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Branch code 分行編號	_____	Location 地點	<b>MACAO</b>
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	_____		

**Manulife Investment Solutions/Manulife Investment Plus  
Investment Choice Services Form**  
 宏利智富錦囊 / 宏利投資計劃  
 投資選項服務申請表

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

**Important Notes 重要事項：**

- (1) 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。
- (2) 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分之註釋（如適用）。
- (3) 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。
- (4) 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。
- (5) 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。
- (6) 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。
- (7) Manulife Inv Aggressive Portfolio, Manulife Inv Balanced Portfolio, Manulife Inv Growth Portfolio and Manulife Inv Stable Portfolio (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 February 3, 2016. If you have arranged regular subscription to the Closing Investment Choice(s) but your holdings are reduced to zero on or after February 3, 2016, your future subscription will be automatically allocated to Manulife Inv Amundi Cash Fund (previously named Manulife Inv Cash Fund).  
若閣下於2016年2月3日或以後並未持有宏利智富進取組合、宏利智富均衡組合、宏利智富增長組合及宏利智富平穩組合（「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2016年2月3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宏利智富東方匯理現金基金（前稱宏利智富現金基金）。
- (8) There are different operations and limitations on Manulife Inv China A Fund and Manulife Inv China Bond Fund. Please refer to the Annex 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。現摘述其主要交易安排如下：
  - 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。
- (9) Please contact your advisor or call our Customer Service Hotline at (852) 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(852) 2108 1110查閱最新可供選擇的投資選項。
- (10) Please read the Manulife Personal Information Collection Statement (version 20150119\_M) ("Statement") before you complete this form. The Statement is 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 Statement.  
當閣下填寫此表格前，請閱華《有關〈宏利個人資料收集聲明〉（20150119\_M版本）》（聲明）。該聲明可於宏利網址（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，即表示閣下同意該聲明之內容。

**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 重要：**

- (1) 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.  
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。
- (2) To comply with the Regulatory's requirements, please complete and return the Financial Needs Analysis, Risk Profile Questionnaire, Important Facts Statement and Applicant's Declarations for single subsequent subscription, regular/ increase of existing regular subscription amount.  
為遵守保險業監管機構要求，如申請單次增加認購／定期認購／增加現有定期認購金額均須提交已填妥的理財需要分析、風險承擔能力問卷、重要資料聲明書及投保人聲明書。

 **Single Subsequent Subscription** <sup>(1), (3)</sup> **單次增加認購** <sup>(1), (3)</sup>  
*(Please fill in the subscription allocation in the table below. Subscription allocation specified below is applicable to this subsequent subscription only.)*  
 請於下表填妥認購分配，以下所填寫之認購分配只應用於是次增加認購。

 Payment Currency 付款幣值：  USD 美元  HKD 港元

Payment Amount 付款金額： \_\_\_\_\_

 Paid By 繳付方式：  
 Cheque 支票  Bank Draft 匯票  
 Transfer from policy no\* 調動自保單編號\*

\* 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。

 **New Application of Regular Subscription** <sup>(2)</sup> **新設定期認購** <sup>(2)</sup>  
*(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.)*  
 請填妥、簽署及附上直接付款授權書正本以便設立銀行自動轉帳，並於下表填妥定期認購分配。

 **Change of Existing Regular Subscription Information** <sup>(2)</sup>  
**更改現有定期認購資料** <sup>(2)</sup>  
*(Please fill in the anticipated changed item below. 請選擇下列須作更改的項目。)*

Amount 付款金額： \_\_\_\_\_

 Payment Mode 繳付形式：  
 Monthly 月繳  Semi-Annual 半年繳  
 Quarterly 季繳  Annual 年繳

Please specify the effective date 請註明生效日期：

\_\_\_\_\_ (DD 日/MM 月/YYYY 年)

*(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)*
**Source(s) of fund for all subscriptions 所有認購款項來源：**

- |  |  |   |   |
|--|--|---|---|
| <input type="checkbox"/> Savings 儲蓄                          | <input type="checkbox"/> Wages income 受僱收入         | <input type="checkbox"/> Self-employment income 自僱收入  | <input type="checkbox"/> Investment income 投資收入 |
| <input type="checkbox"/> Sale of an asset 出售資產               | <input type="checkbox"/> Gift or inheritance 饋贈或遺產 | <input type="checkbox"/> Settlement of insurance 保險收款 |   |
| <input type="checkbox"/> Other (please specify) 其他（請註明）_____ |  |   |   |

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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）**

Investment Choice Code 投資選項編號 (Please refer to Investment Choice Table 請參閱投資選項表)	Single Subsequent <sup>^</sup> Subscription Allocation 單次增加認購分配 <sup>^</sup>	Regular Subscription Allocation <sup>^</sup> 定期認購分配 <sup>^</sup>
	<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)
<b>TOTAL 合計 (100% OR 或 USD 美元)</b>		

<sup>^</sup> 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。

**Remarks on Part A 第一部份註釋**

- 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」。
- 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。
- 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](http://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](http://www.manulife.com.hk)。
- Subsequent subscription is currently allowed for Manulife Inv China A Fund and Manulife Inv China Bond Fund with minimum subscription amount of US\$1,500 per investment choice.  
「宏利智富中國A股基金」及「宏利智富中國債券基金」現接受增加認購，惟每項投資選項之最低金額為1,500美元。
- No regular 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」暫不設定期認購之安排。
- If Payout Distribution Investment Choice(s) is/are selected, please complete and submit the form of “Application for Payout Distribution Investment Choice” with copy of bank account proof.  
如欲選擇支付派發投資選項，請填妥「支付派發投資選項申請表」，並連同銀行存摺影印本一併提交。

**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，定期自動轉換便會啟動，直至轉出投資選項的帳戶價值用罄為止。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罄為止。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日外，可接受一個月內的任何一個交易日；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 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」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 Amundi 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「宏利智富東方匯理現金基金」。
- 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。
- 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。
- If Payout Distribution Investment Choice(s) is/are selected, please complete and submit the form of “Application for Payout Distribution Investment Choice” with copy of bank account proof.  
如欲選擇支付派發投資選項，請填妥「支付派發投資選項申請表」，並連同銀行存摺影印本一併提交。

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To comply with the industry guidelines, for application for redemption or full surrender, please attach copy of policyowner's ID 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。

Part C: Redemption (Please complete Part E)  
第三部份：贖回（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 Code 投資選項編號 (Please refer to Investment Choice Table 請參閱投資選項表)	Percentage (%) 百分比	Units 單位	Amounts (USD) 金額 (美元)
	%		
	%		
	%		
	%		
	%		
	%		
	%		
	%		
	%		
	%		
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	%		
	%		
	%		
	%		
	%		
	%		
	%		

Remarks on Part C 第三部份註釋

- (1) Minimum redemption per policy is USD1,000.  
每份保單之最低贖回金額為1,000美元。
- (2) If the remaining Account Value of the Investment Choice after the redemption is less than USD1,500, all selected investment choices, less early redemption fee and/or exit fee (if any), of the Investment Choice may be redeemed at the Company's discretion.  
如贖回後的投資選項帳戶價值低於1,500美元，本公司有權將有關投資選項於扣除提早贖回費及 / 或退出費(如適用)後全數贖回。
- (3) Manulife Inv China A Fund and Manulife Inv China Bond Fund can be redeemed in terms of the Percentage or Units.  
「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作為贖回指示。
- (4) If the remaining Policy Value of the policy after the redemption is less than USD5,000, all selected investment choices, less early redemption fee and/or exit fee (if any), of the Investment Choices under the policy may be redeemed at the Company's discretion, and the policy will be terminated.  
如贖回後的保單價值低於5,000美元，本公司有權將保單內所有投資選項於扣除提早贖回費及 / 或退出費(如適用)後全數贖回，而保單亦隨即終止。
- (5) Early redemption fee will be levied within the first 5 years of subscription of the relevant selected investment choices. Redemption proceeds will be paid after deduction of the early redemption fee.  
如有關投資選項於認購後首五年內贖回，則每次贖回需徵收提早贖回費，贖回金額將扣除有關提早贖回費後支付。
- (6) The Policyowner understands that early redemption fees may be levied as per the following schedule.  
保單持有人明白本公司可收取提早贖回費。有關收費的細則如下：

Subscription of less than 認購年期不足	% of redemption amount 佔贖回金額之百分比
1 year 年	6%
2 years 年	5%
3 years 年	4%
4 years 年	3%
5 years 年	2%

- (7) 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)。

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### Part D: Full Surrender (please return Policy Contract and complete Part E) 第四部份：全數退保（請退回保單合約及填寫第五部份）

The policyowner requests the Company to surrender the policy for its Policy Value. The policyowner understands that early redemption fees and/or exit fee (if any) may be levied as appropriate. 保單持有人要求本公司退保以提取保單價值，保單持有人明白本公司可收取有關提早贖回費及 / 或退出費（如適用）。

- Returned Policy Contract 退回保單合約 or 或  
 Lost Policy Contract 遺失保單合約 (Please complete Declaration of loss of policy below. 請填寫下列保單遺失聲明)

I/We, the policyowner of \_\_\_\_\_ (policy number) hereby declare that the policy was last in my/our possession and was lost on or about \_\_\_\_\_ (DD/MM/YYYY).  
 I/We also declare that the policy cannot be found after diligent search and inquiry have been made, and is not in the possession or control of any other person to the best of my/our knowledge.

本人 / 吾等為 \_\_\_\_\_ (保單編號) 之保單持有人，現謹此聲明，此保單遺失前由本人 / 吾等所保管，並約於 \_\_\_\_\_ (年/月/日) 遺失。本人 / 吾等並謹此聲明已盡力尋找及查詢但未能尋獲保單，而此保單亦未由其他人士持有或保管。

### Part E: Payment Instructions 第五部份：付款指示

For withdrawal instruction(s), please complete this section. 若申請提取金額，請填寫此部份。

- By Cheque 以支票形式

#### Cheque Collection Method 支票交付方法

- Through my Insurance Advisor 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最新通訊地址

#### Cheque Currency 支票幣值

- MOP Cheque<sup>(a)</sup> 澳門元支票<sup>(a)</sup>  
 HKD Cheque<sup>(b)</sup> 港元支票<sup>(b)</sup>  
 Same as Policy Currency 與保單幣值相同  
For USD policy only<sup>(c)</sup> 只適用於美元保單<sup>(c)</sup>  
 USD Cheque (drawn in Hong Kong) 美元支票（由香港的銀行付款）  
 USD Cheque (drawn in United States) 美元支票（由美國的銀行付款）

#### Notes 註：

- (a) The MOP equivalent will be based on the currency exchange rate provided by the Company at the time of issue of the cheque and it can be changed from time to time. 相等之澳門元將會以支票發出時的貨幣兌換率計算，而宏利將不時提供有關的貨幣兌換率。  
 (b) The HKD equivalent will be based on the currency exchange rate provided by the Company at the time of issue of the cheque and it can be changed from time to time. 相等之港元將會以支票發出時的貨幣兌換率計算，而宏利將不時提供有關的貨幣兌換率。  
 (c) In general, it takes a long settlement period to clear a foreign cheque in Macao. Bank charges may be incurred by client for clearing the cheque. 銀行通常需要較長的結算時間於澳門兌現外幣支票；另銀行或會向客戶徵收兌現支票的相關手續費。

- Transfer to my/our other individual insurance policy 轉移至本人 / 吾等其他之指定個人保險保單 (please ensure Part C or Part D is completed 請確保第三或第四部份已填妥)

Policy number 保單編號			
Amount 金額	<input type="checkbox"/> USD 美元 <input type="checkbox"/> HKD 港元 \$ _____	<input type="checkbox"/> USD 美元 <input type="checkbox"/> HKD 港元 \$ _____	<input type="checkbox"/> USD 美元 <input type="checkbox"/> HKD 港元 \$ _____
Purpose 用途	<input type="checkbox"/> Premium Payment 繳付保費 <input type="checkbox"/> Loan Repayment 償還貸款 <input type="checkbox"/> Other 其他 _____	<input type="checkbox"/> Premium Payment 繳付保費 <input type="checkbox"/> Loan Repayment 償還貸款 <input type="checkbox"/> Other 其他 _____	<input type="checkbox"/> Premium Payment 繳付保費 <input type="checkbox"/> Loan Repayment 償還貸款 <input type="checkbox"/> Other 其他 _____

