

# APPLICATION FOR **CHANGE / POLICY PAYMENT** (INVESTMENT-LINKED POLICY)

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更改/保單提款	(與投資相連的壽險計劃	) 申請表

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	visor		•					
	顧問		_					
Adv	visor	's na	me					
保險	顧問	姓名	_					
Cor	itact	no.						
聯絡	電話							

full name of policyowner 保單持有人姓名:	II nan	ne of policy	owner 保	選持有 /	(姓名	:
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#### Important Notes 重要事項:

- This application form is only applicable for Alpha, Alpha Regular Investor, Matrix, ManuSelect Investment Protector (MIP), Flexible Investment Protector (FIP), Variable Investment Protector (VIP+) and Manugift. 此申請表只適用於「傲富投資理財計劃」、「傲峰定期投資計劃」、「邁駿投資理財計劃」、「宏利精選投資保」、「靈活投資寶」、「萬利保障計劃」及「宏寶」。
- Please complete this form in English BLOCK letters legibly with policyowner's signature that corresponds with the company record. Any amendments should be clearly indicated and counter-signed by the policyowner.
- 請用英文·正楷清楚地填寫此表格,並由保單持有人簽署,而簽名必須與本公司檔案相符。任何資料如有更改,保單持有人必須清楚註明並在更改的位置簽署作實。 3. Please ensure the correct Code is used by referring to the Investment Choice Table and read the remarks before form filling (if applicable).
- 請參考投資選項表以便填上正確的編號,並於填寫此表格前參閱有關部份之註釋(如適用)。
- 4. Please put a " v " in the appropriate box(es). All dollar amounts are stated in the policy currency unless otherwise stated. 請於適當方格內填上「」」號。除特別指明外,所有金額之幣值皆為保單幣值。
- You should select the investment choice(s) only if you understand the nature and risks of the investment choice(s) and its underlying fund(s), and have sufficient net worth to be able to assume the risks and bear the potential losses of trading in relation to the investment choices selected. 閣下在選擇投資選項前,請閣下必須了解該投資選項及相關基金的性質及風險,並需要持有足夠的淨資產承擔與所選投資選項有關的相關風險並承擔有關的潛在損失;否則,閣下不應選擇 該投資選項。
- You may be exposed to the additional associated risks if the selected mix of investment choices you intend to subscribe or switch in after policy inception may be inconsistent with your risk profile and knowledge (including investment knowledge in derivatives). . 如閣下打算在保單生效後選擇認購的投資選項組合或者轉入的投資選項組合,與閣下的風險承擔能力及知識(包括對衍生產品的相關投資知識)不相符,則閣下可能需承受額外相關風險。
- You may be exposed to additional associated risks if you are investing in investment choice(s) of which underlying fund(s) is/are classified as derivative fund(s). The volatility of these underlying fund(s) may increase or decrease from their derivative usage, and may suffer losses. Please refer to the offering documents of the respective underlying fund(s) for details. 如関下所釋的投資運項連繫至的相關基金被歸類為衍生產品基金,閣下或因而可能需承受額外相關風險。此等相關基金的波幅或因衍生產品的使用而上升或下降,或因而出現虧損。詳情請 參閱各相關基金的銷售文件。
- 8. The following changes become effective from February 3, 2016 (the "Effective Date"). 以下更改於2016年2月3日(「生效日」)起生效。

  - Matrix, Alpha and Alpha Regular Investor:
    MIL Achiever Fund, MIL Global Fund, MIL Growth Fund and MIL Stable Fund (the "Closing Investment Choice(s)") are closed to new subscription, regular subscription and switch-in if you do not have any units in such Closing Investment Choice(s) on or after the Effective Date. If you have arranged regular subscription to the Closing Investment Choice(s) but your holdings are reduced to zero on or after the Effective Date, your future subscription will be automatically allocated to MILAmundi Cash Fund (previously named MIL Cash Fund). 邁駿投資理財計劃,傲富投資理財計劃及傲峰定期投資計劃:
    - 若閣下於生效日或以後並未持有MIL進取基金、MIL環球基金、MIL增長基金及MIL穩健基金(「將停止投資躩項」)的任何單位,將不能進行新認購、定期認購及轉入至該將停止投資 選項。若閣下已安排定期進行認購將停止投資選項,而當閣下持有該將停止投資選項之單位數量於生效日或以後遞減至零,該將停止投資選項之新認購將會自動被分配至MIL東方匯理 現金基金(前稱MIL現金基金)。
- ManuSelect Investment Protector (MIP):
  ManuSelect Achiever Fund, ManuSelect Balanced Fund, ManuSelect Global Fund, ManuSelect Growth Fund and ManuSelect Stable Fund (the "Closing Investment Choice(s)") are closed to new subscription, regular subscription and switch-in if you do not have any units in such Closing Investment Choice(s) on or after the Effective Date. If you have arranged regular subscription to the Closing Investment Choice(s) but your holdings are reduced to zero on or after the Effective Date, your future subscription will be automatically allocated to Cash Fund (previously named Deposit Fund (Series II)). 宏利精潠投資保:
  - 若閣下於生效日或以後並未持有宏利精選進取基金、宏利精選均衡基金、宏利精選環球基金、宏利精選增長基金及宏利精選穩健基金(「將停止投資選項」)的任何單位,將不能進行新 認購、定期認購及轉入至該將停止投資選項。若閣下已安排定期進行認購將停止投資選項,而當閣下持有該將停止投資選項之單位數量於生效日或以後遞減至零,該將停止投資選項之新 認購將會自動被分配至現金基金(前稱儲蓄基金(系列二))
  - Flexible Investment Protector (FIP):
    - If any switch-out / redemption is made to Deposit Fund (Series I), it will only be withdrawn from Deposit Fund (Series I) instead of first withdrawing from Cash Fund (previously named Deposit Fund (Series II)) even if there is a credit balance in Cash Fund. For all transactions relating to Deposit Fund (Series I), please directly write down the code of Deposit Fund (Series I). Please also be aware that Deposit Fund (Series I) provides a minimum annual interest rate of 4%, but no new subscription /switch-in to such investment choice is allowed anymore and only switch-out / redemption is allowed. 靈活投資寶:
    - 任何從儲蓄基會(系列一)的轉出/贖回,均只會由儲蓄基金(系列一)中提取,即使現金基金(前稱儲蓄基金(系列二)存有結餘,亦不會先從現金基金中提取。如您想進行儲蓄基金 (系列一)相關之交易,請直接填寫儲蓄基金(系列一)之編號。請留意,儲蓄基金(系列一))提供不少於4%的年利率,惟此投資選項已不再接受新認購/轉入。只接愛轉出/贖回。
- 9. Manulife (International) Limited (the "Company" or "Manulife") 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」或「宏利」)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。
- 10. To effect the instruction, this form should be completed, signed and received by the Company by 3:00 p.m. Hong Kong time provided that the day is a dealing day. 如欲辦理有關指示,須填妥並簽署本表格,並於交易目內香港時間下午3時前送達本公司。
- 11. Please provide the information required in this form, otherwise, the Company would not be able to comply with the relevant regulatory requirements. If you do not provide us the necessary information/forms in timely manner, the Company may not be able to process your application or may even reject your application and we will not bear any loss that may arise. 請根據此表格提供所需資料,否則,本公司將無法遵從相關規管要求。如閣下未能及時提交需要的資料/表格,本公司可能無法處理閣下的申請甚或拒絕閣下的申請,亦不會承擔任 何可能因此引致的損失。
- 12. You are advised to complete the Risk Profile Questionnaire to assess your risk profile before investing. Please visit our website or contact your licensed insurance intermediary for details of the risk level of the respective investment choice. 我們建議閣下於投資前填寫「風險承擔能力問卷」以評估閣下之風險承受程度。有關各相關投資選項的風險級別詳情,請瀏覽本公司網頁或聯絡閣下的持牌保險中介人。
- 3. You are advised to complete the Risk Profile Questionnaire to assess your risk profile again if there are any material changes to the information in the questionnaire provided previously and / or the questionnaire provided was submitted over 12 months. Please visit our website or contact your insurance advisor for details of the risk level of investment choice(s). 如閣下於較早前遞交的「風險承擔能力問卷」內所提供的資料有重大變更及/或閣下所提供的問卷已超過12個月,我們建議閣下重新填寫該問卷以評估閣下之風險承受程度。有關投資選項的風險級別詳情,請瀏覽本公司網頁或聯絡閣下的保險顧問。
- 14. Please read the Notice to Customers relating to the Personal Data (Privacy) Ordinance (version 20130401-01) ("Notice") before you complete this form. The Notice available on Manulife's website (www.manulife.com.hk) or upon request from your Manulife Advisor. By completing and returning to Manulife the form, you are agreeing to the Notice. 當閣下填寫此表格前,請閱畢《有關〈個人資料(私隱)條例〉的客戶通知(20130401-01版本)》。該通知可於宏利網此(www.manulife.com.hk)或向閣下的宏利顧問索取。透過填妥及 交回此表格,即表示閣下同意該通知之內容。

Type of Application 申請	類別	Please complete and submit 請填寫並遞交
□ Switching 調配		Section A (Part 1A) 第一項 (1A部份)
□ Investment/Premiu Instruction: For the A 投資/保費分配指示 交的款項	ttached Payment	<ul> <li>Section A (Part 1B) 第一項 (1B部份)</li> <li>The Payment 有關款項</li> </ul>
□ Investment/Premiu Instruction: For the Fi Payment 投資/保費分 將來的投資/繳費	uture Investment/	• Section A (Part 1C) 第一項 (1C部份)

Type of Application 申請類別	Please complete and submit 請填寫並遞交
□ Policy Loan 保單貸款	<ul> <li>Section A (Part 3) 第一項 (第三部份)</li> <li>Section B 第二項</li> <li>Relevant identity document(s) 有關身份証明文件</li> </ul>
□ Withdrawal 提取金額	<ul> <li>Section A (Part 4) 第一項 (第四部份)</li> <li>Section B 第二項</li> <li>Relevant identity document(s) 有關身份証明文件</li> </ul>
□ Full Surrender 全數退保	<ul> <li>Section A (Part 5) 第一項 (第五部份)</li> <li>Section B 第二項</li> <li>Relevant identity document(s) 有關身份証明文件</li> </ul>

Manulife is hereby requested to change certain particulars of the above numbered policy in accordance with the following information and is authorized, on account of the change, to amend the policy in accordance with the Company's practice. 保單持有人要求宏利根據下列資料對上述保單之部份資料作出更改,並授權宏利就有關更改按公司慣例對保單作出修改。

Policy No.						
保單編號						

## SECTION A: CHANGE / POLICY PAYMENT 第一項:更改/保單提款

#### Remarks on Section A 第一項註釋

- 1. The allocation percentage of each investment choice selected should be in whole number.
  - 所選每項投資選項分配百分比必須為整數。
- 2. For Alpha, Alpha Regular Investor, Matrix, MIP and FIP, the minimum allocation percentage of each switching in investment choice is 10%. For Variable Investment Protector (VIP+) and Manugift, the minimum allocation percentage is 20%.
  - **傲富投資理財計劃、傲峰定期投資計劃,邁駿投資理財計劃、宏利精選投資保及靈活投資實之每項轉入投資選項的最少分配百分比為10%,萬利保障計劃及宏寶的最少分配百分比則為20%。**
- 3. The requested transfer out amount is subject to the maximum available unit(s)/amount of each investment choice. 可調動之金額以該投資還項之最高可動用的單位/金額為限。
- 4. This form if properly completed, signed and received by Manulife by 3:00p.m. Hong Kong time on a dealing day (which is any day on which the banks in Hong Kong are open for business, excluding Saturdays and Sundays or such other day as the Company may from time to time determine), it will be treated as being received by Manulife on that day. 如已填妥及簽署此表格,並於交易日的日子及香港時間下午三時或以前送 交宏利,宏利將視為於當日收妥有關表格。交易日指在香港的銀行營業的任何一日(星期六及星期日除外)或本公司不時決定的其他日子。

Part 1A: Switching	第1A部份	:	調配
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* Please pu	it a "✓"in the appropriate box.	請於適當方格	内填上   ✔」	號。				
Table 1A-1	表 1A-1		Table 1A-2	表 1A-2		Table 1A-3	表 1A-3	
Account, 引調配(適用資計劃:社 本儲蓄帳)	,for Alpha / Alpha nitial Account, Matrix-Ba MIP, FIP, VIP + and Manug 目於「傲富投資理財計劃 / 長 別期帳戶」、「邁駿投資理則 戶」、「宏利精選投資保」 「萬利保障計劃」及「宏寶」	nseSavings ift 傲峰定期投 才計劃:基 、「靈活投	Accumula 調配(適月	for Alpha / Alpha Regular tion Account 目於「傲富投資理財計劃 / 〈 累積帳戶」)		Account 調配(適用	for Alpha / Matrix-Prlvil 用於「傲富投資計劃/邁駿 6投資帳戶)	
FROM Switching Out 由: 轉出 Code 編號	Switching Out* 轉出*  □ % 百分比 □ Units 單位	TO Switching In 至: 轉入 Code 編號	FROM Switching Out 由: 轉出 Code 編號	Switching Out* 轉出*  □ % 百分比 □ Units 單位	TO Switching In 至: 轉入 Code 編號	FROM Switching Out 直: 轉出 Code 編號	Switching Out* 轉出* □ % 百分比 □ Units 單位	TO Switching In 至: 轉入 Code 編號
只適用於所轉 Do you have in choice(s) etc.)?	e if the corresponding underlying fun 以之投資選項的相關基金被香港 nvestment knowledge and experience 投資於衍生工具的金融產品有相 No 否	證券及期貨事務 in financial pro	务監察委員會界 ducts with deriv	皇定為衍生產品基金。 atives exposure (e.g. prior experienc	e in trading deriv	vative funds or in	n selecting derivative funds as under	

### Remarks on Part 1A 第1A部份註釋

(Please complete Part 2 if your answer is "NO". 如閣下的答案是"否",請填寫第二部份。)

- 1. Please note that no more than one switching instruction (regardless of whether it is given by whatever means) should be given to us with respect to the SAME switching option for SAME POLICY on the SAME DAY (cut-off time is 3:00 p.m. Hong Kong time). If more than one 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 instructions if you give multiple instructions with respect to the same policy 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調配指示多於一次(無論透過任何方式)。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多次指示,我們有權接受或拒絕受理。
- 2. Depending on the plan type, free switching requests per Policy Year are limited to: Alpha / Alpha Regular Investor / Matrix / ManuSelect Investment Protector Unlimited; other plans 1. Switching fee will be levied for each subsequent switching.
  - 視計劃而定,每保單年度均可獲指定次數的免費調配:傲富投資理財計劃/做峰定期投資計劃/邁駿投資理財計劃/宏利精選投資保為不限次數;其他計劃為1次。其後每次調配則需徵收調配費用。
- 3. For Alpha, switching of investment choice among Initial Account, Accumulation Account and Privilege Top-up Account is not allowed. 如屬傲富投資理財計劃,初期帳戶、累積帳戶及尊尚投資帳戶內的投資選項不可作跨帳戶調配。
- 4. For Matrix, switching of investment choices between Base Savings Account and Privilege Top-up Account is not allowed. 如屬邁駿投資理財計劃,基本儲蓄帳戶及尊尚投資帳戶內的投資選項不可作跨帳戶調配。
- 5. For Alpha Regular Investor, switching of investment choices between Initial Account and Accountalian Account is not allowed. 如屬傲峰定期投資計劃,初期帳戶及累積帳戶內的投資選項不可作跨帳戶調配。

T31 (08/2022) 2 of 8

Policy No.	

Part 1B: Investment / Premium Allocation Instruction: For the Attached Payment 第1B部份:投資/保費分配指示:適用於隨表格遞交的款項									
Please submit the payment together wi Investment / premium allocation speci	th this Form to the <u>Cashier</u> . 請將款項連同此表格 fied below is applicable to <u>this</u> investment or payr	K遞交到 <u>繳費處</u> 。 ment only. 下表所填寫之投資/保費分配戶	J.應用於 <u>是次</u> 投資或繳費。						
Policyowner's Personal Information a	nd Particulars 保單持有人個人資料								
Occupation 職業:									
Highest Education Level Attained 閣下自	的教育程度為:								
☐ A) Primary school or below 小學或以	下 □ B) Secondary school 中學 □ (	C) Post-secondary/College 專科/專上學院	■ D) University or above 大學程度或以上						
Table 1B-1 表 1B-1		Table 1B-2 表 1B-2							
定期總保費及微費 (適用於「適鑒投資理財計劃基 Planned Premium and Levy (applicable to MIP, FI 「靈活投資資」、「萬利保障計劃」及「宏寶」) Payment Amount 付款金額:	latrix - Base Savings Account, Alpha / Alpha Regular Investor) 本儲蓄帳戶 、「做宿投資理財計劃,做岭定期投資計劃」)OR 或 IP, VIP+ and Manugift)按期保費及微費 (適用於「宏利精選投資保」、	□ Top-up Premium and Levy 額外投資 <u>OR 或</u> Unscheduled Payment and Levy 額							
□ USD 美元 □ HKD 港元	\$	Payment Amount 付款金額:							
□ Loan Repayment 償還貸款 Payment Amount 付款金額: □ USD 美元 □ HKD 港元	\$	□ USD 美元 □ HKD 港元	\$						
Code 編號	Investment / Premium Allocation % 投資/保費分配百分比	Code 編號	Investment / Premium Allocation % 投資/保費分配百分比						
	%		%						
	%		%						
	%		%						
	%		%						
	%		%						
	%		%						
	%		%						
	%		%						
	%		%						
	%		%						
Total 合計	100 %	Total 合計	100 %						
只適用於所認購之投資選項的相關基金額 Do you have investment knowledge and exp choice(s) etc.)?		金。 e.g. prior experience in trading derivative funds o	or in selecting derivative funds as underlying investment						
Premium Payment for Alpha and Matrix a 為遵守監管機構要求,如申請於傲富投資聲明書。  2. If you do not specify the Payment Allocat 如關下未有於上表註明金額分配百分比;  3. For currency exchange, the currency exch www.manulife.com.hk. 如涉及貨幣兑換,本公司將不時提供有關  4. In any event of conflicting instructions be and to determine the investment / premiu 如申請表與臨時收據/銀行存款單(如適.	ents, please complete and return the Financail Needs Ana and Unscheduled Premium for additional investment purpo 理財計劃及邁駿投資理財計劃繳付的額外投資保費及支付部 ion Percentage above, the payment will be allocated based 有關金額將會按照宏利已接納的最新可適用投資/保費分商 ange rate will be provided by the Company from time to ti 貨幣的兑換率。如欲查閱最新的兑換率,請聯絡開下之保際 tween the Application Form and Temporary Receipt / Ban allocation in accordance with the Company's practice. 用)上的指示有異,宏利有權按照公司慣例不接受全部或語cted from the payment amount prior to investment.	sse. 額外保費作額外投資用途均須提交已填妥的財務需 on the latest applicable investment / premium alloo 起指示分配。 me. For the latest exchange rate, please contact yo 檢顧問或瀏覽本公司的網站 www.manulife.com.hk nk Pay-in Slip (if applicable), Manulife has the sol	要分析、風險承擔能力問卷、重要資料聲明書及投保人 cation instruction accepted by Manulife. ur Insurance Advisor or visit the Company's web site at						

T31 (08/2022) 3 of 8

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Policy No. 保單編號						

# Part 1C: Investment / Premium Allocation Instruction: For Future Investment / Payment 第1C部份:投資/保費分配指示:適用於將來的投資/繳費

#### Table 1C-1 表 1C-1

### Table 1C-2 表 1C-2

Future Investment / Premium Allocation % 將來投資/保費分配百分比
%
%
%
%
%
%
%
%
%
%
100 %

Only applicable if the corresponding underlying fund(s) of the Investment Choice(s) subscribed is / are classified as derivative fund(s) by the Securities and Futures Commission in Hong Kong. 只適用於所認購之投資選項的相關基金被香港證券及期貨事務監察委員會界定為衍生產品基金。

Do you have investment knowledge and experience in financial products with derivatives exposure (e.g. prior experience in trading derivative funds or in selecting derivative funds as underlying investment choice(s) etc.)?

你是否具有對投資於衍生工具的金融產品有相關的投資知識及經驗(例如曾買賣有衍生工具成份的基金或投資於該類相關基金的投資選項)?

100 %

Ves 是	No 4

(Please complete Part 2 if your answer is "NO".

Total 合計

如閣下的答案是"否",請填寫第二部份。)

#### Remarks on Part 1C 第1C部份註釋

1. The investment / premium allocation instruction of future investment or payment will follow the respective Total Regular Premium, Top-up Premium allocation and Planned Premium / Loan Repayment / Unscheduled Premium allocation above unless otherwise specified in any subsequent instructions. The above investment / premium allocation instruction when accepted by Manulife will override and update your investment / premium allocation instruction for future investment or payment filed with the Company. 除於其後作出另行指示外,將來的投資或繳費將分別按照上表定期總保費、額外投資保費及按期保費/償還貸款/非定期保費的投資/保費分配百分比分配。上表所示的投資/保費分配指示,一經宏利接納,將取代及更新閣下於本公司就將來的投資或繳費的有關投資/保費分配指示紀錄。

T31 (08/2022) 4 of 8

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# Part 2: Policyowner's Suitability Declaration 第二部份: 保單持有人之合適性聲明

(This part is **ONLY** applicable for the request of Switching & Investment/Premium Allocation Instruction)

(此部分只適用於轉換和投資/保費分配指示的申請)

You are advised to conduct a Risk Profile Questionnaire to assess your risk profile before investing; otherwise, we will assess your application based on your risk tolerance level as indicated in your last Risk Profile Questionnaire in our record or we may assume you have low risk tolerance level if you have not conducted any Risk Profile Questionnaire on our record.

建議閣下應於投資前填寫「風險承擔能力問卷」以評估閣下現時之風險承受程度。否則,我們會以閣下於較早前遞交的「風險承擔能力問卷」內所提供的資料評估閣下之風險承擔能力。 如閣下從未填寫「風險承擔能力問卷」,閣下之風險承擔能力將會被假定為最低。

#### Please complete this part if

- (i) The corresponding underlying fund(s) of the investment subscribed / switched in is /are classified as derivative fund(s), but you do not have any investment knowledge and / or experience in financial products with derivatives exposure (e.g. prior experience in trading investment choice(s) etc.)
- (ii) the risk level of the investment choice(s) to be subscribed / switched in is / are inconsistent with your risk tolerance level.

#### 請填妥此部份如

- (i) 所認購/轉入之投資選項的相關基金被定為衍生產品基金,而閣下對投資於衍生工具的金融產品沒有相關的投資知識及/或經驗(例如沒曾買賣相關基金的投資選項)及/或
- (ii) 將認購/或轉入投資選項與閣下的風險承受程度不相符

	,上述(i)和(ii)錯配的情況反映此等交易可能並不適合閣下,而當中涉及的額外風險可能未能符合閣下的最佳利益。閣下應於投資前填寫「風險承擔能力問卷」以評估閣下現時之風 程度。有關投資選項的風險級別詳情,請瀏覽本公司網頁或聯絡閣下的保險顧問。
u in 对 <del>4</del>	We, the policyowner, understand and agree that despite the fact that the features and/or risk level of this Investment-Linked Assurance Scheme ("ILAS") policy and/or my/our selected mix of inderlying investment choices (for example, underlying investment choices selected with derivatives exposure) may not be suitable for me/us based on my/our risk profile and knowledge (including investment knowledge in derivatives), etc. as indicated in the Risk Profile Questionnaire (if any) and as a result of which I/we may be exposed to additional associated risks, I/we confirm that it is involvent intention and desire to proceed with my/our application(s) as explained below.
S	We, the policyowner, fully understand that Manulife is required to take account of my/our stated explanation for assessing whether a particular Change of Regular Subscription Allocation and / or switching is / are suitable for me/us. I/we understand that, subject to my/our explanation, Manulife may accept or reject my/our application.  上人一音等(保單持有人)完全明白,宏利須就本人一音等(保單持有人)列明的原因,評估此更改定期認購分配及一或轉換申請是否適合本人一音等(保單持有人);本人一音等因的不可能接受或拒絕本人一音等的申請。
L	(Policyowner must complete explanation in this box. 保單持有人必須於此欄內提供原因。)

T31 (08/2022) 5 of 8

Policy No. 保單編號						

To comply with the industry gudelines, please attach copy of policyowner's valid HKID card / Passport for policy loan, withdrawal or surrender (Part 3, Part 4 and Part 5). For business entity, please also attach copies of Business Registration Certificate and other relevant identification documents. Please state the policy number(s) on the attached copies. 為遵守保險業務守則,如申請保單貸款、提取金額或退保(第三部份、第四部份及第五部份),請附上保單持有人之有效的香港身份證/護照副本;商業實體則另須附上商業登記證及其他有關身份證明文件副本。請於該副本上註明保單編號。

# Part 3: Policy Loan 第三部份:保單貸款 (please also complete "Section B: Payment Instructions" 請同時填寫「第二項:付款指示」)

Redemption Methods 贖回方法 (Please "✔" one only 請只剔選其一)

- □ Maximum available loan 最高可動用貸款金額
- □ Redeem below amount from Account Values on pro-rata basis based on existing investment allocation 以按比例形式從現時帳戶淨值中贖回下列金額

Amount 金額: □ USD 美元 □ HKD 港元 \$

□ Redeem by specifying percentage of total units held <u>OR</u> number of units <u>OR</u> amount for each investment choice in <u>below Table</u> 於下表註明欲贖回單位總值百分比或單位數量或各投資選項之金額

Code 編號	% of total units O 單位總值百分比 I	  R Amount 金額 	OR 或	Number of Units 單位數量
	%			Units
	%			Units
	%			Units
Total 合計		\$		Units

#### Remarks on Part 3 第三部份註釋

- 1. Policy loan is only applicable to MIP, FIP, VIP+ and Manugift. 保單貸款只適用於「宏利精選投資保」、「靈活投資寶」、「萬利保障計劃」及「宏寶」。
- 2. If the loan amount exceeds the Maximum available loan, only the maximum available amount will be redeemed. 如貸款金額超過最高可動用貸款,本公司將只會贖回最高可動用金額。
- 3. The requested sum of the loan is subject to the maximum available net account value of the policy and the loan amount requested will be effective as soon as the Company considers applicable. 可申請貸款之金額以該保單之最高可動用的保單淨帳戶價值為限,而本公司將依據最快可行之日期作為申請貸款金額之生效日。
- 4. Please note the risk of policy lapsation / termination arising from policy loan. Loan handling charge (applicable to ManuGift and Variable Investment Protector) / loan transfer charge (applicable to Flexible Investment Protector) / policy loan charge (applicable to ManuSelect Investment Protector) (if any) as part of the monthly deduction, will be deducted from the policy value. The policy will terminate if the policy value is insufficient to cover the monthly deduction. For detailed terms and conditions of loans and policy termination, please refer to policy provisions. 請注意保單貸款所產生的保單失效終止的風險。有關貸款手續費沒要及為利保障計劃 適用) / 侵款行政費優活投資賣適用) / 保單貸款費用(宏利精選投資保適用)(如有),作為其中一項保單月費,將每月從保單價值中扣除。若保單價值不足以繳交保單月費,保單便告終止。有關貸款及保單終止詳細之條款及細則,請參閱保單條款。
- 5. You have the right to request for the information on the latest loan balance under the policy. Please contact us if needed. 您有權利向本公司取得最新保單貸款金額的資料。如有需要,您可聯絡本公司。

## Part 4: Withdrawal 第四部份:提取金額 (please also complete "Section B: Payment Instructions" 請同時填寫「第二項:付款指示」)

Remarks on Part 4 第四部份註釋

- 1. If withdrawal amount exceeds available balance, only maximum available balance will be redeemed. 如提取金額超過可動用結餘,本公司將只會贖回最高可動用結餘。
- 2. For Alpha / Alpha Regular Investor Initial Account withdrawal is **not** allowed. 如屬「傲富投資理財計劃/傲峰定期投資計劃一初期帳戶」,**不可**提取金額。For Matrix Base Savings Account Withdrawal 適駿投資理財計劃基本儲帳戶之提取:
- 3. Free Withdrawal option (Only offered to Plan B and Plan C of Matrix) is available from designation Policy Year. With this option, the capital gain from the Base Savins Account can be taken out without incurring any Early Redemption Fee. 於指定保單周年開始,適駿投資理財計劃 (只限於計劃B及計劃C) 可享有免贖回費之提取。所提取的基金回報無須繳付提早贖回費。
- 4. Any withdrawal amount that exceeds the free withdrawal amount available at the time of withdrawal is subject to Early Redempiton Fee. 如提取款項超過提取時可獲免贖回費的限額,超出限額的提款須要繳付贖回費
- 5. Premium Shortfall Charge will also be incurred if the Net Premium Paid of Base Saving Account (including the amount transferred from Privilege Top-up Account miuns aggregate withdrawal amount that exceeds the free with drawal amount at the time of withdrawal) is less than the Total Regular Premiumdue. Please refer to Principal Brochure for details. 如基本儲蓄帳戶內淨已繳保費 (包括從尊尚投資帳戶過戶之金額,減去每次從基本儲蓄戶提取時超出當時免贖回費之提取限額的金額之累積總額,少於欠繳定期總保費金額,會同時徵收欠繳保費手續費。詳情參閱產品銷售説明書。

Withdrawal for Alpha / Alpha Regular Investor -Accumulation Account, Matrix-Base Savings Account, MIP, FIP, VIP + and Manugift 提取金額(適用於「做富投資理財計劃/做峰定期投資計劃:累積帳戶」、「邁駿投資理財計劃:基本儲蓄帳戶」、「宏利精選投資保」、「靈活投資寶」、「萬利保障計劃」及「宏寶」)

Redemption Methods 贖回方法 (Please "✔" one only 請只剔選其一)

□ Redeem below amount from Account Values on pro-rate basis based on exising investment allocation 以按比例形式從現時帳戶淨值中贖回下列金額

Amount 金額: □ USD 美元 □ HKD 港元 \$\_\_\_\_\_

Redeem by specifying percentage of total units held <u>OR</u> number of units <u>OR</u> amount for each investment choice in <u>below table</u>

於下表註明欲贖回單位總值百分比或單位數量或各投資選項之金額

Code 編號	% of total units <b>O</b> 單位總值百分比 頭	R Amount <b>&amp;</b> 金額	OR 或	Number of Units 單位數量
	%			Units
Total 合計		\$		Units

Withdrawal for Alpha/Matrix - Privilege Top-up Account 提取金額 (適用於「傲富投資理財計劃/邁駿投資理財計劃:尊尚投資帳 戶」)

Redemption Method 贖回方法

Redeem by specifying percentage of total units held <u>OR</u> number of units <u>OR</u> amount for each investment choice in **below table** 

於下表註明欲贖回單位總值百分比或單位數量或各投資選項之金額

Code 編號	% of total units <b>O</b> 單位總值百分比 ፱	OR 或	Number of Units 單位數量
	%		Units
Total 合計		\$	Units

T31 (08/2022) 6 of 8

	Policy No. 保單編號							
Part 5: Full Surrender 第五部份:全數退保 (please also complete	"Section B: Payment Instructions" if applicable 請	同時填寫「第二項:付款指示」,如適用)						
☐ I, the policyowner, hereby fully surrender the above policy and request for disbursement redemption fee (if any) may be levied as appropriate.		1						
本人(保單持有人),現將上述保單至數退保及要求根據以下付款指示退回退係 SECTION B: PAYMENT INSTRUCTIONS	呆價值(如有)。本人明白貴公司可收取有關退保手約	賣費/提早贖回費(如適用)。						
第二項:付款指示 e-Payout is only applicable to policyowner's bank account, except joint account. 電子支								
Default e-Payout Method will be applied (if any) if no option is specified or the specified option is	is invalid 如未有指明或所選擇的付款方法無法被使用,預							
For withdrawal instruction(s), please complete this section. 若申請提取金額, By e-Payout 電子支付:								
la Default e-Payout Method (i.e. last channel for receiving claims payment or policy payment through FPS/Direct Credit. If this option is selected without prior default arrangement we will pay according to option b(i) below (if applicable). Otherwise, cheque will be issued.)  預設電子提取付款方法(即上一次經轉數快或直接存入銀行帳戶以收取理賠金額或保單款項之渠道。如選擇此選項但未有預先設立提取安排,將根據下列b(i) 選項處理付款(如適用)。否則將以支票形式支付。)  OR below specified e-Payout Method (will be set as default arrangement) 或以下指定電子提取付款方法(將被設置為預設付款方式):								
□ b Direct Credit to one of my following bank accounts (up to HKD300,000/US	••••••							
(i) Current autopay bank account in HKD currency for payment of premiu	ım and levy 現時繳付保費及徵費之港元自動轉帳釒	<b>最行帳戶</b>						
<ul><li>□ (ii) Bank account specified below 以下指定的銀行帳戶:</li><li>1. Name of account holder 帳戶持有人姓名:</li></ul>								
1. Name of account holder 帳戶持有入姓名。								
□ HKD Bank Account 港元銀行帳戶								
Bank Name 銀行名稱:	s c 、 t 7 次 口 5 7 去 二 口 68 7							
□ USD Bank Account (only applicable for USD Policy) 美元銀行帳 Bank Name 銀行名稱: <b>THE HONGKONG AND SHANGI</b>		·滙豐銀行有限公司						
3. Bank No. Branch No. Bank Account No. 銀行編號 分行編號 銀行帳戶號碼	1	(IE 32.00) (4 1410) PT V						
Please provide account proof (e.g. bank statement or bank book c	copy showing the name of account holder and accou	int number)						
請提供帳戶資料證明(如列有帳戶持有人之姓名及帳戶號碼。								
□ c FPS to my default receiving account (in HKD only, up to HKD1,000,000) 剩 Hong Kong Mobile Phone Number 香港手提電話號碼:	專數快至本人預設的收款帳戶(只帐港兀,限復行	港元1,000,000)						
1 ( 852 )								
Others: Country / Region Code & Mobile Phone Number 其他: 國家 / 區域								
()								
Remarks 備註:  - The above specified Faster Payment System (FPS) mobile phone number is for FPS pa	syment only and will not be updated to your contact infor	mation in our record. 上述指定之手提電話號碼只用						
於轉數快轉賬,並不會用作更新您於我們紀錄內的聯絡資料。 - For payout through FPS, only applicable to payment with maximum daily transaction								
equivalent), or the instruction cannot be executed, it will be issued by cheque. 經 1,000,000 (或等值),或無法執行有關付款指示,總額將以支票形式支付。	<b>經轉數快之付款,每份保單每日最高存款交易不能起</b>	超逾港元1,000,000 (或等值)。如交易金額超逾港元						
- For payout through Direct Credit, only applicable to payment with maximum HKD300,000/USD37,500, or the instruction cannot be executed, it will be issued by	cheque. 經直接存入銀行帳戶之付款,每份保單每日晶	)/USD37,500 per policy. If payment is exceeding 長高存款交易不能超適港元300,000 / 美元37,500。						
如交易金額超逾港元300,000 / 美元37,500 , 或無法執行有關付款指示,總額將1 - The above instruction will replace the existing default e-Payout method (if any). 以上指	<b>旨示將取代現有之電子預設付款指示(如有)。</b>							
- If there is no default e-Payout method set in our record, it will be issued by cheque. 如未□ For <b>ALL policies</b> - Paid by Cheque in <b>Hong Kong Dollar</b> 適用於所有保單 - 以港		· •						
□ For USD policy - Paid by Cheque in policy currency(b) (drawn in Hong Kong) 適用店□ For USD policy only - Paid by Cheque in USD(b) (drawn in United States) 只適用於言	於美元保單 - 以保單貨幣支票支付(b) (由香港的銀行	付款)						
Cheque collection method支票交付方式	ALIMET PARAMAN (PARAMANNA)							
□ Through my Insurance Advisor 經由本人的保險顧問轉交 □ By mail to my latest correspondence address with Manulife 寄往本人於宏利紀錄的		(						
□ By registered mail to my latest correspondence address with Manulife (only applicabl 人於宏利紀錄的最新通訊地址(只適用於支票金額為港元1,000,000或以上或		or equivalent in other currency.) (c) 以掛號方式寄任本						
Notes 註  (a) In general, it takes a longer settlement period to clear a foreign cheque in Hong K	Vone Donk shareas may be incurred by client for clear	ing the abeaus						
(a) in general, it takes a longer settlement period to clear a tolergic circle in rong 銀行通常需要較長的結算時間由香港兑現外幣支票;另銀行或會向客戶徵4 (b) The HKD equivalent will be based on the currency exchange rate provided by the	收兑現支票的相關手續費。	- '						
相等之港元將會以支票發出時的貨幣兑換率計算,而本公司將不時提供有售 (c) If the payment cheque amount is less than HKD 1,000,000 or equivalent in other	關的貨幣兑換率。	The changed from time to time.						
如支票金額少於港元1,000,000或相等的其他貨幣,支票會以普通郵寄方式	寄出。							
□ Transfer to my other Manulife's policy (fill in where applicable) 轉移至本	:人的其他宏利保單(如適用請填寫) 							
To Policy no. 至保單編號								
Amount 金額 USD 美元	□ USD 美元	□ USD 美元						
□ HKD港元 \$	□ HKD港元\$	□ HKD港元\$						

繳付保費及/或徵費

□ Loan Repayment 償還貸款
□ Other 其他 \_\_\_\_\_

繳付保費及/或徵費

□ Other 其他 \_

□ Loan Repayment 償還貸款

□ Other 其他 \_

SECTION C: SPECIAL REQUEST 第三項: 特別指示

Purpose 用途

T31 (08/2022) 7 of 8

繳付保費及/或徵費

□ Loan Repayment 償還貸款

	Policy No. [ 保單編號 ]					
SECTION D : COLLECTION OF LEVY ON INSURANCE PREMIUM(S) BY THE INSURANCE AUTHORI	TY ("IA") 第	四項:	保險業監管	局(『保監局	」)所收	取的保費徵費
I/We, the policyowner, hereby acknowledge, agree and confirm the following in relation to my obligations to pay a propursuant to section 134 of the Insurance Ordinance (Cap. 41) the Insurance (Levy) Regulaion and the Insurance (Levy) Ork條例》(第41章第134條、《保險業(徵費)規例》及《保險業(徵費)令》,有關本人/吾等有責任於每次根據保單繳付货	escribed levy of der. 本人/吾寺 保費時需同時網	on each p (作為保 激付訂明	premium pay 單持有人)知 微費(「微費	ment made u I悉、同意及 ·」) 的以下名	nderthe p t確認, 項:	oolicy (''Levy'') 根據《保險業

1. The policyowner shall, each time a premium is paid, pay Levy to the IA, via the Company, the amount of which is subject to the rate and cap as prescribed by the Insurance (Levy) Order. 保單持有人需要於每次繳付保費時,透過本公司繳付徵費予保監局,其金額乃根據《保險業(徵費)令》所訂明的徵費率及徵費上限而計算。

A failure to pay Levy by the policyowner when a premium is paid is a contravention of the Insurance (Levy) Regulation. The IA may recover the outstanding Levy as a civil debt due to the IA and impose a pecuniary penalty at a rate as from time to time prescribed under the Insurance (Levy) Regulation against the policyowner. 如保單持有人沒有於繳交保費時繳付徵費,保單持有人將會被視作違反《保險業/徵費)規例》。保監局有權以民事債項為基礎追收未繳付的徵費,以及根據由《保險業/徵費)規例》 不時訂明的費率,對保單持有人施加罰款。

In the event of default for payment of Levy, The Compan may, at its discretion and/or as reasonably required by the IA, provide the particulars of the policyowner to the IA. 對於拖欠繳付徵費的情況,本公司可酌情決定及/或根據保監局合理的要求,提供保單持有人的詳情予保監局。

The Company shall collect Levy from the policyowner along with the payment of the corresponding premium. Unless specified otherwise, where the premium is settled according to the terms of the policy and/or the instruction of the policowner through, including without limitation, direct debit from an account specified by the policyowner, deduction from premium dump-in facility, accumulated dividends and/or other entitlements available to the policyowner, automatic premium loan and/or other automatic premium payment oftions, the Levy corresponding to the premium so collected shall be collected at the same time and in the same manner. 本公司將於保單持有人繳付保費時一併收取相應徵費。除非另有註明,否則,當保費以根據保單條款及或保單持有人所指示的方式繳付時,包括但不限於從保單持有人指定的直

接付款帳戶扣繳、從保單注入款項、累計紅利及或保單持有人的其他適用權益扣除、以自動貸款代繳保費及或其他自動繳交保費方式,則本公司將於同一時間及以相同方式收取 該筆保費的相應徵費。

Any outstanding of Levy shall be treated as an indebtedness to the Company and the Company may first deduct the amount of outstanding Levy as indebtedness from the benefits and/or entitlements (including without limitation the cash value, dividend and/or death proceeds of the policy) otherwise available to the policyowner, assignee of beneficiary, if any, pursuant to the policy, as the case may be. 任何欠缴的徵費會被本公司視為負債。當本公司提供保障及成權益予保單持有人、受讓人或受益人時,包括但不限於保單的現金價值、紅利及成死亡賠償如適用及根據保單及情 况而定),可先從金額中扣除被視為負債的欠繳徵費。

The premium and levy can be paid in other currency as acceptable by the Company, by using the prevailing exchange rate as determined by the Company which may change from time to time. Under such circumstances, the policyowner may be subject to exchange rate fluctuation risk. 保費及徵費可以本公司所容許的其他貨幣支付,惟需根據當時適用的兑換率計算,而兑換率是由本公司釐定並可不時作出修訂。在這情況下,保單持有人可能需承受匯率風險。

The above confirmation shall bind my/our successors, assignees and/or beneficiaries. This confirmation shall remain valid notwithstanding my/our death or incapacity. 本人吾等之繼承人、受讓人及感受益人亦受此確認書約束。即使本人吾等死亡或喪失行為能力,此確認書仍然存有法律效力。

[Note: For more details on Levy and its arrangement, please visit our website www.manulife.com.hk]

[註:有關更多徵費的詳情及安排,請參閱宏利網站www.manulife.com.hk。]

# SECTION E: DECLARATION AND AUTHORIZATION 第五項: 聲明及授權

I, the policyowner, hereby agree to the application as stated above and understand that the above application is bound by the provisions stated in the Contract. For the case of surrender, I hereby agree to surrender the above policy for its values, if any. I understand that surrender charges may be levied as appropriate and that the above application is bound by the Surrender and Withdrawals provisions as stated in the Contract. I further confirm that the request is made at my own volition and at my own risk after reading and understanding all relevant information relating to the policy. I shall make my own independent decisions/judgements in respect of premium allocation/subscription, redemption, switching or any other matters relating to my selected investment choice(s) and my policy. I confirm and fully understand/an aware of the associated risk and return of the investment choice(s) chosen by me, which may or may not be suitable for me. I declare that I do not have any bankruptcy petition made against me. Iunderstand that all payments and benefits of the policy will not be payable by Manulife if the identification of the relevant parties does not completely follow the Company's guidelines and instructions provided in this application. 本人(保單持有人)同意以上之申請及明白上述申請受保單合約內之條款約束。如屬退保之申請事宜,本人同意將以上保單退保以提取價值。 本人明白宏利人壽保險(國際)有限公司可收取有關退保手續費,亦明白上述之退保申請受保單合約內之退保及提款條款約束。本人於細閱及明白所有相 關保單資料後,確認此要求乃本人的意願,願意承擔所有風險。本人就保費分配/認購、贖回、調配或其他本人所選擇的投資選項及保單之事項作獨立決定/判斷。本人確認及充份理解/認識本人所選擇的投資選項所附帶之風險及潛在回報,而該風險可適合或不適合本人。本人聲明本人現時並沒 有破產。本人明白倘相關人士之身份證明資料未能完全符合宏利於此申請上提供的指引及規定,宏利將不會根據保單作出任何付款及賠償。

All information in this application form together with any subsequent alterations or supplements of it are collected to enable the Company to carry on insurance business and may be transferred to and/or used by the Company (including its subsidiaries, affiliated companies and associated companies, whether they are located or registered in Hong Kong or outside Hong Kong) and any service providers (whether they are located or registered in Hong Kong or outside Hong Kong) for the purpose of approving and underwriting this application, administering and reinsuring the policy, preventing money laundering and/or terrorist financing activities, and/or adjudicating any insurance or related claims thereof. My data may be transferred to any relevant regulatory bodies to enable them to carry out their regulatory functions. I/We have received and read the Notice to Customers relating to the Personal Data (Privacy) Ordinance (version 20130401-01) ("Notice"). I/We understand and agree to the Notice. 本申請表所提供之所有資料與任何日後作出之修訂或補充,目的在於確保貴公司之保險業務得以順利運 作,而該等資料可供貴公司(包括其附屬公司、關聯公司及聯繫公司,不論其位於或註冊於香港或香港境外)及任何服務供應商(不論其位於或註冊於香港或香港境外)轉移及/或用以批核此申請、管理此保單並安排分保、防止洗黑錢及/或恐怖分子融資活動及/或處理有關之保險或索償申請。本人 之資料可轉移予相關機構以執行監管職權。本人/吾等已收訖及閱畢《有關〈個人資料(私隱)條例〉的客戶通知(20130401-01版本)》(「通知」)。本人/吾 等清楚明白及同意該通知之內容。

Signed on this		day of		_ ,
簽署日期:	Day 日	Month 月		Year 年
X			X	
Signature(s) of irrev	ocable beneficiary(ies	s) (if applicable) 不可更改之受益人簽署(如適用	Signature of co	ollateral assignee (if applicable) 附屬抵押轉讓受讓人簽署(如適用)
V			v	
X			_ X	Partition of the Marian
Signature of witnes	s 見證人簽署		Signature of p	oolicyowner 保單持有人簽署
(Name 姓名:			)	

T31 (08/2022) <For office use only - signature(s) verified \_\_\_\_</pre> 

Please return the completed form to Individual Financial Products, Manulife (International) Limited, 22/F., Manulife Financial Centre, 223-231 Wai Yip Street, Kwun Tong, Kowloon, Hong Kong. 請將填妥的表格寄回香港丸龍觀塘偉業街223-231號宏利金融中心22樓宏利人壽保險(國際)有限公司個人理財產品業務部。