



MANULIFE INVESTMENT SOLUTIONS/  
MANULIFE INVESTMENT PLUS/  
POLICY CHANGE/ SERVICES FORM (BY FAX)  
宏利智富錦囊 / 宏利投資計劃 / 宏利優裕錦囊  
保單服務 / 服務申請表(傳真)

FAX ONLY  
Please DO NOT submit the original form  
只供傳真，請勿提交正本表格

Enquiry Hotline 查詢熱線：  
(852) 2108 1110

FAX 傳真號碼：(853) 6330 3823

TO 致：Manulife (International) Limited 宏利人壽保險(國際)有限公司

Policy no. 保單編號	Policyowner's name 保單持有人姓名	Policyowner's daytime contact no. 保單持有人日間聯絡電話
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Important Notes - Please read before filling in this form 重要事項 - 請於填寫此表格前參閱有關內容

- Please complete this form in English and in block letters with clear handwriting, any amendments should be endorsed by the policyowner in full signature.  
請用英文正楷清楚地填寫此表格；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。
- 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）。
- The 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。
- The requested switching out/ redemption/ withdrawal amount is subject to the maximum available unit(s)/amount of the investment choice.  
可轉出/贖回/提取之金額以該投資選項之最高可動的單位/金額為限。
- To carry out an instruction, this form should be completed, signed and received by Manulife (International) Limited ("the Company") by 3:00p.m. Hong Kong time provided that the day is a dealing day, which will be 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.  
如欲作出投資選擇指示，須填妥及簽署此表格，並於交易日的日子及香港時間下午三時前送交宏利人壽保險（國際）有限公司（「本公司」）。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。
- If more than one instructions for either switching/ redemption/ withdrawal are received from you by facsimile in respect of same/different transactions on or before 3:00p.m. Hong Kong time, the Company will rely on the last received instruction and has the sole discretion to determine the validity and/or priority in dealing with such instructions.  
倘本公司於香港時間下午三時前收到閣下就相同或不同交易發出超過一項以傳真作出的任何一項的轉換/贖回/提取指示，本公司只會處理最後收到之指示及可全權酌情決定該等指示之有效性及處理先後次序。
- Manulife Investment Solutions/Manulife Investment Plus 宏利智富錦囊 / 宏利投資計劃：  
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)。
- After your request is processed, you will receive a "Switching Notice/ Redemption Notice/ Withdrawal Notice" as a confirmation of this application for switching/ redemption/ withdrawal. Please verify and report to the Company any inaccuracies in the information provided by the said notice within 30 days after the Date of Notice. Unless and until the Company has verified any inaccuracies, the said notice may, at the discretion of the Company, be deemed as true and correct and be used for all relevant administration and/or investment allocation on the policy where applicable.  
當閣下之申請獲處理後，閣下將收到「轉換通知書/ 贖回通知書/ 基金提取通知書」以確認是次轉換/贖回/提取申請已被辦妥。請核對該通知書所列資料，如資料有誤，請於通知書發出日期起30天內通知本公司。本公司在確認有關資料為錯誤之前，有權將之視為正確無誤，並作為閣下就保單行政及/或投資分配的依據。
- This form is not for full surrender request. Policyowner should complete the "Manulife Investment Solutions/ Manulife Investment Plus Investment Choice Services Form" (WM02\_M).  
此表格不適用於全數退保申請。保單持有人必須填寫「宏利智富錦囊 / 宏利投資計劃投資選項服務申請表」(WM02\_M)。
- 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。

SWITCHING 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。

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	<input type="checkbox"/> Units 單位	<input type="checkbox"/> Amounts 金額 (USD 美元)	

Remarks 註釋

- 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。
- The minimum switching from one investment choice to another investment choice is USD250 for Manulife Investment Solutions ("MISO")/Manulife Investment Plus ("MI PLUS") and USD10,000 for Manulife Secure IncomePlus ("MSIP") respectively. If the remaining Account Value of the switching out investment choice is less than USD1,500 for MISO/ MI PLUS and USD10,000 for MSIP, all selected investment choices, less switching 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.  
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分別為250美元（適用於宏利智富錦囊 / 宏利投資計劃）及10,000美元（適用於宏利優裕錦囊）。如轉換後的投資選項帳戶價值低於1,500美元（適用於宏利智富錦囊 / 宏利投資計劃）及10,000美元（適用於宏利優裕錦囊），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（如適用）後轉換至轉入投資選項。
- 6 free switch requests for MSIP per Policy Year. For subsequent switches, the Company may at its discretion charge a switching fee and/or exit fee (if any).  
（適用於宏利優裕錦囊）每保單年度可獲免費轉換為六次，其後如需轉換，本公司可酌情收取轉換費及/或退出費（如適用）。
- 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）。
- Settlement limit(s) on redemption/switching out amount may be applied for Manulife Inv China A Fund and Manulife Inv China Bond Fund.  
「宏利智富中國A股基金」和「宏利智富中國債券基金」的結算限制或適用於贖回或轉出款額。
- 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。

The Chinese version of this application is for reference only. In the event of conflicts between the Chinese and the English versions, the English version shall prevail. 此申請表之中文譯本只供參考之用，若與英文有異，一概以英文為準。  
Manulife (International) Limited (Incorporated in Bermuda with limited liability)  
宏利人壽保險（國際）有限公司（於百慕達註冊成立之有限責任公司）

WM02F\_M (01/2017)

Advisor's name & code 顧問姓名及編號	Advisor's daytime contact no. 顧問日間聯絡電話
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To comply with the industry guidelines, for application for redemption, 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，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。

## REDEMPTION/ UNSCHEDULED WITHDRAWAL 贖回/ 不定期提取

The policyowner requests the Company to redeem/ withdraw the following investment choice as stated below. The percentage (%) / Units/ amounts to be redeemed/ withdrawn is indicated as follows.

保單持有人要求本公司對現有投資選項作出下列贖回或提取。所贖回或提取的百分比(%) / 單位 / 金額列明如下：

Code 編號	Percentage 百分比 (%)	Units 單位	Amount 金額 (USD 美元)
	%		
	%		
	%		
	%		
	%		

### Remarks 註釋

- Minimum redemption is USD1,000 for MISO/ MI PLUS and minimum withdrawal is USD5,000 for MSIP and may subject to early redemption fee/ withdrawal charge/ exit fee (if any). 宏利智富錦囊/ 宏利投資計劃之最低贖回金額為1,000 美元及宏利優裕錦囊之最低提取金額為5,000 美元，並可能徵收提早贖回費或提取費用及 / 或退出費 (如適用)。
- If the remaining Account Value of the Investment Choice after the redemption/ withdrawal is less than USD1,500 for MISO/ MI PLUS and USD10,000 for MSIP, all selected investment choices, less early redemption fee/ withdrawal charge/ exit fee (if any), of the Investment Choice may be redeemed/ withdrawn at the Company's discretion. 如贖回或提取後的投資選項帳戶價值低於1,500 美元(適用於宏利智富錦囊/ 宏利投資計劃)或10,000 美元(適用於宏利優裕錦囊)，本公司有權將有關投資選項於扣除提早贖回費 / 提取費用 / 退出費(如適用)後全數贖回或提取。
- If the remaining Policy Value of the policy after the redemption/ withdrawal is less than USD5,000 for MISO/ MI PLUS and USD10,000 for MSIP, all selected investment choices, less early redemption fee/ withdrawal charge/ exit fee (if any), of the Investment Choices under the policy may be redeemed/ withdrawn at the Company's discretion, and the policy will be terminated. 如贖回或提取後的保單價值低於5,000 美元(適用於宏利智富錦囊/ 宏利投資計劃)或10,000 美元(適用於宏利優裕錦囊)，本公司有權將保單內所有投資選項於扣除提早贖回費 / 提取費用 / 退出費(如適用)後全數贖回或提取，而保單亦隨即終止。
- Early redemption fee/ withdrawal charge may be levied within the first 5 years of subscription. Redemption/ withdrawal amount will be paid after deduction of the early redemption fee/ withdrawal charge (if any). 如於認購後首五年內贖回或提取，則每次贖回或提取可能徵收提早贖回費或提取費用，提取金額將扣除有關提早贖回費或提取費用(如適用)後支付。
- For MSIP, withdrawals in the first 10 policy years will result in forfeiture of Deferral Bonus in that year and all future years. 宏利優裕錦囊中，如在首十個保單年度作出提取，該年及往後年份的獎金均會被取消。
- For MSIP, fees for surrender or withdrawal in excess of Guaranteed Withdrawal Amount/ Income for Life are levied as below. The Policyowner understands the following fee schedule for early redemption fee for MISO and MI PLUS / withdrawal charge for MSIP. 保單持有人明白以下宏利智富錦囊和宏利投資計劃的提早贖回費收費表或宏利優裕錦囊的提取費用收費表。宏利優裕錦囊的退保及超越保證提取金額/永久入息提取須收取有關費用，詳情如下：

Subscription of less than 認購年期不足	% of redemption amount/ excessive withdrawal/ surrender amount 佔贖回金額或佔超越提取/退保金額之百分比
1 year 年	6%
2 years 年	5%
3 years 年	4%
4 years 年	3%
5 years 年	2%

- Manulife Inv China A Fund and Manulife Inv China Bond Fund can be redeemed in terms of unit/ percentage. 「宏利智富中國A股基金」及「宏利智富中國債券基金」容許以單位或百分比形式贖回。
- 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)。
- Settlement limit(s) on redemption/switching out amount may be applied for Manulife Inv China A Fund and Manulife Inv China Bond Fund. 「宏利智富中國A股基金」和「宏利智富中國債券基金」的結算限制或適用於贖回或轉出款額。

## PAYMENT INSTRUCTIONS 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。

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**DECLARATION 聲明**

I/We, 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. I/We, have read and fully understood the above Important Notes before signing this form. I/We confirm that the request is made at my/our own volition and at my/our own risk after reading and understanding all relevant information relating to the policy. I/We shall make my/our own independent decisions/judgements in respect of this application for switching/ redemption/ withdrawal or any other matters relating to my/our selected investment choices and my/our policy. I/We, confirm and fully understand/aware of the associated risk and return of the Investment Choices chosen by me/us, which may or may not be suitable for me/us. I/We, declare that I/we, do not have any bankruptcy petition made against me/us.

本人 / 吾等 (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。在簽署此表格前，本人 / 吾等已細閱以上之重要事項。本人 / 吾等就轉換 / 贖回 / 提取或其他本人 / 吾等所選擇的投資選項及保單之事項作獨立決定 / 判斷。本人 / 吾等於細閱及明白所有相關保單資料後，確認此要求乃本人 / 吾等的意願，並願意承擔所有風險。本人 / 吾等確認及充份理解 / 認識本人 / 吾等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 / 吾等。本人 / 吾等聲明本人 / 吾等現時並沒有破產。

It is declared, understood and agreed that (1) the Company is authorized and instructed to accept and execute the switching/ redemption/ withdrawal instructions given by me/us by facsimile. However, the Company may, in its absolute discretion, refuse to act upon any facsimile instructions received and may require original written instructions in another prescribed form instead. (2) The Company may rely conclusively upon and shall incur no liability in acting upon any switching instructions believed by it in good faith to be genuine or to be signed by me/us. (3) The Company will not accept any claims for loss in relation to the non-receipt of this form being sent by facsimile. A facsimile transmission report produced by the policyowner shall not be a valid proof that the instructions were being sent or not. (4) The Company shall not be liable for any consequential or indirect losses resulting from any delay or failure to perform its obligations or any losses, damages or costs resulting therefrom. Moreover, the Company shall not be held responsible for any consequences resulting whether directly or indirectly from any uncontrollable events or any other circumstances beyond the Company's control. (5) The Company shall have the right to update this form from time to time and to accept or reject the form submitted by me/us if I/we fail to fulfill the Company's requirements.

謹此聲明本人 / 吾等清楚明白及同意下列各項：(1) 貴公司獲授權及指示接納及執行本人 / 吾等就轉換 / 贖回 / 提取申請而發出的傳真指示。然而，貴公司可酌情拒絕執行任何以傳真方式發出的指示，並可要求以另一指定表格發出的正本書面指示。(2) 貴公司可倚賴其真誠相信為真確或經由本人 / 吾等簽署而發出的轉換指示並視為定論，並且無須就據之行事而承擔任何責任。(3) 貴公司不會接受任何因傳真送交之表格未能送達而引致之損失或索償。由保單持有人提供的傳真報告並不可作為傳真指示發出與否的證明。(4) 貴公司毋須就延遲或未有履行其義務而導致的直接或非直接損失，或因此而導致的任何損失、損害或費用而承擔責任。此外，貴公司毋須對任何其無法控制的事件或情況所直接或間接導致的後果負責。(5) 貴公司有權隨時更新表格內容，如本人 / 吾等未能符合貴公司的有關規定，貴公司將保留接受或拒絕本人 / 吾等遞交之申請表格的權利。

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 Macao or outside Macao) and any service providers (whether they are located or registered in Macao or outside Macao) 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/our 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 Manulife Personal Information Collection Statement (version 20150119\_M) ("Statement"). I/We understand and agree to the Statement.

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澳門或澳門境外）及任何服務供應商（不論其位於或註冊於澳門或澳門境外）轉移及 / 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 / 吾等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《〈宏利個人資料收集聲明〉(20150119\_M版本)》(「聲明」)。本人 / 吾等清楚明白及同意該聲明之內容。

Signed on this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_  
 簽署日期 \_\_\_\_\_ Day 日 \_\_\_\_\_ Month 月 \_\_\_\_\_ Year 年

Signature of First Policyowner 第一保單持有人簽署           X	Signature of Second Policyowner (if applicable) 第二保單持有人簽署 (如適用)           X
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For Office Use Only 公司專用 S.V. \_\_\_\_\_  Y  N  
 Switching only 轉換  Redemption/ Withdrawal only 贖回/ 提取  Switching & Redemption/ Withdrawal 轉換及贖回/ 提取  
 Checked by 經已核對 \_\_\_\_\_

☞ Please return the completed form to Macao Administration Office, Manulife (International) Limited, Avenida De Almeida Ribeiro No.61, Circle Square, 14 andar A, Macao. 請將填妥的表格寄回澳門新馬路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。