

Other (please specify) 其他 (請註明) _____

The Chinese version of this application is for reference only. In the event of conflicts between the Chinese and the English versions, the English version shall prevail. 此申請表之中文譯本只供參考之用，若與英文有異，一概以英文為準。

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Part A: Subscription: Single Subsequent / Regular / Change of Existing Regular Subscription Information (Continued)			
第一部份：認購：單次增加認購 / 定期認購 / 更改現有定期認購資料(續)			
Single Subsequent[^] Subscription Allocation 單次增加認購分配[^]	Investment Choice Name 投資選項名稱	Code 編號	Regular Subscription Allocation[^] 定期認購分配[^]
<input type="checkbox"/> % 百分比 <input type="checkbox"/> Amounts 金額 (USD 美元)			<input type="checkbox"/> % 百分比 <input type="checkbox"/> Amounts 金額 (USD 美元)
Lifestyle Portfolios 人生階段組合			
	Manulife Inv Aggressive Portfolio 宏利智富進取組合	IAF01	
	Manulife Inv Growth Portfolio 宏利智富增長組合	IGR01	
	Manulife Inv Balanced Portfolio 宏利智富均衡組合	IBP01	
	Manulife Inv Stable Portfolio 宏利智富平穩組合	ISF01	
Equity Portfolios 股票組合			
	Manulife Inv Asia Pacific High Dividend Fund 宏利智富亞太高息基金	IPH01	
	Manulife Inv Asian Small Cap Fund 宏利智富亞洲小型公司基金	IAS01	
	Manulife Inv Australia Equity Fund 宏利智富澳洲股票基金	IAU01	
	Manulife Inv China Value Fund 宏利智富中華威力基金	ICV01	
	Manulife Inv Citi China Select Fund 宏利智富花旗中國精選基金	ICC01	N/A
	Manulife Inv Emerging Eastern Europe Fund 宏利智富新興東歐基金	IEM01	
	Manulife Inv European Equity Fund 宏利智富歐洲股票基金	IEE01	
	Manulife Inv Global Contrarian Fund 宏利智富環球反向策略基金	ICN01	
	Manulife Inv Global Resources Fund 宏利智富環球資源基金	IRF01	
	Manulife Inv Healthcare Fund 宏利智富康健護理基金	IHC01	
	Manulife Inv Hong Kong Equity Fund 宏利智富香港股票基金	IHE01	
	Manulife Inv India Equity Fund 宏利智富印度股票基金	IEQ01	
	Manulife Inv International Equity Fund 宏利智富國際股票基金	IIE01	
	Manulife Inv Japan Equity Fund 宏利智富日本股票基金	IJE01	
	Manulife Inv Korean Equity Fund 宏利智富韓國股票基金	IKE01	
	Manulife Inv Latin America Equity Fund 宏利智富拉丁美洲股票基金	ILA01	
	Manulife Inv Macquarie IPO China Gateway Fund 宏利智富麥格理中國 IPO 飛躍基金	IMA01	
	Manulife Inv North American Equity Fund 宏利智富北美股票基金	INA01	
	Manulife Inv Pacific Asia Equity Fund 宏利智富亞太大股票基金	IPA01	
	Manulife Inv Russia Equity Fund 宏利智富俄羅斯股票基金	IRE01	
	Manulife Inv Taiwan Equity Fund 宏利智富台灣股票基金	ITW01	
	Manulife Inv Templeton Frontier Markets Fund 宏利智富鄧普頓前線市場基金	IFM01	
	Manulife Inv Thailand Equity Fund 宏利智富泰國股票基金	ITE01	
	Manulife Inv Turkey Equity Fund 宏利智富土耳其股票基金	ITF01	
	Manulife Inv US Small Cap Fund 宏利智富美國小型公司基金	IUS01	
	Manulife Inv Zeal Voyage Zelec China Fund 宏利智富行健宏揚中國實力基金	IVY01	
Bond Portfolios 債券組合			
	Manulife Inv Asia Total Return Fund 宏利智富亞洲總回報基金	ITR01	
	Manulife Inv Global Emerging Markets Debt Fund 宏利智富新興市場債券基金	IMD01	
	Manulife Inv Global Strategic Income Fund 宏利智富環球策略收益基金	ISI01	
	Manulife Inv U.S. Treasury Inflation-Protected Securities Fund 宏利智富美國抗通脹債券基金	IUT01	
Cash Portfolio 現金組合			
	Manulife Inv Cash Fund 宏利智富現金基金	ICF01	
	Other 其他：		
	Other 其他：		
	Other 其他：		
← TOTAL 合計 (100% OR 或 USD 美元) →			

[^] You should specify the subscription allocation either in percentage or by amounts by putting a "✓" in the appropriate box, except for payment transfer where the subscription allocation should be specified in percentage only. For subscription allocation by amounts, the amount of each investment choice selected and the total amount should be specified in USD regardless of the payment currency. 閣下必須於適當方格填上「✓」號以註明以百分比或指定金額方式作認購分配；如涉及調動款項，則必須以百分比方式作認購分配；如欲以指定金額方式作認購分配，不論任何付款幣值，所選每項投資選項之金額及總額均須以美元作為貨幣單位。

Part A: Subscription: Single Subsequent / Regular / Change of Existing Regular Subscription Information (Continued)**第一部份：認購：單次增加認購 / 定期認購 / 更改現有定期認購資料(續)****Remarks on Part A 第一部份註釋**

- (1) Minimum subsequent subscription is USD1,500 per policy and USD250 per investment choice or its equivalent HKD. If no subscription allocation is specified for this subscription, existing subscription allocation will be used to subscribe the investment choices. Existing subscription allocation refers to the latest instructed regular subscription allocation, if not available, it refers to the initial subscription allocation. 每份保單之最低增加認購金額為 1,500 美元，每項投資選項之最低增加認購金額為 250 美元，或其相等價值之港元。若是次認購沒有註明有關認購分配，則按現時認購分配作投資選項認購。現時認購分配指最近發出的定期認購分配指示，如未有發出指示，則按照首次認購分配辦理。
- Please make cheque/bank draft payable to: "Manulife (International) Limited". 支票/匯票抬頭人請寫「宏利人壽保險(國際)有限公司」。
- (2) Minimum regular subscription is USD500 per policy and USD250 per investment choice or its equivalent HKD. 每份保單之最低定期認購金額為 500 美元，每項投資選項之最低定期認購金額為 250 美元或其相等價值之港元。
- The regular subscription allocation will be effective as soon as the Company considers applicable. Future subsequent and regular subscription will follow the regular subscription allocation specified in the table of Part A, which will override and update your existing subscription/auto-switching allocation filed with the Company. 本公司將依據最快可行之日期作為定期認購分配之生效日。將來之增加及定期認購將按照第一部份表內列明之定期認購分配，該認購/自動轉換分配將取代及更新閣下於本公司的現有認購/自動轉換分配記錄。
- (3) If it involves currency exchange, the currency exchange rate will be provided by the Company from time to time. For the latest exchange rate, please contact your Insurance Advisor or visit the Company's web site at www.manulife.com.hk. 如涉及貨幣兌換，本公司將不時提供有關貨幣的兌換率。如欲查閱最新的兌換率，請聯絡閣下之保險顧問或瀏覽本公司的網站 www.manulife.com.hk。
- (4) No subsequent subscription is currently allowed for Manulife Inv China A Fund and Manulife Inv China Bond Fund. 「宏利智富中國A股基金」及「宏利智富中國債券基金」在申請期過後暫不設增加認購之安排。
- (5) No regular subscription is currently allowed for Manulife Inv Citi China Select Fund. 「宏利智富花旗中國精選基金」暫不設定期認購之安排。

Part B: Switching: Single/Regular Auto 第二部份：轉換：單次轉換/定期自動轉換

The policyowner requests the Company to switch the existing investment choice to the following investment choice(s) as stated below.

保單持有人要求本公司對現有投資選項作出下列轉換。Please put a "✓" in the appropriate box 請於適當方格內填上「✓」號。

□ Single Switching 單次轉換**□ Regular Auto-Switching 定期自動轉換**

Amount per Switching 每次轉換金額 (USD 美元) : _____ **No. of Switching 轉換次數 :** _____ (If "No. of Switching" is not filled in, the regular auto-switching will continue until the account value of the switching-out investment choice is used up. Such regular auto-switching will resume automatically when the switching-out investment choice has value again and will stop when the value is used up. This action will take place on a recurring basis until a new instruction is officially given by the policyowners. 如未提供轉換次數，定期自動轉換便會自動，直至轉出投資選項的帳戶價值用盡為止。若轉出投資選項重新增值，定期自動轉換仍將自動延續，直至轉出投資選項的帳戶價值用盡為止。有關程序將自動重複，直至保單持有人另行作出正式指示。)

Switching Mode 轉換形式 : Monthly 每月 Quarterly 每季 Semi-Annual 每半年 Annual 每年 **Effective date 生效日期 :** _____ (DD 日/MM 月/YYYY 年)
(The effective date can be any dealing day of a month except 29th, 30th or 31st; If no specific instruction is given here, the effective date will be the request processing date 除 29、30 及 31 日，可接受一個月的任何一個交易日；若閣下於此欄並無作出特別指示，生效日期將以處理申請當日為準)

FROM Switching Out 由：轉出 Code 編號	Switching Out 轉出		TO Switching In 至：轉入 Code 編號
	<input type="checkbox"/> % 百分比 (only available for single switching 只適用於單次轉換)	<input type="checkbox"/> Units 單位 (only available for single switching 只適用於單次轉換) <input type="checkbox"/> Amounts 金額 (USD 美元)	

Remarks on Part B 第二部份註釋

- No regular auto-switching/ switching-in is allowed for Manulife Inv Citi China Select Fund, Manulife Inv China A Fund and Manulife Inv China Bond Fund. 「宏利智富花旗中國精選基金」、「宏利智富中國A股基金」及「宏利智富中國債券基金」暫不設定期自動轉換/轉入安排。
- Manulife Inv China A Fund and Manulife Inv China Bond Fund can be switched out in terms of unit/ percentage to Manulife Inv Cash Fund only. 「宏利智富中國A股基金」及「宏利智富中國債券基金」只容許以百分比或單位形式轉至「宏利智富現金基金」。
- Exit fee (if any), up to 0.3% of redemption amount, will be deducted from the proceeds upon redemption, switching-out or full surrender for Manulife Inv China A Fund and Manulife Inv China Bond Fund. 「宏利智富中國A股基金」及「宏利智富中國債券基金」贖回、轉出或退保時需從贖回款額中扣除不多於0.3%之退出費用(如適用)。
- Please note that no more than one switch instruction (regardless of whether it is given by fax or by whatever means) should be given to us with respect to the SAME switch option for the SAME POLICY on the SAME DAY (cut-off time is 3:00 p.m. Hong Kong time). If more than one SAME switching instruction with respect to the same policy is received by us on the same day, we may, but are not obliged to, contact you to clarify your instruction. This may lead to delay in our processing of your instruction. For the avoidance of doubt, we shall have the sole right and discretion to accept or reject your subsequent instructions if you give SAME switching instructions with respect to the same policy more than once to us on the same day. 請勿於同一日內(截至香港時間下午三時止)就同一份保單提交相同的轉換指示多於一次(無論透過傳真或任何方式)。如公司於同一日內超過一次收到有關同一份保單的相同轉換指示，我們可能(但並非必須)聯絡閣下以作確認，因此閣下的指示或會延遲處理。為清晰起見，如公司在同一日內接到閣下就同一份保單提交相同轉換指示多於一次，我們有權接受或拒絕受理其後的相同轉換指示。
- Please fill in the Code by referring to the next section. This form can be used for a maximum of 5 switching instructions. 請參考下一部份並填上編號。此表格可作最多五項轉換指示。
- Minimum switching from one investment choice to another investment choice is USD250. This minimum requirement is applicable to all of the above switching types. 每次由一項投資選項轉換至另一項投資選項之最低轉換金額為 250 美元，此最低轉換金額有效於上述所有轉換。
- If the remaining Account Value of the switching out investment choice is less than USD1,500, all selected investment choices, less switching fee and/or exit fee (if any), of that investment choice may at the Company's discretion be switched to the switching in investment choice according to the above allocation instruction. 如轉換後的投資選項帳戶價值低於 1,500 美元，本公司有權將所有轉出投資選項按上述分配於扣除轉換費及/退出費(如適用)後轉換至轉入投資選項。
- The regular auto-switching arrangement will be stopped when the amount is used up. Regular switching will resume automatically when the switching-out investment choice has value again and will stop when the value is used up. 若有關金額已沒有餘額，定期自動轉換安排會自動停止。如轉出的投資選項日後出現價值時，自動轉換便會自動恢復，直至帳戶價值用完。
- The regular auto-switching allocation will be effective as soon as the Company considers applicable, and its allocation specified in the above table will override and update your existing regular auto-switching allocation filed with the Company. 本公司將依據最快可行之日期作為定期自動轉換分配之生效日，及其以上表內列明之轉換分配將取代及更新閣下於本公司的現有自動轉換分配記錄。

To comply with the industry guidelines, for application for redemption or full surrender, please attach copy of policyowner's HKID card/Passport/ Business Registration Certificate. Please state the policy number(s) on the attached copy.

為遵守保險業務守則，如屬申請贖回或全數退保，請附上保單持有人的香港身份證／護照／商業登記證副本，並請於該副本上註明保單編號。

<input type="checkbox"/> Part C: Redemption 第三部份：贖回 (Please complete Part E 請填寫第五部份)				
The policyowner requests the Company to redeem the investment choice as stated below. The percentage(%) / units / amounts to be redeemed is indicated as follows. 保單持有人要求本公司贖回下列投資選項，所贖回的百分比(%) / 單位 / 金額列明如下。				
Investment Choice Name 投資選項名稱	Code 編號	Percentage (%) 百分比	Units 單位	Amounts (USD) 金額 (美元)
Lifestyle Portfolios 人生階段組合				
Manulife Inv Aggressive Portfolio 宏利智富進取組合	IAF01	%		
Manulife Inv Growth Portfolio 宏利智富增長組合	IGR01	%		
Manulife Inv Balanced Portfolio 宏利智富均衡組合	IBP01	%		
Manulife Inv Stable Portfolio 宏利智富平穩組合	ISF01	%		
Equity Portfolios 股票組合				
Manulife Inv Asia Pacific High Dividend Fund 宏利智富亞太高息基金	IPH01	%		
Manulife Inv Asian Property Fund 宏利智富亞洲物業基金	IAP01	%		
Manulife Inv Asian Small Cap Fund 宏利智富亞洲小型公司基金	IAS01	%		
Manulife Inv Australia Equity Fund 宏利智富澳洲股票基金	IAU01	%		
Manulife Inv China A Fund 宏利智富中國 A 股基金	IQA01	%		N/A
Manulife Inv China Value Fund 宏利智富中華威力基金	ICV01	%		
Manulife Inv Citi China Select Fund 宏利智富花旗中國精選基金	ICC01	%		
Manulife Inv Emerging Eastern Europe Fund 宏利智富新興東歐基金	IEM01	%		
Manulife Inv European Equity Fund 宏利智富歐洲股票基金	IEE01	%		
Manulife Inv Global Contrarian Fund 宏利智富環球反向策略基金	ICN01	%		
Manulife Inv Global Resources Fund 宏利智富環球資源基金	IRF01	%		
Manulife Inv Healthcare Fund 宏利智富康健護理基金	IHC01	%		
Manulife Inv Hong Kong Equity Fund 宏利智富香港股票基金	IHE01	%		
Manulife Inv India Equity Fund 宏利智富印度股票基金	IEQ01	%		
Manulife Inv International Equity Fund 宏利智富國際股票基金	IIE01	%		
Manulife Inv Japan Equity Fund 宏利智富日本股票基金	IJE01	%		
Manulife Inv Korean Equity Fund 宏利智富韓國股票基金	IKE01	%		
Manulife Inv Latin America Equity Fund 宏利智富拉丁美洲股票基金	ILA01	%		
Manulife Inv Macquarie IPO China Gateway Fund 宏利智富麥格理中國 IPO 飛躍基金	IMA01	%		
Manulife Inv Middle East and North Africa Equity Fund 宏利智富中東及北非股票基金	IMN01	%		
Manulife Inv North American Equity Fund 宏利智富北美股票基金	INA01	%		
Manulife Inv Pacific Asia Equity Fund 宏利智富亞太股票基金	IPA01	%		
Manulife Inv Russia Equity Fund 宏利智富俄羅斯股票基金	IRE01	%		
Manulife Inv Taiwan Equity Fund 宏利智富台灣股票基金	ITW01	%		
Manulife Inv Templeton Frontier Markets Fund 宏利智富鄧普頓前線市場基金	IFM01	%		
Manulife Inv Thailand Equity Fund 宏利智富泰國股票基金	ITE01	%		
Manulife Inv Turkey Equity Fund 宏利智富土耳其股票基金	ITF01	%		
Manulife Inv US Small Cap Fund 宏利智富美國小型公司基金	IUS01	%		
Manulife Inv Zeal Voyage Zelec China Fund 宏利智富行健宏揚中國實力基金	IVY01	%		
Bond Portfolios 債券組合				
Manulife Inv Asia Total Return Fund 宏利智富亞洲總回報基金	ITR01	%		
Manulife Inv China Bond Fund 宏利智富中國債券基金	IRM01	%		N/A
Manulife Inv Global Emerging Markets Debt Fund 宏利智富新興市場債券基金	IMD01	%		
Manulife Inv Global Strategic Income Fund 宏利智富環球策略收益基金	ISI01	%		
Manulife Inv International Bond Fund 宏利智富國際債券基金	IIB01	%		
Manulife Inv U.S. Treasury Inflation-Protected Securities Fund 宏利智富美國抗通脹債券基金	IUT01	%		
Cash Portfolio 現金組合				
Manulife Inv Cash Fund 宏利智富現金基金	ICF01	%	N/A	
Other 其他：		%		
Other 其他：		%		
Other 其他：		%		

