

## DEED OF ABSOLUTE ASSIGNMENT

**This form is only applicable for Manulife Investment Solutions/Manulife Investment Plus.**

**Please complete the English version of this form. The Chinese translation printed overleaf is for your reference only.**

請填寫本表格的英文版本; 背頁之中文譯本只供參考之用。

Policy no. \_\_\_\_\_

Full name of policyowner \_\_\_\_\_

Full name of insured \_\_\_\_\_ (Fill in only if different from policyowner)

**ABSOLUTE ASSIGNMENT**

The policyowner ("assignor") hereby transfers and assigns absolutely all rights and interests under the above policy to the new policyowner as stated in Part A and revokes any beneficiary designation previously made in respect of the proceeds ("death proceeds") payable upon the death of the life Insured and directs that such proceeds be paid to the new policyowner unless otherwise specified in Part B for new beneficiary designation.

**PART A : DETAILS OF NEW POLICYOWNER**

	NEW FIRST POLICYOWNER	NEW SECOND POLICYOWNER (Only applicable to Joint Policyowner)
1. Name (as shown on Identity card/Passport/PRC ID Card/Business Registration)	In English Surname _____   Given name & Middle name(s) _____ In Chinese _____	In English Surname _____   Given name & Middle name(s) _____ In Chinese _____
2. Sex	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Female
3a. Date of birth	DD   MM   YYYY	DD   MM   YYYY
3b. Place of birth	City _____   Country _____	City _____   Country _____
4. Identity card/Passport /PRC ID no./Business Registration no.	(Please refer to remark at page 3)	(Please refer to remark at page 3)
5. Nationality		
6. Relationship to first Insured		
7. Relationship to second Insured (if any)		
8a. Occupation		
8b. Business nature		
8c. Details of job		
8d. Are you owner or senior management of your employed company?	<input type="checkbox"/> Yes, please specify your position _____ <input type="checkbox"/> No	<input type="checkbox"/> Yes, please specify your position _____ <input type="checkbox"/> No
9. Current residence address	Room/Flat _____   Floor _____   Block _____ Name of estate/village/building _____ No. and name of street/road _____ Name of area/district/postal code _____ City _____ Country _____	Room/Flat _____   Floor _____   Block _____ Name of estate/village/building _____ No. and name of street/road _____ Name of area/district/postal code _____ City _____ Country _____
10. Contact information of new first policyowner (must be completed)	Permanent residence address (same as current residence address unless otherwise specified) (City : _____) (Country : _____) Correspondence address (please select one of the following) ^+ (not applicable for Addition of Joint Policyowner): <input type="checkbox"/> same address as new policyowner's residence <input type="checkbox"/> as specified below. _____ (Country : _____) E-mail address^: _____ <input type="checkbox"/> I do not have an email address. <input type="checkbox"/> Apply e-Statement Service# Contact number^: _____ (Country Name : _____) Language Preference^ (Only for applicable communications/materials) <input type="checkbox"/> Chinese <input type="checkbox"/> English For business entity, all correspondences shall be directed with attention to : _____ Name _____ Department / Section _____	
Applicable to Joint Policyowner Only	<input type="checkbox"/> We authorize Manulife (International) Limited and its Insurance Advisors to act upon instructions signed by any one of the Policyowners in respect of subscription, redemption, switching or any other matters (except the transfer and variation of the policy) relating to our selected investment choices and our policy.	
Source(s) of wealth / funds for premium payment (it is only applicable for the policyowner with Regular Subscription, please tick one or more) <input type="checkbox"/> Savings <input type="checkbox"/> Wages income <input type="checkbox"/> Self-employment income <input type="checkbox"/> Investment income <input type="checkbox"/> Sale of an asset <input type="checkbox"/> Gift or inheritance <input type="checkbox"/> Settlement of insurance <input type="checkbox"/> Others (Please specify) _____		

**PART A : DETAILS OF NEW POLICYOWNER (CONTINUED)**

	<b>NEW FIRST POLICYOWNER</b>	<b>NEW SECOND POLICYOWNER (Only applicable to Joint Policyowner)</b>
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Tax law and regulations (including but not limited to the U.S. Foreign Account Tax Compliance Act (FATCA) and regulations based on the Organisation for Economic Co-operation and Development (OECD) Common Reporting Standard (CRS) for automatic exchange of information) require Manulife to collect and report information about tax residency. In certain circumstances, Manulife may be obliged to provide certain information to governments, regulators and tax authorities concerning your tax residency and other tax-relevant data.

As a financial institution, Manulife is not allowed to give tax or legal advice. If you have any questions regarding your tax residency, please consult your tax adviser or the information for FATCA and CRS at the following links at <https://www.irs.gov/> and <http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/> respectively.

<p>11a. Are you a United States person, being a U.S. citizen, U.S. resident for U.S. federal income tax purposes or U.S. Resident Alien (i.e. a so-called U.S. Green Card holder)? <sup>Δ</sup></p>	<p><input type="checkbox"/> Yes (Please provide your consent to report and U.S. TIN. by submitting the prescribed form/ substitute Form W-9 as requested by Manulife)</p> <p><input type="checkbox"/> No</p>	<p><input type="checkbox"/> Yes (Please provide your consent to report and U.S. TIN. by submitting the prescribed form/ substitute Form W-9 as requested by Manulife)</p> <p><input type="checkbox"/> No</p>
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11b. Please list all countries / jurisdictions (including Macao) where you are a resident for tax purposes and Taxpayer Identification Number or its Functional Equivalent (TIN) for each country / jurisdiction. If more than 5 countries / jurisdictions, use a separate sheet. Please refer tax residency to OECD websites: <http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/#d.en.347760> <sup>Δ</sup>

**FOR NEW FIRST POLICYOWNER**

Country/Jurisdiction of Tax Residency	Taxpayer Identification Number or its Functional Equivalent (TIN)	Name associated with TIN		If no TIN is available, enter Reason A, B or C
		Surname	Given name & middle name(s)	
1				
2				
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**FOR NEW SECOND POLICYOWNER (only applicable to Joint Policyowner)**

Country/Jurisdiction of Tax Residency	Taxpayer Identification Number or its Functional Equivalent (TIN)	Name associated with TIN		If no TIN is available, enter Reason A, B or C
		Surname	Given name & middle name(s)	
1				
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**Reason A** - The country/jurisdiction where the account holder is a resident for tax purposes does not issue TINs to its residents.  
**Reason B** - The account holder is unable to obtain a TIN (Please explain why you are unable to obtain a TIN in the below table if you have selected this reason.)  
**Reason C** - No TIN is required. (Note : Only select this reason if the domestic law of the relevant jurisdiction of residence does not require the TIN to be disclosed.)

Please explain in the following box why you are unable to obtain a TIN if you selected Reason B above.

**FOR NEW FIRST POLICYOWNER**

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**FOR NEW SECOND POLICYOWNER (only applicable to Joint Policyowner)**

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**PART A : DETAILS OF NEW POLICYOWNER (CONTINUED)**

Important Notes for self-certification in 11b. above:

- This is a self-certification provided by you to Manulife for the purpose of automatic exchange of financial account information. The data collected may be transmitted by Manulife to the Financial Services Bureau and/or regulators in Macao Special Administrative Region for transfer to the tax authority of another jurisdiction, and/or directly to the tax authority of another jurisdiction.

**Declaration and Acknowledgement: By signing on this form,**

I/We declare that the information given and all statements made in this self-certification (which includes any separate sheet(s)) are, to the best of my/our knowledge and belief, true, correct and complete.

I/We understand that the information supplied by me/us is covered by the full provisions of the terms and conditions governing the account holder's relationship with Manulife setting out how Manulife may use and share the information supplied by me/us.

I/We undertake to advise Manulife of any change in circumstances which affects the tax residency status of the individual identified in this self-certification or causes the information contained herein to become incorrect or incomplete, and to provide Manulife with a suitably updated self-certification within 30 days of such change in circumstances.

I/We acknowledge and agree that (a) the information contained in this self-certification is collected and may be kept by Manulife for the purpose of automatic exchange of financial information and (b) such information and information regarding the account holder and any reportable account(s) may be reported by Manulife to the Financial Services Bureau of (and/or regulators in) the Macao Special Administrative Region and exchanged with the tax authorities of another country/countries and jurisdiction(s) in which the account holder may be resident for tax purposes, pursuant to the legal provisions for exchange of financial account information.

**Paragraph number 11a & 11b of the certification applies to policyowners (i.e. policy applicants) who are individuals only. Entities, who are not individuals, should submit a self-certification required by Manulife for Entity.**

Δ Answer to this question is mandatory except as otherwise instructed by Manulife. Answer to this question is not required for new policyowner being entities, who are not individuals, should submit a certification or another prescribed form required by Manulife.

^ The contact information (including language preference) applies to all of your products/services in Hong Kong and Macau provided by all companies within the Manulife group of companies and also companies which provide trustee/custodian services. If you are a member of any provident fund scheme(s) administered by Manulife, any information provided here will (unless otherwise stated below) be treated as an instruction to register the selected address as registered residential address under scheme(s). Any residential address(es) previously registered under the scheme(s) will be superseded accordingly.

# E-Statement Service allows you to receive statements electronically by login to our website [www.manulife.com.hk](http://www.manulife.com.hk), and respective paper statements will not be mailed by postage. Please visit our website for the types of e-Statement available and their retention period

+  **To apply the selected correspondence address to this policy only, please put a "✓" in the box.**

Remark:

**For Individual new policyowner**, the following information are required:

1. Certified copy of Identity card/passport of the new policyowner
2. Address proof (copy of the bank statement/utility bills in last 3 months)

**For Corporation new policyowner**, please complete Business Insurance Questionnaire and submit the supporting documents listed in the questionnaire. Manulife shall have the right to update above requirement from time to time and to accept or reject the form submitted by you if you fail to fulfill the Company's requirements.

**For policy that holds any notional units of Manulife Inv China A Fund and/ or Manulife Inv China Bond Fund:**

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.

1. Proof of permanent residency is required if any notional units of Manulife Inv China A Fund and/ or Manulife Inv China Bond Fund are held under the policy.
2. Please ensure that new policyowner(s) who are Mainland China Person(s) should not hold any notional units of the Manulife Inv China A Fund and/ or Manulife Inv China Bond Fund.

**PART B : BENEFICIARY DESIGNATION**

Primary	Secondary	Name of beneficiary	Relationship to first life insured	Relationship to second life insured	Beneficiary ID/ Passport no.	Share (%)	Name of Trustee (if any)	Relationship to beneficiary	Trustee ID/ Passport no.
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

NOTE: The policyowner/new policyowner hereby declare(s) that any trustee designated in the above table shall be appointed as the trustee to receive any death proceeds under the policy for the beneficiary named on and in accordance with the percentage proportion as shown in the same row before such beneficiary attains the age of 18. Any reference to "estate", "owner's estate" or "insured's estate" in the beneficiary column for any policy with joint policyowner shall be regarded as the estate of the last surviving insured.

**DECLARATION & AUTHORIZATION**

The contractual parties agree that: (1) the person(s) for whose use or benefit or on whose account the insurance policy is being applied for and to be entered into have an insurable interest in the said policy and their name(s) have already been inserted into this form or their class/description have already been specified in this form with sufficient particularity to make it possible to establish their identities; (2) supply of personal information under this form is a condition precedent for Manulife to endorse this transfer and variation; (3) this form shall represent the parties' agreement and Manulife be authorized to rely on this as the entire instruction; (4) the parties are required to update Manulife immediately on any changes of the personal information provided in this form; (5) the parties are required to inform Manulife immediately in writing of any change in (a) any personal information provided on this application form; (b) the personal particulars of any of the persons mentioned in this application; and/or (c) the other information provided by the parties in this application form or any other documents, including but not limited to any change of the person(s) who has/have any legal or beneficial interest in the policy directly or indirectly.

The New Policyowner certify that information supplied in this form is true and accurate.

**PERSONAL INFORMATION COLLECTION STATEMENT**

I/We have received and read the "Manulife Personal Information Collection Statement (version 20150119\_M) ("Statement"). **I/We understand and consent to the usage, transfer and processing of data (including personal data) as described in the Statement.** I/We confirm my/our consent as referred to in the sections entitled **Use of Personal Data in Direct Marketing** and **Provision of Personal Data for Use in Direct Marketing** of the Statement subject to any objection as indicated by me/us below: (*IMPORTANT NOTES: Please note that direct marketing can include offers of special discounts, coupons or gift items. You can leave these boxes blank.*)

- I/We object to Manulife using my/our personal data in direct marketing as referred to in the section entitled **Use of Personal Data in Direct Marketing** of the Statement.
- I/We object to Manulife providing my/our personal data to Manulife Group (other than Manulife itself) for use in direct marketing as referred to in the section entitled **Provision of Personal Data for Use in Direct Marketing** of the Statement.

**Only applicable to policy that holds any notional units of Manulife Inv China A Fund and/ or Manulife Inv China Bond Fund:**

**Definition of Mainland China Person:**

- (i) Chinese citizens resident in the People's Republic of China (excluding Hong Kong, Macau and Taiwan)(the "Mainland China");
- (ii) Chinese citizens resident outside the Mainland China who are not permanent residents of another country or Hong Kong, Macau or Taiwan; or
- (iii) any legal person, corporation, partnership, or other entity registered, incorporated or established in the Mainland China.

- I/We, the new policyowner(s), am/are **not** Mainland China Person(s), and am/are enclosing a copy of my/our non-Mainland China identity/incorporation certificate.
- I/We, the new policyowner(s), am/are **not** Mainland China Person(s), am/are citizens of Mainland China (excluding Hong Kong, Macau and Taiwan), but am/are residing outside of the Mainland China with permanent residency in the jurisdiction as specified below, and am/are enclosing a copy of my/our identity and/or proof of permanent residency.

Please specify \_\_\_\_\_

Dated this the \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_  
Month Year

Signature of Witness to all the signatories      X (Name: _____)	Signature of New First Policyowner (With company chop, if applicable)  X	Signature of New Second Policyowner (Only applicable to Joint Policyowner)  X
	Signature of Original First Policyowner  X	Signature of Original Second Policyowner (Only applicable to Joint Policyowner)  X
<b>For Office Use Only</b>	<input type="checkbox"/> QFII <input type="checkbox"/> Non-QFII	S.V. _____ <input type="checkbox"/> Y <input type="checkbox"/> N      S.V. _____ <input type="checkbox"/> Y <input type="checkbox"/> N

Please return the completed form to Macao Administration Office, Manulife (International) Limited, Avenida De Almeida Ribeiro No.61, Circle Square, 14 andar A, Macao.

**保單絕對轉讓契約**

此表格只適用於宏利智富錦囊/宏利投資計劃。

此中文譯本只供參考之用，若與英文有異，一概以英文為準。

保單編號 \_\_\_\_\_

保單持有人姓名 \_\_\_\_\_

受保人姓名 \_\_\_\_\_ (若非保單持有人方需填寫)

絕對轉讓		
保單持有人(「轉讓人」)現將上述保單之所有權利及利益絕對轉讓予第一部份所示之新保單持有人，同時撤銷原有收取身故賠償金額(因受保人身故)的指定受益人，並授權將賠償款項支付予新保單持有人或第二部份之指定受益人。		
第一部份：新保單持有人資料		
	新第一保單持有人	新第二保單持有人 (只適用於聯名保單持有人)
1. 姓名(身份證/護照/中國居民身份證/商業登記證所示)	英文名 姓 _____   名 _____	英文名 姓 _____   名 _____
	中文名 _____	中文名 _____
2. 性別	<input type="checkbox"/> 男 <input type="checkbox"/> 女	<input type="checkbox"/> 男 <input type="checkbox"/> 女
3a. 出生日期	日   月   年	日   月   年
3b. 出生地方	城市 _____   國家 _____	城市 _____   國家 _____
4. 身份證/護照/中國居民身份證/商業登記證號碼	(請參閱第三頁的註釋)	(請參閱第三頁的註釋)
5. 國籍		
6. 與第一受保人關係		
7. 與第二受保人(如有)關係		
8a. 職業		
8b. 業務性質		
8c. 主要工作職務		
8d. 閣下否受僱公司的擁有人或高級管理層?	<input type="checkbox"/> 是，請註明閣下的職位 _____ <input type="checkbox"/> 否	<input type="checkbox"/> 是，請註明閣下的職位 _____ <input type="checkbox"/> 否
9. 目前的住宅地址	室 _____   樓 _____   座 _____	室 _____   樓 _____   座 _____
	屋苑/屋村/大廈名稱 _____	屋苑/屋村/大廈名稱 _____
	街道名稱及號碼 _____	街道名稱及號碼 _____
	區城/地區/城市/郵寄代碼 _____	區城/地區/城市/郵寄代碼 _____
	城市 _____ 國家 _____	城市 _____ 國家 _____
10. 新第一保單持有人聯絡資料(必須填寫)	永久居住地址(除列明外，永久居住地址與目前的住宅地址相同) (城市：_____)(國家：_____)	
	通訊地址(請選擇以下其中一項)^(不適用於新增聯名保單持有人)： <input type="checkbox"/> 與新保單持有人的住宅地址相同 <input type="checkbox"/> 如下所示。 _____ (國家：_____)	
	電郵地址^：_____ <input type="checkbox"/> 本人沒有電郵地址。 <input type="checkbox"/> 申請電子結單服務*	
	聯絡電話^：_____ (國家名稱：_____)	
	語言選擇^(只限於適用的資訊/文件) <input type="checkbox"/> 中文 <input type="checkbox"/> 英文 若為商業實體，所有通訊必須送交： 姓名 _____ 部門/分科 _____	
	僅適用於聯名保單持有人 <input type="checkbox"/> 吾等授權宏利人壽保險(國際)有限公司及其保險顧問根據任何一位保單持有人簽署之指示，執行有關認購、贖回、轉換或其他吾等所選擇的投資選項及保單之事宜(保單轉移及變更則除外)。	
保費的財富/款項來源(只適用於定期認購的保單持有人，可選多於一項) <input type="checkbox"/> 儲蓄 <input type="checkbox"/> 受僱收入 <input type="checkbox"/> 自僱收入 <input type="checkbox"/> 投資收入 <input type="checkbox"/> 出售資產 <input type="checkbox"/> 饋贈或遺產 <input type="checkbox"/> 保險收入 <input type="checkbox"/> 其他(請詳述) _____		

**第一部份：新保單持有人資料 (續)**

	<b>新第一保單持有人</b>	<b>新第二保單持有人 (只適用於聯名保單持有人)</b>
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稅務法律及規例 (包括但不限於美國《海外帳戶稅收合規法案》(FATCA) 和根據自動交換資料有關的經濟合作與發展組織 (OECD) 《通用報告準則》(CRS) 的規則) 要求宏利收集及申報關於稅務居民的資料。在部分情況下, 宏利可能有義務向政府、監管機構或稅務當局提供有關閣下稅務居民及與稅務相關的資料。  
宏利不獲允許提供稅務或法律意見。若閣下對您的稅務居民身份有任何疑問, 請詢問專業稅務顧問或瀏覽 <https://www.irs.gov/> 及 <http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/> 網站FATCA及 CRS資料。

<p>11a. 閣下是否美國人士、美國公民、符合美國所得稅目的之美國居民, 或擁有美國居民身份之外僑 (即美國綠卡持有人)? <sup>Δ</sup></p>	<p><input type="checkbox"/> 是 (請提交宏利所要求的指定表格/簡易W-9表格, 以表示閣下同意申報並提供閣下的美國稅務識別號碼)。</p> <p><input type="checkbox"/> 否</p>	<p><input type="checkbox"/> 是 (請提交宏利所要求的指定表格/簡易W-9表格, 以表示閣下同意申報並提供閣下的美國稅務識別號碼)。</p> <p><input type="checkbox"/> 否</p>
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11b. 請列明閣下在當地為符合稅務目的之居民的所有國家 / 司法管轄區 (包括澳門) 以及該國家 / 司法管轄區發出的稅務編號或具有等同功能的識別編號 (TIN)。如多於5個國家 / 司法管轄區, 使用另外紙張。請參考經合組織網站的稅務居民: <http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/#d.en.347760>

**新第一保單持有人**

稅務居民所在國家 / 司法管轄區	稅務編號或具有等同功能的識別編號	稅務編號相關姓名		若無稅務編號, 填上理由A、B或C
		姓	名	
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**新第二保單持有人 (只適用於聯名保單持有人)**

稅務居民所在國家 / 司法管轄區	稅務編號或具有等同功能的識別編號	稅務編號相關姓名		若無稅務編號, 填上理由A、B或C
		姓	名	
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**理由A** — 帳戶持有人在當地為稅務居民的國家 / 司法管轄區不向其居民發出稅務編號。  
**理由B** — 帳戶持有人無法獲得稅務編號。(若您選擇這理由, 請在下表解釋閣下無法獲得稅務編號的原因。)  
**理由C** — 無需稅務編號。(註: 只有在相關司法管轄區的國內法律不需要披露該司法管轄區發出的稅務編號方可選擇這理由。)  
 若您選擇上方理由B, 請在以下方格內解釋無法獲得稅務編號的原因。

**新第一保單持有人**

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**新第二保單持有人 (只適用於聯名保單持有人)**

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**第一部份：新保單持有人資料 (續)**

有關上方11b.自我證明的重要提示：

- 這是由閣下向宏利提供的自我證明，以作自動交換財務帳戶資料用途。宏利可把收集所得的資料交給財政局及 / 或澳門特別行政區監管機構，將資料交到另一稅務管轄區的稅務當局，及 / 或直接交給另一稅務管轄區的稅務當局。

**聲明及確認：本人/ 吾等簽署本表格，**

本人/ 吾等聲明就本人/ 吾等所知所信，本自我證明 (包括使用另外紙張) 內所填報的所有資料和聲明均屬是真實、正確及完備。

本人/ 吾等明白，本人/ 吾等提供之資料受管限帳戶持有人與宏利之間關係的全部條款及條件規定所限，該等規定列明了宏利可如何使用及分享本人/ 吾等提供之資料。

本人/ 吾等承諾，如情況有所改變，以致影響本自我證明所述的個人的稅務居民身份，或引致本自我證明所載的資料不正確或不完整，本人/ 吾等會通知宏利，並會在情況發生改變後30天內，向宏利提交一份適當更新的自我證明。

本人/ 吾等確認及同意，宏利可根據有關交換財務帳戶資料的法律條文，(a)收集本自我證明所載資料並可備存作自動交換財務帳戶資料用途及(b)把該等資料和關於帳戶持有人及任何須申報帳戶的資料向澳門特別行政區政府財政局及或監管機構申報，從而把資料轉交到帳戶持有人的居留司法管轄區的稅務當局。

上述第11a及11b項證明，只適用於個人保單持有人 (即投保申請人)。個人以外之申請者，應另行提交宏利指定的**實體自我證明**。

△ 除非宏利另有指示，問題必須作答。新保單持有人屬公司而非個人申請者，應另行提交證明或宏利就公司申請所指定之核證表格。

△ 閣下所提供的聯絡資料 (包括語言選擇)，適用於閣下持有並由宏利集團旗下公司，以及為宏利集團提供信託/ 託管服務的公司於香港及澳門所提供的產品/ 服務上。如閣下是宏利管理的公積金計劃成員，於此部份填寫的資料 (除以下作出其他指示外) 將視為給予本公司的指示，要求把以上地址作為閣下於宏利公積金計劃內的登記住宅地址，並取代以往於計劃內的所有登記住宅地址。

# 透過電子結單服務，閣下可登入宏利網站 [www.manulife.com.hk](http://www.manulife.com.hk) 收取電子結單，結單將不會以郵遞寄出。請瀏覽宏利網站參閱有關電子結單類別及其保留期限。

+  如所選擇的通訊地址只適用於本保單，請在方格上填上「✓」號。

**註釋：**

如屬個人新保單持有人，須遞交以下資料：

1. 新保單持有人的香港身份證/ 護照之核實副本
2. 須遞交地址證明 (最近三個月之銀行月結單/ 公用事務帳單副本)

如屬公司新保單持有人，請填寫「商業保險問卷」，並連同所載之有關文件一併交回。

宏利有權隨時更新以上要求，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。

如保單內持有宏利智富中國A股基金及/ 或宏利智富中國債券基金之名義單位：

「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：

1. 如保單內持有宏利智富中國A股基金及/ 或宏利智富中國債券基金之名義單位，請提供永久居民證明。
2. 如新保單持有人為中國內地人士，請確保新保單持有人不可持有宏利智富中國A股基金及/ 或宏利智富中國債券基金之名義單位。

**第二部份：指定受益人**

基本	次序	受益人姓名	與第一受保人關係	與第二受保人關係	受益人身份證/ 護照號碼	分配 (百分比)	信託人姓名 (如有)	與受益人關係	信託人身份證/ 護照號碼
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>								

註：保單持有人/ 新保單持有人謹此聲明，受益人年滿十八歲前，於表內指定之信託人將被委任為以信託人身份代表受益人根據上述表內同一行所示之百分比收取身故賠償金額。任何聯名保單持有人的保單於受益人一項引用的「遺產」、「保單持有人的遺產」或「受保人的遺產」均被視為最後生存受保人之遺產。

**聲明及授權**

合約各方同意下列各項：(1)如所訂立之保險合約是為某有關人士的使用或利益，或為某有關人士申請及訂立，則某有關人士已於有關保單內擁有可保利益，而某有關人士的姓名已載於本表格內或其類別/種類已詳列於本表格內並足以確立其身份；(2)於本表格內提供之個人資料將作為批核申請轉移及變更之先決條件；(3)本表格將代表合約各方之協議，而宏利獲授權視本表格為指示之全部；(4)如本表格上所提供之個人資料有所更改，合約各方等需通知宏利有關改動；(5)合約各方茲同意 (甲) 任何人士於本申請書的個人資料及/或 (乙) 本申請書所提及任何人士的個人資料及/或 (丙) 合約各方於本申請書或任何其他文件提供的資料如有任何變動 (包括但不限於直接或間接於保單擁有任何法定或實益權益的人士有所更改)，合約各方將即時以書面通知貴公司。新保單持有人謹此證明表格上所提供的資料均真確無誤。

**個人資料收集聲明**

本人/吾等已收訖及閱畢有關《〈宏利個人資料收集聲明〉(20150119\_M版本)》(「聲明」)。本人/吾等明白及同意資料(包括個人資料)根據該聲明描述的使用、轉交及處理。除本人/吾等如下所示提出之任何反對外，本人/吾等確認同意該聲明內以個人資料在直接促銷中的使用及提供個人資料作直接促銷為標題之內容。(重要提示：請注意直接促銷用途可包括提供特別折扣、優惠券或禮品。你可將這些空格留空。)

- 本人/吾等反對宏利按該聲明內以個人資料在直接促銷中的使用為標題的部分，將本人/吾等之個人資料作直接促銷用途。
- 本人/吾等反對宏利按該聲明內以提供個人資料作直接促銷為標題的部分，向宏利集團(不包括宏利本身)提供本人/吾等之個人資料作直接促銷用途。

只適用於保單內持有宏利智富中國A股基金及/或宏利智富中國債券基金之名義單位：

**中國內地人士的定義：**

- (i) 居於中華人民共和國(不包括香港、澳門及台灣)(「中國內地」)的中國公民；
- (ii) 居於中國境外但並非其他國家，或香港、澳門或台灣永久居民的中國公民；或
- (iii) 於中國內地登記、註冊成立或成立之任何法人、公司、合夥企業或其他實體。

- 本人/吾等新保單持有人並非中國內地人士，現夾附本人/吾等的非中國內地身份證明文件/公司註冊證書副本。
- 本人/吾等新保單持有人並非中國內地人士及為中國公民(不包括香港、澳門及台灣)，但居於中國境外，並為以下司法管轄區之永久居民，現夾附本人/吾等的身份證明文件及/或永久居民身份證明文件副本。

請註明

日期：\_\_\_\_\_ / 日 \_\_\_\_\_ / 月 \_\_\_\_\_ / 年

見證人簽署(見證所有簽署人)

新第一保單持有人簽署  
(公司蓋印，如適用)

新第二保單持有人簽署  
(只適用於聯名保單持有人)

X  
原有第一保單持有人簽署

X  
原有第二保單持有人簽署  
(只適用於聯名保單持有人)

X  
(姓名：\_\_\_\_\_)

公司專用

QFII

Non-QFII

核對簽署 \_\_\_\_\_

是  否

核對簽署 \_\_\_\_\_

是  否

請把已填妥的表格交回澳門新馬路61號永光廣場十四樓A宏利人壽保險(國際)有限公司澳門分行行政部。



## Manulife Personal Information Collection Statement

(Version 20150119\_M)

### DEFINITIONS

1. “**Controller**” and “**data subject**” used throughout this Manulife Personal Information Collection Statement (“**Statement**”) shall have the meaning as defined in the Act.

#### For the purpose of this Statement:

“**Act**” shall mean the Personal Data Protection Act (Act 8/2005).

“**customers**” shall mean data subjects and include (but not be limited to) existing and prospective insurance policy owners, insured, beneficiaries and other persons designated or entitled to receive moneys and/or other benefits under an insurance policy; and members under a pension fund or scheme; and share/unit holders of investment funds.

“**Macao**” shall mean the Macao Special Administrative Region.

“**Manulife**” shall mean Manulife (International) Limited.

“**Manulife Fund**” shall mean any investment fund sponsored or managed from time to time by a member of the Manulife Group (including but not limited to Manulife Global Fund and Manulife Advanced Fund SPC) and “**Manulife Funds**” shall mean all such investment funds.

“**Manulife Group**” shall mean Manulife Financial Corporation and its subsidiaries and affiliates (including but not limited to Manulife (International) Limited, Manulife Provident Funds Trust Company Limited, Manulife Asset Management (Hong Kong) Limited), and Manulife Funds. The rights and obligations of each member of Manulife Group under this Statement are several and not joint. No member of Manulife Group shall be liable for an act or omission by another member of Manulife Group.

“**matching procedures**” shall mean any procedure whereby personal data collected for one or more purposes in respect of 10 or more data subjects is compared (except by manual means) with personal data collected for any other purpose in respect of those data subjects where the comparison (a) is (whether in whole or in part) for the purpose of producing or verifying data that; or (b) produces or verifies data in respect of which it is reasonable to believe that it is practicable that the data, may be used (whether immediately or at any subsequent time) for the purpose of taking adverse action against any of those data subjects.

“**personal data**” shall have the meaning as defined in the Act and include Sensitive Data.

“**Sensitive Data**” shall mean personal data relating to philosophical or political beliefs, political society or trade union membership, religion, privacy and racial or ethnic origin, and health or sex life, including genetic data.

### COLLECTION

- From time to time, it is necessary for customers to supply Manulife with personal data in connection with the establishment or continuation of business relationship, or provision of products or services. Failure to supply such data may result in Manulife being unable to establish or continue the business relationship, or provide products or services.
- It is also the case that personal data are collected or received by Manulife from and/or in respect of customers in the ordinary course of the continuation of the business relationship, for example, when an application is made for a change of beneficiary/insured member under the insurance policy; or when notification is made by the employer of a change of employment/address of a member of a pension fund or scheme; or when a joint share holder of an investment fund applies for investment fund switching.

### PURPOSES

- The purposes for which personal data of a customer may be used will vary depending on the nature of the customer’s relationship with Manulife. Such purposes may include the following:-

- processing, assessing and determining applications or requests made by customers for products and/or services;
- administering, maintaining, managing and operating products and/or services provided to customers;
- confirming customer’s identity and uniquely identifying customer;
- confirming the accuracy of the information collected;
- understanding customer’s financial situation better, evaluating customer application, assessing the risks Manulife is assuming and reviewing claims submitted to Manulife;
- any purposes in connection with any claims made by or against or otherwise involving customers in respect of any products and/or services including but not limited to making, defending, analysing, investigating, processing, assessing, determining or responding to such claims;
- providing investment management services, dealing and advisory services, custody services, depository services and other services under the terms and conditions of the accounts a customer holds with Manulife;
- performing any functions and activities related to products and/or services including but not limited to marketing (including but not limited to direct marketing), audit, reporting, research, analysis, reinsurance, and general servicing and maintenance of online and other services;
- researching and/or designing products and/or services for customers, and promoting, improving and furthering the provision of products and/or services;
- conducting matching procedures;
- making disclosure under and/or complying with the requirements of any law, rules, regulations, codes of practice, guidelines or guidances binding on or applicable to Manulife or any member of Manulife Group (whether within or outside Macao) including but not limited to making disclosure to local or foreign regulators, governmental bodies, industry recognised bodies (whether within or outside Macao) such as federations or associations of insurers, credit reference agencies or auditors;
- complying with any contractual or other commitment or arrangement with local or foreign regulators, governmental bodies, or industry recognised bodies (whether within or outside Macao) that is assumed by or imposed on Manulife or any member of Manulife Group by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign regulators, governmental bodies, or industry recognised bodies;
- for operational purposes, credit assessment, credit scoring models or statistical analysis (including in each case, behaviour analysis and evaluation on the overall relationship with Manulife Group which includes using such data to comply with any obligations, requirements, policies, procedures, measures or arrangements for sharing data and information within Manulife Group and/or other use of data and information in accordance with any Manulife Group-wide programmes for compliance with sanctions or prevention or detection of money laundering, terrorist financing or other unlawful activities), whether on the data subjects or otherwise;
- exercising any rights Manulife may have in connection with the provision to customers of products and/or services;
- conducting identity and/or credit checks;
- determining any amount of indebtedness owing to or from customers, and collecting and recovering any amount owing from customers or any person who has provided any security or undertaking for customers’ liabilities;
- enabling an actual or proposed assignee, transferee, participant or sub-participant of the rights or business of Manulife or any member of Manulife Group to evaluate the transaction intended to be the subject of the assignment, transfer, participation or sub-participation;

- (r) purposes specifically provided for in any particular service or product offered by Manulife;
- (s) any purposes relating to the above (including seeking professional advices) or any other purposes in accordance with the general policies of Manulife or any member of Manulife Group in relation to insurance, pension funds or schemes, investment funds, wealth management services and other financial products and services as set out in notices, circulars, or other terms and conditions made available by Manulife or any member of Manulife Group to customers from time to time.

Manulife will fully comply with the Act in processing Sensitive Data.

## TRANSFEREES

5. Personal data of a customer held by Manulife will be kept confidential but Manulife may transfer such data to the following persons and/or entities (whether within or outside Macao) for any of the purposes set out in paragraph 4 above:-
- (a) any person in connection with any claims made by or against or otherwise involving customers in respect of any products and/or services;
  - (b) any agent, contractor or third party service provider who provides administrative, telecommunications, computer, information technology, payment, data processing or storage, marketing, mailing, printing, telemarketing, customer satisfaction analysis, or other services to Manulife or any member of Manulife Group in connection with the operation of business, including any custodian, depository, administrator, investment manager, investment advisor or distributor;
  - (c) any credit reference agencies or, in the event of default, any debt collection agencies;
  - (d) any advisor (including his or her employees) or other intermediary (including their employees);
  - (e) reinsurers and medical service providers;
  - (f) employers of the customers;
  - (g) any person which has undertaken to Manulife or any member of Manulife Group to keep such data confidential;
  - (h) any actual or proposed assignee, transferee, participant or sub-participant of the rights or business of Manulife or Manulife Group;
  - (i) any member of Manulife Group;
  - (j) any person to whom Manulife or any member of Manulife Group is under an obligation or otherwise required to make disclosure under the requirements of any law, rules, regulations, codes of practice, guidelines or guidances binding on or applicable to Manulife or any member of Manulife Group including but not limited to any local or foreign regulators, governmental bodies, or industry recognised bodies;
  - (k) any person to whom Manulife or any member of Manulife Group is under an obligation or otherwise required to make disclosure pursuant to any contractual or other commitment or arrangement with local or foreign regulators, governmental bodies, or industry recognised bodies (whether within or outside Macao) that is assumed by or imposed on Manulife or any member of Manulife Group by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign regulators, governmental bodies, industry recognised bodies.

## USE OF PERSONAL DATA IN DIRECT MARKETING

6. Manulife intends to use, from time to time, customer's personal data in direct marketing of the following products and services:
- (a) insurance, pension funds and/or schemes, investment funds, wealth management services, or other financial products and services;
  - (b) reward, loyalty or privilege programmes and related products and services;
  - (c) products and services of co-branding partners of any member of Manulife Group (the names of such co-branding partners can be

found in the application form(s) for the relevant products and services as the case may be).

Only the following kinds of personal data of the customer may be used in such direct marketing:

- (a) name;
- (b) gender;
- (c) date of birth;
- (d) part of identity card or passport number;
- (e) contact information (including but not limited to phone number, fax number, email address, correspondence address and residential address);
- (f) information about the products and/or services the customer has purchased or applied, including the distribution channels (including their individual advisors or intermediaries) through which the products and/or services were purchased or applied for.

Manulife may not so use the data unless it has received the customer's consent to the intended use.

## PROVISION OF PERSONAL DATA FOR USE IN DIRECT MARKETING

7. Manulife intends to provide, from time to time and **for money and other property**, customer's personal data to Manulife Group (other than Manulife itself) for use by Manulife Group in direct marketing of the following products and services:
- (a) insurance, pension funds and/or schemes, investment funds, wealth management services, or other financial products and services;
  - (b) reward, loyalty or privilege programmes and related products and services;
  - (c) products and services of co-branding partners of any member of Manulife Group (the names of such co-branding partners can be found in the application form(s) for the relevant products and services as the case may be).
- Only the following kinds of personal data of the customer may be provided to Manulife Group (other than Manulife itself) for use by Manulife Group in such direct marketing:
- (a) name;
  - (b) gender;
  - (c) date of birth;
  - (d) part of identity card or passport number;
  - (e) contact information (including but not limited to phone number, fax number, email address, correspondence address and residential address);
  - (f) information about the products and/or services the customer has purchased or applied, including the distribution channels (including their individual advisors or intermediaries) through which the products and/or services were purchased or applied for.

Manulife may not so provide the data unless it has received the customer's written consent to the intended provision.

8. Under the Act, a data subject has the right to:-
- (a) request access to his or her personal data;
  - (b) request correction of any of his or her personal data which is inaccurate;
  - (c) be informed of the kind of personal data held by the controller;
  - (d) be informed of the main purposes for which personal data held by the controller are or are to be used;
  - (e) make data access request and data correction request through the channel set out in paragraph 9 below.
9. In accordance with the provisions of the Act, Manulife has the right to charge a reasonable fee for processing any data access request. Requests may be made in writing to the Privacy Officer at:-

Manulife (International) Limited  
Macao Administration Office, Avenida De Almeida Ribeiro  
No. 61, Circle Square, 14 andar A, Macao

## 宏利個人資料收集聲明 (20150119\_M版本)

### 定義

1. 本宏利個人資料收集聲明(「聲明」)中使用的「**負責處理個人資料的實體**」及「**資料當事人**」,具有《法律》中規定的含義。

就本聲明而言:

「法律」指《個人資料保護法》(第8/2005號法律)。

「客戶」指資料當事人,包括(但不限於)現有及潛在保單持有人、受保人、受益人或指定或有權獲得保單下的款項及/或其他利益的其他人士;及退休基金或退休金計劃下的成員;及投資基金的股份/單位持有人。

「澳門」指澳門特別行政區。

「宏利」指宏利人壽保險(國際)有限公司。

「某一宏利基金」指由宏利集團的某一成員不時所發起或管理的任何投資基金(包括但不限於宏利環球基金及宏利盈進基金SPC),而「**宏利基金**」指所有此等投資基金。

「**宏利集團**」指宏利金融有限公司及其子公司和關聯公司(其中包括但不限於宏利人壽保險(國際)有限公司、宏利公積金信託有限公司、宏利資產管理(香港)有限公司)及宏利基金。宏利集團每一成員於本聲明下的權利和義務,均為單獨而非連帶的。對於宏利集團另一成員的任何作為或不作為,宏利集團的任何其他成員概不承擔任何責任。

「**核對程序**」指將為1個或1個以上的目的而取自10個或10個以上的資料當事人的個人資料與為其他目的而自該等資料當事人收集的個人資料比較的程序(用人手方法的除外),而—

- (a) 所作比較(不論是全部的還是部分的)是為了產生和核實可(即時或於其後任何時間)用作對任何該等資料當事人採取不利行動的資料的;或
- (b) 所作比較產生和核實資料,而就該資料而言可合理地相信將該資料(即時或於其後任何時間)用作對任何該等資料當事人採取不利行動是切實可行的。

「**個人資料**」指《法律》中規定的含義,及包括敏感資料。

「**敏感資料**」指與世界觀或政治信仰、政治社團或工會關係、宗教信仰、私人生活、種族和民族本源以及與健康和性生活有關的個人資料。

### 收集

2. 為建立或繼續業務關係或提供產品或服務,客戶需要不時向宏利提供個人資料。如未能提供該等資料可能導致宏利無法建立或繼續業務關係,或無法提供產品或服務。
3. 另外,宏利在業務關係存續的正常過程中(例如,申請變更保單下的受益人/受保人;或僱主通知變更參與退休基金或退休金計劃的成員的僱用情況/地址;或投資基金聯合股份持有人申請基金轉換)從客戶處及/或針對客戶收集或獲得個人資料。

### 目的

4. 取決於客戶與宏利的關係性質,使用客戶個人資料的目的各有不同。該等目的可能包括:
- (a) 處理、評估和確定客戶對產品及/或服務的申請或要求;
  - (b) 執行、維持、管理和運作向客戶提供的產品及/或服務;

- (c) 確認客戶身份並識別客戶;
- (d) 確認所收集資訊的準確性;
- (e) 加深了解客戶的財務狀況、評估客戶申請、評估宏利所承擔的風險並審核提交給宏利的理賠;
- (f) 與客戶提出、針對客戶提出或在其他方面涉及客戶的、與任何產品及/或服務相關的任何索賠有關的任何目的,其中包括但不限於提出該等索賠、就其進行辯護、分析、調查、處理、評估、確定和應對;
- (g) 根據客戶在宏利持有的帳戶的條款和條件提供投資管理服務、交易和顧問服務、託管服務、受寄人服務和其他服務;
- (h) 履行與產品及/或服務相關的任何職責和活動,包括但不限於市場推廣(包括但不限於直接促銷)、審計、報告、研究、分析、再保險以及一般服務和維持網上及其他服務;
- (i) 為客戶研究及/或設計產品及/或服務,宣傳、改進和改善產品及/或服務的提供;
- (j) 開展核對程序;
- (k) 根據對宏利或宏利集團任何成員(無論在澳門境內還是境外)有約束力或對其適用的任何法律、法規、規章、守則、指引或指南的規定進行披露,包括但不限於向當地或外國的監管機構、政府機構、諸如保險公司聯會或協會等公認行業組織(無論在澳門境內還是境外)、信貸資料服務機構或審計機構進行披露;
- (l) 由於宏利或宏利集團任何成員在相關當地或外國監管機構、政府機構、或公認行業組織(無論在澳門境內還是境外)所在司法管轄區的或涉及該等司法管轄區的財務、商業、業務或其他利益或活動而由宏利或宏利集團任何成員承擔或施加給其的、與該等當地或外國監管機構、政府機構、或公認行業組織之間的任何合同、其他承諾或安排;
- (m) 用於經營目的、信貸評估、信貸評分模型或統計分析(每項均包括行為分析以及對與宏利集團之間總體關係的評估,其中包括為遵守關於在宏利集團內部共用資料和資訊的任何義務、要求、政策、程序、措施或安排而使用該等資料,及/或根據宏利集團內任何有關遵守制裁或防止或發現洗錢、為恐怖分子提供資金或其他非法活動的計劃而對資料和資訊進行的其他使用),無論是針對資料當事人還是其他人的;
- (n) 行使宏利在向客戶提供產品及/或服務方面可能享有的任何權利;
- (o) 進行身份及/或信貸核查;
- (p) 確定應向客戶支付或客戶應付的任何債務金額,向客戶或向為客戶債務提供任何擔保或承諾的任何人收取和追討任何應收金額;
- (q) 使宏利或宏利集團任何成員的權利或業務的實際或擬議受讓人、承讓人、參與人或次級參與人能對該等轉讓、參與或次級參與擬涉及的交易進行評估;
- (r) 宏利提供的任何特定服務或產品中具體規定的目的;
- (s) 與上述相關的任何目的(包括尋求專業意見),或根據宏利或宏利集團任何成員的一般政策進行的、與保險、退休基金或退休金計劃、投資基金、財富管理服務以及宏利或宏利集團任何成員不時向客戶提

供的通知、通告或其他條款和條件中所述的其他金融產品和服務相關的任何其他目的。

當處理敏感資料時，宏利將完全遵守《法律》。

## 承轉人

5. 宏利持有的客戶個人資料將予以保密，但宏利可就上文第4條所載的任何目的將該等資料移轉給下列人士及/或實體（無論在澳門境內還是境外）：

- (a) 與客戶、針對客戶或涉及客戶就任何產品及/或服務提起的任何索賠相關的任何人士；
- (b) 向宏利或宏利集團任何成員提供與業務經營相關的行政管理、電信通訊、電腦、資訊技術、付款、資料處理或儲存、市場推廣、郵寄、列印、電話行銷、客戶滿意度分析或其他服務的任何代理、承辦商或第三方服務供應商，包括任何託管人、受寄人、執行人、投資管理人、投資顧問或分銷商；
- (c) 任何信貸資料服務機構或（如出現付款違約）任何債務托收機構；
- (d) 任何顧問（包括其僱員）或其他中介人士/機構（包括其僱員）；
- (e) 再保險商和醫療服務供應商；
- (f) 客戶的僱主；
- (g) 已向宏利或宏利集團任何成員承諾將對該等資料保密的任何人士；
- (h) 宏利或宏利集團的權利或業務的任何實際或擬議受讓人、承讓人、參與人或次級參與人；
- (i) 宏利集團的任何成員；
- (j) 宏利或宏利集團任何成員根據對其有約束力或適用的任何法律、法規、規章、守則、指引或指南的規定有義務或必須向其披露的任何人士，其中包括但不限於任何當地或外國的監管機構、政府機構或公認行業組織；
- (k) 根據由於宏利或宏利集團任何成員在相關當地或外國監管機構、政府機構、或公認行業組織（無論在澳門境內還是境外）所在司法管轄區的或涉及該等司法管轄區的財務、商業、業務或其他利益或活動而由宏利或宏利集團任何成員承擔或施加給其的、與該等當地或外國監管機構、政府機構、公認行業組織之間的任何合同、其他承諾或安排，有義務或必須向其披露的任何人士。

## 個人資料在直接促銷中的使用

6. 宏利擬在下列產品和服務的直接促銷中不時使用客戶的個人資料：

- (a) 保險、退休基金及/或退休金計劃、投資基金、財富管理服務或其他金融產品和服務；
- (b) 獎勵、忠誠度或特權計劃及相關產品和服務；
- (c) 宏利集團任何成員的合作品牌夥伴的產品和服務（合作品牌夥伴名稱見相關產品和服務（視情況而定）的申請表）。

在該等直接促銷中，僅可使用下列類型的客戶個人資料：

- (a) 姓名；
- (b) 性別；
- (c) 出生日期；
- (d) 身份證或護照號碼的一部分；
- (e) 聯絡資料（包括但不限於電話號碼、傳真號碼、電郵地址、通訊地址及住宅地址）；

(f) 客戶已購買或申請的產品及/或服務的資料，包括購買或申請的產品及/或服務的分銷渠道（包括其個人顧問或中介機構）。

除非宏利已經就擬議使用獲得客戶的同意，否則不得如上所述使用資料。

## 提供個人資料作直接促銷

7. 宏利擬向宏利集團（除宏利本身之外）不時提供客戶的個人資料供宏利集團就下列產品和服務作直接促銷之用，以換取**金錢和其他財產**：

- (a) 保險、退休基金及/或退休金計劃、投資基金、財富管理服務或其他金融產品和服務；
- (b) 獎勵、忠誠度或特權計劃及相關產品和服務；
- (c) 宏利集團任何成員的合作品牌夥伴的產品和服務（該等合作品牌夥伴名稱見相關產品和服務（視情況而定）的申請表）。

僅可向宏利集團（除宏利本身之外）提供下列類型的客戶個人資料供宏利集團作該等直接促銷之用：

- (a) 姓名；
- (b) 性別；
- (c) 出生日期；
- (d) 身份證或護照號碼的一部分；
- (e) 聯絡資料（包括但不限於電話號碼、傳真號碼、電郵地址、通訊地址及住宅地址）；
- (f) 客戶已購買或申請的產品及/或服務的資料，包括購買或申請的產品及/或服務的分銷渠道（包括其個人顧問或中介機構）。

除非宏利已就擬議提供獲得客戶的書面同意，否則不得如上所述提供資料。

8. 根據《法律》，資料當事人有權：

- (a) 要求查閱其個人資料；
- (b) 要求對其任何不準確的個人資料進行改正；
- (c) 了解負責處理個人資料的實體持有的個人資料類型；
- (d) 了解負責處理個人資料的實體持有的個人資料的主要目的或主要擬議目的；
- (e) 通過下文第9條所載的渠道提出查閱資料要求和改正資料要求。

9. 根據《法律》規定，宏利有權就處理任何查閱資料要求收取合理費用。要求可以書面形式提交給個人資料主任：

宏利人壽保險（國際）有限公司  
澳門新馬路61號永光廣場十四樓A