

委任後續保單持有人表格
Nomination of Contingent Owner Form

保單號碼 Policy no _____

受保人 Insured _____

保單持有人 Policyowner _____

後續保單持有人姓名 Name of Contingent Owner (以身份證/護照為準 as shown on ID card/passport)			
身份證/護照號碼 ID card no/Passport no	出生日期 (日/月/年) Date of birth (DD/MM/YYYY)	性別 Sex	與受保人之關係 Relationship with insured

注意事項 Notes

- 後續保單持有人必須為 18 歲或以上。Contingent owner must be aged 18 or above.
- 此申請不適用於(i) 信託形式為未滿 18 歲的受保人持有的保單；(ii)保單持有人為公司或(iii)保單持有人為受保人本人(特定產品除外)。This application is not applicable if (i) the policy is held under trust for insured below the age of 18 years; (ii) the policy is held by a corporation or (iii) the policyowner is the life insured(except specified products).
- 在受保人仍生存及本保單生效期間，只可委任一名後續保單持有人。During the lifetime of the Insured and while this Policy is in force, only one contingent owner can be nominated.
- 已獲委任的後續保單持有人在保單持有人更改保單擁有權後將維持不變。新保單持有人有權重新委任新後續保單持有人。The nominated contingent owner shall remain unchanged when the policyowner changes the ownership of the policy. The new policyowner has the right to re-nominate a new contingent owner.
- 只適用於指定產品。Only applicable for designated products.

聲明 Declaration

本人，即保單持有人，在此確認及聲明 (1) 本人已閱讀及完全明白此表格的內容；(2) 本人已就此申請的影響取得法律或財務意見，及本人確認保單條款之更改未必能完全達到本人的目的，並本人同意解除泰禾人壽保險有限公司 (「泰禾人壽」) 因此申請而可能引起的一切法律責任；及 (3) 泰禾人壽有權全權酌情決定接受或拒絕此申請。

I, the policyowner, do hereby acknowledge and declare that (1) I have read and fully understood the content of this form; (2) I have had the opportunity to obtain my own legal or financial advice on the effect of this application, and acknowledge that the variation of the policy provisions may not be able to serve my own purpose and I agree to release Tahoe Life Insurance Company Limited ("Tahoe Life") from all liabilities which may arise as a result of this application ; and (3) Tahoe Life shall have the right, at its sole discretion, to accept or reject this application.

個人資料收集聲明

1. **目的**：泰禾人壽保險有限公司 / 泰禾保險服務有限公司（「本公司」）就向閣下收集之個人資料（「個人資料」）乃為以下目的使用：

- (i) 處理、管理、落實及實行閣下提交予本公司的本文件或不時提交的任何其他文件中所表明的申請；
- (ii) 提供與本文件和本保單相關的一切服務，包括推廣或改善本公司或其關聯公司提供的有關本次申請的服務或相關服務；
- (iii) 就行政目的與閣下聯絡；
- (iv) 調查、處理及繳付閣下保單的理賠申請；
- (v) 依照在香港特別行政區境內或境外任何法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織的要求，配合調查及作出披露；
- (vi) 將閣下的個人資料發送給任何保險公司聯會或類似組織（「聯會」）以及聯會的任何成員，以供其履行其監管職能及 / 或為保險行業或聯會的任何成員的合理利益所需的其他職能；
- (vii) 統計或精算研究；
- (viii) 其他直接與以上目的相關的目的；

就本公司使用閣下提供的個人資料作宣傳或市場推廣用途，請參閱「**使用個人資料作直接促銷用途**」一節。未能提供所需的個人資料可能導致本公司無法為閣下提供產品及服務、評估閣下的保單申請、處理保單索償、或處理任何閣下提出的要求、查詢或投訴。

2. **轉移**：閣下提供的個人資料將保密處理，惟會因以上所述之目的將此等資料轉移給以下各方：

- (i) 本公司的任何成員公司，包括附屬公司及聯屬公司；
- (ii) 任何其他從事保險、強制性公積金暫行受託人或再保險相關業務的非本公司成員公司；
- (iii) 獲本公司授權以分銷本公司所提供之產品及服務的金融服務中介團體；
- (iv) 提供與閣下的保單有關的索償、調查或其他服務的提供者；
- (v) 現有或不時成立的相關行業協會及聯會；
- (vi) 向閣下提供與本公司產品及服務有關的行政、電訊、電腦、付款、數據處理或其他服務的任何人士（包括代理商、承包商或第三方服務提供者）；
- (vii) 於香港境內或境外任何法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織；
- (viii) 與本公司業務的轉讓或擬議轉讓有關的任何第三方，當中部分受讓方或位於香港境內或境外。
- (ix) 閣下的保險代理人或中介人或介紹人。

3. **查閱**：閣下有權查明本公司持有個人資料的類別、本公司是否持有閣下的個人資料，如持有閣下有權要求查閱本公司持有涉及閣下的個人資料以及要求對該等資料作出更正。閣下可向本公司的資料保障主任提出要求，地址為香港太古城英皇道1111號太古中心一座15樓。本公司有權為處理閣下的個人資料查閱要求而收取合理費用。

使用個人資料作直接促銷用途

除了以上所述的用途，本公司擬把閣下的個人資料包括姓名、聯絡資料、產品及服務組合資料、交易模式及行爲、財務背景及人口統計數據透過郵寄、傳真、電郵、電話及短訊形式用於直接促銷，當中包括以下的服務、產品和類別：(a) 保險、財務及相關服務及產品；(b) 獎賞、年資獎勵或優惠計劃及相關服務和產品；(c) 本公司的聯名合作夥伴提供之服務和產品（有關服務和產品的申請表 / 宣傳單張 / 海報上會提供聯名合作夥伴的名稱，視屬何情況而定）；閣下的個人資料可提供予第三方金融機構、保險公司、醫療機構、電話服務公司、市場營銷或研究服務、獎賞、年資獎勵及優惠計劃服務及 / 或相關服務作直接促銷。

使用閣下的個人資料進行本公司或任何第三方直接促銷前，本公司必須得到閣下的同意及只有在本公司收到閣下的同意後，本公司才可使用或提供閣下的個人資料作直接促銷用途。

閣下將來可以撤回閣下對個人資料作本公司及第三方直接促銷用途的同意書。這項要求可向本公司的資料保障主任提出，地址為香港太古城英皇道1111號太古中心一座15樓。此後，本公司須停止使用閣下的個人資料作直接促銷之用。

個人資料收集聲明的修訂

本公司保留權利可隨時且在無須通知的情況下，修訂本個人資料收集聲明，本公司亦可在本公司的網站或以書面形式知會閣下，閣下因而能得悉本公司如何收集閣下的個人資料、如何使用該資料及轉移該資料的情況。任何有關修訂將在刊登後即時生效。

個人資料收集同意書

透過於下方簽署，本人 / 我們同意，貴公司收集或持有的本人 / 我們的個人資料，無論是本申請書中包含的還是在任何時候以其他方式獲得的，均可：

- (i) 由貴公司依照個人資料收集聲明的規定使用*（除了本人 / 我們於投保申請書「在直接促銷中使用資料」部份，表明本人 / 我們不同意貴公司使用本人 / 我們的個人資料作直接促銷用途外）；
- (ii) 向個人資料收集聲明中所列的各類接收方披露，並且如該等接收方位於香港境外，本人 / 我們同意將本人 / 我們的個人資料發送至香港境外；
- (iii) 由貴公司進行數據配對，而該數據配對的目的乃為製作或核對或可用作對本人 / 我們採取不利行動的數據，又或是該數據配對所產生或核對的數據或可用作對本人 / 我們採取不利行動；
- (iv) 用於設立和維持與本人 / 我們在貴公司投保之保單有關的歷史或記錄。

Personal Information Collection Statement ("PICS")

1. **Purpose:** Among the personal data collected from you to Tahoe Life Insurance Company Limited/Tahoe Insurance Services Limited ("the Company"), it is collected for the purpose of:
 - (i) processing, administering, implementing and effecting the requests indicated in this document or any documents that you may submit to the Company from time to time;
 - (ii) providing all services related to this document and the policy, including promoting or improving such services or related services by the Company or its subsidiaries and affiliates;
 - (iii) communicating with you in relation to the administrative purposes;
 - (iv) investigating, processing and paying claims made under your insurance policy;
 - (v) co-operating with any investigation and meeting any disclosure requirements imposed by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies within or outside Hong Kong Special Administrative Region ("HKSAR");
 - (vi) transferring your personal data to any federation or similar organisation of insurance companies ("Federation") and any members of the Federation to carry out its regulatory functions and/or in the interest of insurance industry or any members;
 - (vii) statistical or actuarial research;
 - (viii) other ancillary purposes which are directly related to the purposes set above.

For using the personal data provided by you for promotional/marketing purposes, please refer to the section titled "Use of Personal Data in Direct Marketing".

The failure of providing the Personal Data by you may result in the Company being unable to provide products and services, assess your policy application, process claims under insurance policies issued by the Company, or process any other requests, enquiries, or complaints from you.
2. **Transfer:** Personal data provided by you to the Company will be kept in confidential but it may be transferred to parties mentioned below for purposes set above:
 - (i) any related company(ies), including subsidiaries or affiliates of the Company;
 - (ii) any other unrelated company carrying on insurance, provisional trustee of mandatory provident fund or reinsurance related business;
 - (iii) financial services intermediaries that are authorised by the Company for the distribution of products and services provided by the Company;
 - (iv) a claims, investigation or other services provider providing services relevant to your insurance policies;
 - (v) relevant industry association and federation that exists or is formed from time to time;
 - (vi) any person (including agents, contractors or third party service providers) who provides administrative, telecommunications, computer, payment, data processing or other services in connection with the operation of the Company's business and provision of products and services to you;
 - (vii) any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies within or outside HKSAR;
 - (viii) any third party in connection with a transfer or potential transfer of all or part of the business of the Company that some of the transferees may be located within or outside of HKSAR.
 - (ix) your insurance agents, intermediaries or referrers.
3. **Access:** You have the right to ascertain what type of personal data the Company holds, whether the Company holds your personal data and, if so, the right to request access to and to request correction of any personal data concerning you held by the Company. Such request can be made to the Data Protection Officer of the Company at 15/F, Cityplaza One, 1111 King's Road, Taikoo Shing, Hong Kong. The Company has the right to charge a reasonable fee for processing a request to access your personal data access request.

Use of Personal Data in Direct Marketing

Apart from the aforementioned purposes, the Company may use your personal data including name, contact details, products and services portfolio information, transaction pattern and behaviour, financial background and demographic data for direct marketing by mail, fax, email, telephone or SMS that may include the following classes of services, products and subjects: (a) insurance, financial and related services and products; (b) reward, loyalty or privileges programmes and related services and products; and (c) services and products offered by the Company's co-branding partners (the names of such co-branding partners can be found in the application form(s) and/or advertising leaflet(s)/poster(s) for the relevant services and products, as the case may be). Your personal data may also be provided to third party providers of financial, insurance, medical/health, call centre, marketing or research services, rewards, loyalty or privileges programme services and/or related services for their use in direct marketing.

Before using your personal data for the purposes of direct marketing conducted by the Company or any third parties indicated in this section, the Company must obtain your consent and only after your consent is received by the Company, the Company may use or provide your personal data for direct marketing purpose.

You may, in future, withdraw your consent to the use of your personal data by the Company and any third parties on direct marketing purposes. Such request can be made to the Data Protection Officer of the Company at 15/F, Cityplaza One, 1111 King's Road, Taikoo Shing, Hong Kong and the Company shall cease to use your personal data for direct marketing purposes.

Amendment to the PICS

The Company reserves the right at any time, with or without notice, amends this PICS which will be found in our website or in writing to notify you how the Company will collect, use and transfers your personal data. Should there be any amendment to this PICS in the future, such amendment will become effective with immediate effect.

Consent to Personal Data Collection

By signing below, I/we consent that my/our personal data collected or held by the Company, whether contained in this application or otherwise obtained at any time may:

- (i) be used by the Company in accordance with the Personal Information Collection Statement* (except I/we indicate that I/we object to the Company using my/our personal data in direct marketing under the section of "Use of Data in Direct Marketing" in application form);
- (ii) be disclosed to the classes of transferees set out in the PICS and to the extent such transferees are located outside of Hong Kong, I/we consent to the transfer of my/our personal data outside of Hong Kong;
- (iii) be subject to a data matching procedure by the Company for the purpose of producing or verifying, or which produces or verifies, data that may be used for the purpose of taking adverse action against me/us;
- (iv) be used to establish and maintain a history of my/our records in relation to any of my/our policy with the Company.

在直接促銷中使用資料 Use of Data in Direct Marketing

貴公司擬把本人 / 我們的個人資料 (如上面「保障個人資料 (私隱) 」部份所述) 用於直接促銷，而貴公司為該用途須獲得本人 / 我們一般的同意 (包括表示不反對) 。就此，本人 / 我們確認以下所有事項*：

The Company may use my/our personal data as mentioned in the above section of "Personal Data (Privacy) Protection" in direct marketing and the Company requires my/our general consent (which includes an indication of no objection) for that purpose. In this connection, I/We acknowledged all of the followings*:

* (以下代表本人 / 我們目前有關於直接促銷的選擇，並取代本人 / 我們在本申請前可能曾給予貴公司的任何有關之選擇)

* (The followings represent my/our present choice (concerning direct marketing) which shall replace any choice I/we may have given to the Company prior to this application.)

本人 / 我們不同意根據以上個人資料收集聲明 (參閱「使用個人資料作直接促銷用途」部份) 為直接促銷之目的而使用和提供本人的個人資料，亦不希望接收任何推廣及直接促銷材料。

I/We, do not agree with the use and provision of my personal data for direct marketing purposes as set out above in the Personal Information Collection Statement (see "Use of Personal Data in Direct Marketing") and do not wish to receive any promotional and direct marketing materials.

簽署日期
(日DD / 月MM / 年YY)

保單持有人簽署
Signature of policyowner

保單持有人聯絡電話
Contact phone number
of policyowner

保單持有人電郵地址
Email address of policyowner

簽署日期
(日DD / 月MM / 年YY)

承讓人簽署(如有)
Signature of assignee (if any)

承讓人聯絡電話
Contact phone number
of assignee

承讓人電郵地址
Email address of assignee

簽署日期
(日DD / 月MM / 年YY)

()
業務顧問簽署及編號
Signature of sales personnel
and code

業務顧問姓名及分行名稱 (如有)
Name of sales personnel and branch name (if any)