

**保單利益提取 / 保單貸款申請表 (非投資相連壽險保單)**  
**Policy Benefit Withdrawal / Loan Application Form (Non-Investment Linked Policy)**

保單號碼 Policy no. \_\_\_\_\_

受保人 Insured \_\_\_\_\_

保單持有人 Policyowner \_\_\_\_\_

**重要事項 Important notes :**

- 請填寫適當部分、在適當方格內加上「√」號，並用正楷填寫。如本申請表上有任何修改，保單持有人 / 承讓人必須在旁加簽。  
Please complete the appropriate section, put a "√" in the appropriate box(es) and complete in BLOCK LETTERS. Any alterations on this form must be countersigned by the policyowner / assignee.
- 以下申請受相關保單條款約束。請參閱「所需文件指引」以便處理閣下的申請。  
The below application is subject to the relevant terms and conditions of the policy. Please refer to the "Document checklist" for documents required to process your request.
- 請選擇以下提取利益 / 保單貸款為「全數 / 最高可貸款額」或「指定金額」，如閣下並沒有填寫「全數 / 最高可貸款額」或「指定金額」，泰禾人壽保險有限公司（「泰禾人壽」或「本公司」）則作全數 / 最高可貸款額提取。倘若閣下同時填寫「全數 / 最高可貸款額」及「指定金額」，本公司則以數目較低者為準。  
Please select the below "Full Amount/Maximum Loan Amount" or "Specified Amount" of benefit withdrawal/loan, if you do not select "Full Amount/Maximum Loan Amount" or "Specified Amount", Tahoe Life Insurance Company Limited ("Tahoe Life" or "the Company") will treat as full amount/maximum loan amount withdrawal. If you select "Full Amount/Maximum Loan Amount" and "Specified Amount" at the same time, the Company will proceed with the transaction of payment whichever is lower.
- 對於設有「每月支取選項」的保單，如保單持有人選擇將保證現金款額 / 非保證週年紅利 / 每月年金金額之選項更改為每月支取，請填妥「每月支取現金款額指示表格」，並依表格上的指示交回所需文件。  
For policy with "Monthly payments option", if Policyowner wants to change the guaranteed cash payment/non-guaranteed annual dividend/monthly annuity payment to monthly withdrawal, please complete and sign the "Monthly Payment of Cash Payments Instruction Form", and please provide the required documents according to the instructions on the form.
- 積存週年紅利 / 保證現金款額 / 年金一經提取將不能復原，有關提取會影響保單的長遠價值，包括但不限於提取金額於日後所衍生之積存利息。此外，於保單終止時可支付之身故賠償、退保利益及期滿利益（如有）將會相應減少。請注意，提取週年紅利會減少未來的非保證每月入息（只適用於優裕年金入息計劃）。  
The withdrawal of accumulated annual dividends / guaranteed cash payment / annuity is irreversible. Such withdrawal will reduce the long-term value of the policy, including but not limited to the reduced accumulated interest derived from the withdrawal amount in the future. Further, death benefit, surrender benefit and maturity benefit (if any) payable upon policy termination will be reduced accordingly. Please note, withdrawal of annual dividends will result in reduction of future non-guaranteed monthly income (only applicable for Prestige Annuity Income Plan).
- 保單持有人可選擇向泰禾人壽申請保單貸款，惟貸款金額不得超過批核貸款時的保證現金價值的 80%。保單之任何欠款會減少退保利益、身故賠償及期滿利益金額（如有），並或會導致保單提前終止。若保單之任何欠款超過保證現金價值，受限於本保單之現行規則下，泰禾人壽有權終止保單，而保單內的所有保障將自動終止，並按保單文件的條款及條件支付剩餘退保利益（如有）予閣下。詳情請參閱保單文件。此外，在年金 / 入息開始日之後，保單持有人不能申請任何保單貸款（適用於優裕年金入息計劃 / 黃金稅悅延期年金計劃）。  
Policyowner may apply for a policy loan from Tahoe Life with an amount not exceeding 80% of the guaranteed cash value available at the time of the policy loan's approval. Any indebtedness of the policy reduces the surrender benefit, death benefit and maturity benefit (if any) and may lead to early termination of the policy. Subject to Company's prevailing rules, Tahoe Life has the right to terminate the policy if any indebtedness of the policy exceeds the guaranteed cash value and all the benefits under the policy will automatically be terminated, and the Company will pay Policyowner the remaining surrender benefit (if any) subject to terms and conditions of the policy document. Please refer to the policy document for details. Further, policyowner is not allowed to apply for policy loan after the annuity/income commencement date (applicable to Prestige Annuity Income Plan / Shinning Years Deferred Annuity Plan).
- 如保單持有人的稅務居民身分有所改變或尚未提供稅務居民的資料，請填寫第三部分「保單持有人的稅務居民身份（自我證明）」。  
If there are any changes in circumstances of tax residency of policyowner or if the policyowner has not yet provided the information of tax residency, please complete part III "Tax residence of Policyowner (Self-certification)".

**第一部分 申請項目 Part I Application item(s)**

<b>A. 保單利益提取 Policy benefit withdrawal</b>			
		<b>全數 Full Amount</b>	<b>指定金額 Specified Amount (保單貨幣 Policy currency)</b>
<input type="checkbox"/>	積存年金 / 保證現金款額及利息 Accumulated Annuity / Guaranteed Cash Payment & interests	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	積存週年紅利及利息 Accumulated Annual Dividends & Interests	<input type="checkbox"/>	<input type="checkbox"/>
<b>B. 貸款 Loan</b>			
		<b>最高可貸款額 Maximum Loan Amount</b>	<b>指定金額 Specified Amount (保單貨幣 Policy currency)</b>
<input type="checkbox"/>	保單貸款 Policy loan	<input type="checkbox"/>	<input type="checkbox"/>

## 第二部分 付款指示 Part II Payment instruction

### 請選擇其中一項付款指示 Please select one of the payment instructions

- 倘若沒有註明付款指示或資料不清晰 / 完整，該款項將以港幣支票形式支付並郵寄至保單持有人的通訊地址。If payment instruction is not specified or information is not clear / complete, the payment will be paid by cheque in Hong Kong dollar and sent to policyowner's correspondence address.

☐ **自動轉賬 By Autopay** (只適用於香港銀行港元戶口及款項將以港幣支付 Only applicable to Hong Kong Dollar bank account and payment will be paid in Hong Kong Dollar)

#### 注意事項 Notes:

- 銀行賬戶持有人姓名必須與保單持有人姓名相同。Bank account holder name must be the same as policyowner's name.
- 請提供賬戶持有人的銀行賬戶證明，而該證明須列出所有銀行賬戶持有人完整姓名及銀行賬號。此外，如屬聯名戶口，請遞交所有賬戶持有人有效身份證明文件。Please provide account holder's bank account proof which shows all account holder full name and account number. Further, if this is a joint account, please provide a valid copy of identity document for all account holder(s).
- 若自動轉賬不成功，銀行戶口不符合規定或未能提供有關證明，該款項將以港幣支票形式支付並郵寄至保單持有人的通訊地址。If the autopay is rejected by your bank, your bank account does not comply with the requirements or relevant proofs could not be provided, the payment will be paid by cheque in Hong Kong dollar and sent to policyowner's correspondence address.

☐ 現時本公司紀錄之自動轉賬戶口 (只適用於銀行賬戶持有人為保單持有人) ; 或  
Current direct debit authorisation bank account in the Company record (only applicable if bank account holder is policyowner); or

☐ 以下指定之香港銀行 (提供銀行賬戶證明，詳情可參閱注意事項 1 及 2) :  
Specified Hong Kong bank account below (Please provide bank account proof, please refer to notes 1 & 2) :

銀行名稱 Bank name \_\_\_\_\_

銀行號碼 Bank no.

分行號碼 Branch no.

戶口號碼 Account no.

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☐ **支票 By cheque** (若沒有選擇支票貨幣，該款項將以港幣支票支付。If no cheque currency is selected, the payment will be paid by cheque in Hong Kong dollar.)

#### 支票貨幣 Cheque currency

☐ 港幣 Hong Kong dollar ☐ 保單貨幣 Policy currency

#### 領取方式 Delivery method

倘若沒有註明領取方式或資料不清晰 / 完整，有關確認信件及支票 (如有) 將郵寄至保單持有人的通訊地址。If delivery method is not specified or information is not clear/complete, the confirmation letters and cheque (if any) will be sent to policyowner's correspondence address.

☐ 郵寄至保單持有人的通訊地址 By mail to the policyowner's correspondence address

☐ 經持牌保險中介人轉遞 Deliver via licensed insurance intermediary

持牌保險中介人姓名

持牌保險中介人牌照號碼

Name of licensed insurance intermediary

Licensed insurance intermediary's license no.

\_\_\_\_\_

\_\_\_\_\_

以下選項只適用於經大新銀行銷售之保單。The following option is applicable to policies sold via Dah Sing Bank only.

☐ 親自到大新銀行領取 Collect in person at Dah Sing Bank \_\_\_\_\_ 分行 Branch

☐ **轉賬至保單 Transfer into policy** (只適用於同一保單持有人的保單 Only applicable to policy of the same policyowner)

如轉賬金額少於第一部分所提取金額/貸款，而沒有註明付款方式，餘額將以港幣支票形式支付予保單持有人。If the transfer amount is lower than the withdrawn amount/loan amount in Part I, and the payment instruction is not specified, the balance will be paid by cheque in Hong Kong dollar to policyowner.

<input type="checkbox"/> 繳付保費及徵費 Premium and levy	保單號碼 Policy no.	<input type="checkbox"/> 金額 Amount _____ <input type="checkbox"/> 所提取金額之總數 Total Withdrawal Amount
<input type="checkbox"/> 繳付保費及徵費 Premium and levy	保單號碼 Policy no.	<input type="checkbox"/> 金額 Amount _____ <input type="checkbox"/> 所提取金額之總數 Total Withdrawal Amount
<input type="checkbox"/> 償還自動保單貸款/保單貸款 Automatic premium loan/Policy loan repayment	保單號碼 Policy no.	<input type="checkbox"/> 金額 Amount _____ <input type="checkbox"/> 所提取金額之總數 Total Withdrawal Amount

☐ 電匯轉賬 By telegraph transfer (款項將以保單貨幣支付 Payment will be paid in policy currency)

## 注意事項 Notes:

- 銀行賬戶持有人姓名必須與保單持有人姓名相同。 Bank account holder name must be the same as policyowner's name.
- 請提供賬戶持有人的銀行賬戶證明，而該證明須列出所有銀行賬戶持有人完整姓名及銀行賬號。此外，請遞交所有賬戶持有人有效身份證明文件。 Please provide account holder's bank account proof which shows all account holder full name and account number. Also, please provide valid copy of identity document for all account holder(s).
- 請提供銀行賬戶持有人於銀行之登記地址(如與於本公司記錄不同) Please provide account holder's registered address with bank (if it is different from our Company's records)
- 款項將以保單貨幣支付。保單持有人需支付兩地銀行手續費，有關手續費將於款項中直接扣除。若電匯不成功，閣下仍需支付有關手續費。 The payment will be paid in policy currency. Policyowner is required to pay all bank charges. All related charges will be deducted from the payment. In the case of an unsuccessful transfer, you are still required to pay all related charges.

☐ 電匯轉賬至海外銀行 (提供銀行賬戶證明，詳情可參閱注意事項 1 及 2，及不適用於中國內地銀行)

Transfer to overseas bank (Please provide bank account proof. Please refer to notes 1 & 2 and not applicable to banks in Mainland China)

銀行名稱 Bank name \_\_\_\_\_

銀行地址 Bank address \_\_\_\_\_

賬戶號碼 Account no. \_\_\_\_\_

代碼 Swift code \_\_\_\_\_ 編號 IBAN \_\_\_\_\_

中轉銀行名稱 Intermediary bank name \_\_\_\_\_

中轉銀行代碼 Intermediary bank swift code \_\_\_\_\_

銀行賬戶持有人地址 Bank account holder address \_\_\_\_\_

## 第三部分 保單持有人的稅務居民身份 (自我證明) Part III Tax residence of Policyowner (Self-certification)

如保單持有人的稅務居民身份有所改變或尚未提供稅務居民的資料，請填寫此部分。 If there are any changes in circumstances of tax residency of policyowner or if the policyowner has not yet provided the information of tax residency, please complete this part.

- 居留司法管轄區及稅務編號或具有等同功能的識別編號 (以下簡稱「稅務編號」)  
Jurisdiction of Residence and Taxpayer Identification Number or its Functional Equivalent ("TIN")
- 提供以下資料，列明 (a) 帳戶持有人\*的居留司法管轄區，亦即帳戶持有人\*的稅務管轄區 (香港包括在內) 及 (b) 該居留司法管轄區發給帳戶持有人\*的稅務編號。列出所有 (不限於 3 個) 居留司法管轄區。 Complete the following table indicating (a) the jurisdiction of residence (including Hong Kong) where the account holder\* is a resident for tax purposes and (b) the account holder's\* TIN for each jurisdiction indicated. Indicate all (not restricted to three) jurisdictions of residence.
- 如帳戶持有人\*是香港稅務居民，稅務編號是其香港身份證號碼。如沒有提供稅務編號，必須填寫合適的理由：

理由 A – 帳戶持有人\*的居留司法管轄區並沒有向其居民發出稅務編號。

理由 B – 帳戶持有人\*不能取得稅務編號。如選取這一理由，解釋帳戶持有人\*不能取得稅務編號的原因。

理由 C – 帳戶持有人\*毋須提供稅務編號。居留司法管轄區的主管機關不需要帳戶持有人\*披露稅務編號。

If the account holder\* is a tax resident of Hong Kong, the TIN is the Hong Kong Identity Card Number. If a TIN is unavailable, provide the appropriate reason A, B or C:

Reason A – The 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. Explain why the account holder\* is unable to obtain a TIN if you have selected this reason.

Reason C – TIN is not required. Select this reason only if the authorities of the jurisdiction of residence do not require the TIN to be disclosed

居留司法管轄區 Jurisdiction of Residence	稅務編號 TIN	如沒有提供稅務編號，填寫理由 A、B 或 C Enter Reason A, B or C if no TIN is available	如選取理由 B，解釋帳戶持有人不能取得稅務編號的原因 Explain why the account holder is unable to obtain a TIN if you have selected Reason B	稅務居住地生效日期 Effective date of tax residence	**稅務居住地結束日期 End date of tax residence
(1)					
(2)					
(3)					

\*「帳戶持有人」指「保單持有人」 "The account holder" is "Policyowner".

\*\*如沒有填寫「稅務居住地結束日期」，在每個報告年度稅務局會繼續將閣下最新的居住地區資料轉交到相關的稅務管轄區。

If the "End date of tax residence" is not specified your latest information for that jurisdiction of residence will continue to be transmitted by the Inland Revenue Department every reporting year to the relevant jurisdiction.

**聲明及協議：**

本人明白及同意下列各項：

- (1) 若此保單以信託形式為18歲以下的受保人持有，本人所提取之利益，將會用於受保人之絕對利益。
- (2) 本人為此保單之合法持有人，並未曾把此保單轉讓或轉移予任何人士，本人亦未有破產、申請或被申請破產。
- (3) 手續一經辦理，本公司將不會接受取消相關申請。
- (4) 此貸款按現行之保單貸款利率計算利息。除保單合約特別指明外，現時保單貸款利息之利率為每年8.00%（在1990年3月1日以前發出之保單，其保單貸款利息之利率為每年10.00%）。保單貸款利息之利率由泰禾人壽不時釐定並會隨時更改。貸款利息將自貸款批核日起每日累計。該利息將成為此保單之負債。貸款利息應於每年保單週年日清還，直至全數償還此貸款為止。所有到期未繳付之利息將於保單週年日加於貸款之總額，與貸款之條件相同，並以相同息率計算。本人可以書面形式要求泰禾人壽發出一份最新的貸款金額重估連同預期保單失效年份之文件。
- (5) 如任何款項的貨幣不是以保單貨幣支付，該保單利益款項將會受泰禾人壽不時釐定當時保單貨幣對支付貨幣的匯率而改變。匯率之波動會對款額構成影響。本人同時亦須承受利率風險因匯率會不時波動。

**Declarations and agreements:**

I UNDERSTAND AND AGREE THAT

- (1) The withdrawn benefits are for the absolute benefit of the insured if the policy is held under trust for an insured below the age of 18 years.
- (2) I am legally entitled to the benefits under the policy which have not been assigned or transferred to any other parties, and that no proceedings in bankruptcy have been instituted by or against me.
- (3) Once the request is processed, reversal of transaction cannot be arranged.
- (4) The said loan shall bear interest at the prevailing interest rate on policy loan. The current interest rate on policy loan is at 8.00% per annum or unless specified in policy contract (for those policies which were issued before 1 March 1990, the interest rate on policy loan is at 10.00% per annum). The interest rate on policy loan is determined by Tahoe Life from time to time and is subject to change. The interest on policy loan shall be calculated from approval date of the said loan application by Tahoe Life. The interest shall accrue daily and shall constitute an indebtedness to Tahoe Life against this policy as it accrues. Interest shall be repaid on each policy anniversary subsequent to the date of loan until the said loan is repaid. Any unpaid interest when due shall be added to the said loan on the policy anniversary date and bear interest at the same rate and on the same conditions. I may request to receive an updated reprojected of loan amount with the expected lapse year by sending a written instruction to Tahoe Life.
- (5) Should the payments be settled in currency other than the policy currency, the benefit payments would be subject to change according to the prevailing exchange rate of policy currency to payment currency to be determined by Tahoe Life from time to time. The fluctuation in exchange rates may have impact on the amount of payments. I am also subject to exchange rate risks as exchange rate fluctuates from time to time.

**收取個人壽險保費徵費**

本人 / 我們在此確認：泰禾人壽，為一家獲授權的保險公司，按香港保險業監管局（下稱「保監局」）的要求及授權向每位保單持有人所持有的新造或現行有效保單徵收徵費，有關徵費將按照訂明安排匯付予保監局。保監局可以根據相關條例，將有關的徵費欠款作為民事債項向相關的保單持有人追討欠款，並有機會徵收罰款。有關徵費的詳情，請瀏覽 [https://www.tahoelife.com.hk/tl/doc/Levy\\_TC.pdf](https://www.tahoelife.com.hk/tl/doc/Levy_TC.pdf) 或致電 (852) 3767 8777。

**Collection of Premium Levy on Individual Life Insurance Policy**

I / We hereby acknowledge that: Tahoe Life, as an authorised insurer, is statutorily required to collect premium levy ("Levy") on any new or in-force policy from policy owner on behalf of the Insurance Authority of Hong Kong ("IA") and would be remitted in accordance with prescribed arrangement to the IA. IA may take legal proceedings against policy owners in respect of any outstanding Levy as a civil debt and may impose pecuniary penalty according to the relevant regulations. For further information, please visit [https://www.tahoelife.com.hk/tl/doc/Levy\\_EN.pdf](https://www.tahoelife.com.hk/tl/doc/Levy_EN.pdf) or contact: (852) 3767 8777.

**《稅務條例》的規定**

泰禾人壽必須遵從《稅務條例》（第112章）的下列規定，以協助香港特別行政區政府稅務局（「稅務局」）進行自動交換某些財務帳戶資料：

- (1) 將某些帳戶識別為「不獲豁免財務帳戶」；
- (2) 識別就稅務而言，持有不獲豁免財務帳戶的個人和某些持有不獲豁免財務帳戶的實體所屬的居留司法管轄區；
- (3) 確定某些持有不獲豁免財務帳戶的實體的狀況為「被動非財務實體」，並識別其控權人就稅務而言的居留司法管轄區；
- (4) 收集有關不獲豁免財務帳戶的某些資料（「所需資料」）；及
- (5) 向稅務局提供某些所需資料（以上統稱為「自動交換資料要求」）。

本人（申請人 / 持有人）知悉及同意，泰禾人壽可根據《稅務條例》有關交換財務帳戶資料的法律條文，（a）收集本申請書所載資料並可備存作自動交換財務帳戶資料用途及（b）把該等資料和關於申請人 / 持有人及任何須申報帳戶的資料向稅務局申報，從而把資料轉交到申請人 / 持有人的居留司法管轄區的稅務當局。

本人（申請人 / 持有人）承諾，如情況有所改變，以致影響本申請書所述的申請人 / 持有人的稅務居民身分，或引致本申請書所載的資料不正確，本人會通知泰禾人壽，並會在情況發生改變後30個曆日內，向泰禾人壽提交一份已適當更新的自我證明表格。

本人（申請人 / 持有人）同意遵從泰禾人壽為了符合「自動交換資料要求」而提出的請求。

本人（申請人 / 持有人）聲明就本人所知所信，本申請書內所填報的所有資料和聲明均屬真實、正確和完備。

警告：根據《稅務條例》第80(2E)條，如任何人在作出須自我證明時，在明知一項陳述在要項上屬具誤導性、虛假或不正確，或罔顧一項陳述是否在要項上屬具誤導性、虛假或不正確下，作出該項陳述，即屬犯罪。一經定罪，可處第3級（即港幣10,000元）罰款。

**REQUIREMENTS OF THE INLAND REVENUE ORDINANCE**

Tahoe Life must comply with the following requirements of the Inland Revenue Ordinance (Cap. 112) to facilitate the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region ("IRD") in implementing automatic exchange of certain financial account information as provided for thereunder:

- (1) to identify certain accounts as "non-excluded financial accounts" ("NEFAs");
- (2) to identify the jurisdiction(s) in which NEFA-holding individuals and certain NEFA-holding entities reside for tax purposes;
- (3) to determine the status of certain NEFA-holding entities as "passive NFEs" and identify the jurisdiction(s) in which their controlling persons reside for tax purposes;

- (4) to collect certain information on NEFAs ("Required Information"); and  
 (5) to furnish certain Required Information to the IRD (collectively, the "AEOI requirements").

I, the applicant / owner, acknowledge and agree that (a) the information contained in this form is collected and may be kept by Tahoe Life for the purpose of automatic exchange of financial account information, and (b) such information and information regarding the applicant / owner and any reportable account(s) may be reported by Tahoe Life to the IRD and exchanged with the tax authorities of another jurisdiction or jurisdictions in which the applicant / owner may be resident for tax purposes, pursuant to the legal provisions for exchange of financial account information provided under the Inland Revenue Ordinance.

I, the applicant / owner, undertake to advise Tahoe Life of any change in circumstances which affects my tax residency status of the applicant/owner or causes the information contained herein to become incorrect, and to provide Tahoe Life with a suitably updated self-certification form within 30 calendar days of such change in circumstances.

I, the applicant / owner, agree to comply with requests made by Tahoe Life to comply with the AEOI requirements.

I, the applicant / owner, declare that the information given and statements made in this form are, to the best of my knowledge and belief, true, correct and complete.

WARNING: It is an offence under section 80(2E) of the Inland Revenue Ordinance if any person, in making a self-certification, makes a statement that is misleading, false or incorrect in a material particular AND knows, or is reckless as to whether, the statement is misleading, false or incorrect in a material particular. A person who commits the offence is liable on conviction to a fine at level 3 (i.e. HKD10,000).

#### 個人資料收集及使用

本人 / 我們確認本人 / 我們已閱讀及明白泰禾人壽之個人資料收集聲明 (「泰禾人壽個人資料收集聲明」)。

本人 / 我們聲明及同意在本表格所載或泰禾人壽不時以任何方法收集所得、編製或持有的任何個人資料及關於本人 / 我們或本人 / 我們的保單或投資的其他資料，可根據泰禾人壽個人資料收集聲明收集及使用。

本人 / 我們特此確認並同意泰禾人壽根據泰禾人壽個人資料收集聲明使用及轉移本人 / 我們的個人資料。泰禾人壽個人資料收集聲明的最新版本可於以下網址下載：[www.tahoelife.com.hk](http://www.tahoelife.com.hk)，及可向泰禾人壽索取。

#### Personal data collection and use

I / We confirm that I / we have read and understood the Tahoe Life Personal Information Collection Statement (the "Tahoe Life PICS").

I / We declare and agree that any personal data and other information relating to me / us or my / our policy(ies) or investments contained in this form or collected, compiled or held by Tahoe Life by any means from time to time may be collected and utilised in accordance with the Tahoe Life PICS.

I / We hereby give my / our acknowledgement and agree to the use and transfer of my / our personal data by the Company in accordance with the Tahoe Life PICS. The latest version of the Tahoe Life PICS is available for download from the website: [www.tahoelife.com.hk](http://www.tahoelife.com.hk), and is made available upon request.

☐ 本人 / 我們不同意根據泰禾人壽個人資料收集聲明 (參閱「為直接促銷目的而使用個人資料」部分) 為直接促銷之目的而使用和提供本人 / 我們的個人資料，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 / our personal data for direct marketing purposes as set out in the Tahoe Life PICS (see "Use of Personal Data for Direct Marketing Purposes") and do not wish to receive any promotional and direct marketing materials.

本人 / 我們謹此聲明及同意：上列各項資料，據本人 / 我們所知均屬完全及真實無訛。

I / We HEREBY DECLARE AND AGREE THAT: all the information stated above are to the best of my / our knowledge and belief complete and true.

保單持有人簽署# Signature of policyowner#	簽署日期 Sign date ( 日 DD / 月 MM / 年 YYYY )

保單持有人聯絡電話* Contact phone no. of policyowner*	保單持有人電郵* Email address of policyowner*
* 如聯絡電話及 / 或電郵與本公司的記錄不符，本公司將會自動更新有關記錄 If the contact phone no. and/or email address do/does not match our Company's records, the Company will update the relevant records automatically	

承讓人 (如有) 簽署# Signature of assignee (if any)#	簽署日期 Sign date ( 日 DD / 月 MM / 年 YYYY )

持牌保險中介人簽署、牌照類別、牌照號碼及保險經紀公司蓋印(如適用) Signature of licensed insurance intermediary, type of license, license no. and stamp of broker company (if applicable)	持牌保險中介人姓名及分行名稱 (如有) Name of licensed insurance intermediary and branch name (if any)

#保單持有人及承讓人 (如有) 簽署樣式必須與本公司記錄一致

Signature of policyowner and assignee (if any) must be consistent with our Company's records

有關詞彙的對應用語，請瀏覽本公司網頁 [https://www.tahoelife.com.hk/tl/tc/customer\\_supports/glossary](https://www.tahoelife.com.hk/tl/tc/customer_supports/glossary) 中的「保險詞彙對照表」

Please refer to the "Glossary Table for Insurance Terminology" in the Company Website

[https://www.tahoelife.com.hk/tl/en/customer\\_supports/glossary](https://www.tahoelife.com.hk/tl/en/customer_supports/glossary) for corresponding terminologies

### 所需文件指引 Document checklist

- 1 保單持有人及承讓人（如有）必須遞交有效身份證明文件副本（如果您從未遞交身份證明文件或已過期）。  
Policyowner and assignee (if any) MUST provide a copy of valid identity document (if you have not submitted the identity document or it has expired).
- 2 若保單經電話和 / 或直銷渠道購買，持有人需於身份證明文件副本上加上聲明字告「本人現確認此簽署作為日後簽署式樣」及簽署作實。  
If policy is purchased through direct and / or telemarketing channel, please provide owner's identity document copy with declaration "I confirm this signature as the future signature specimen" and signed in copy of identity document.
- 3 保單持有人之銀行賬戶證明副本（銀行存摺或銀行結單等），而該證明須列出所有銀行賬戶持有人完整姓名及銀行賬號（如選用自動轉賬為付款指示）。此外，請提供所有銀行賬戶持有人有效身份證明文件副本。Copy of the policyowner's bank account proof (such as bankbook, bank statement, etc.) which shows full name of the account holder and account number (if autopay is selected as payment instruction). Also, please provide copy of valid identity document for all account holders.
- 4 若保單持有人及承讓人（如有）之住址、身份證 / 護照或電話號碼有任何一項並不屬於香港境內，請填寫第三部分（如果您從未遞交「自我證明表格」或所提供的資料有任何變更）。  
If any of the residential or correspondence address, Identity document / passport or telephone number of policyowner and assignee (if any) is non-Hong Kong, please complete part III (if you have not submitted "Self- Certification Form" or any change in information).
- 5 「海外納稅申報與預扣責任聲明書」（若保單持有人及承讓人（如有）是美國公民或居民或擁有美國人特徵如電話號碼 / 地址等）（如果您從未遞交「海外納稅申報與預扣責任聲明書」或所提供的資料有任何變更）。根據《海外帳戶稅收合規法案》適用規定的要求，保單持有人如需更新任何有關國籍、稅務狀況的資料及其他資料，請瀏覽本公司網址 [www.tahoelife.com.hk](http://www.tahoelife.com.hk) 細閱有關《外國帳戶稅務合規法案》（『FATCA』）概要及下載表格「海外納稅申報與預扣責任聲明書」，填妥後交回本公司。  
Full completion of "Foreign Tax Reporting and Withholding Obligation and Declaration Form" (If the policyowner and assignee (if any) is a US person or holds US indicia e.g. telephone number / address, etc.) (if you have not submitted "Foreign Tax Reporting and Withholding Obligation and Declaration Form" or any change in information). For any updating of policyowner information about nationality, tax status and others in accordance with the applicable requirements under the Foreign Account Tax Compliance Act, please visit the Company website [www.tahoelife.com.hk](http://www.tahoelife.com.hk) to read "Foreign Account Tax Compliance Act (FATCA) overview" and download the "Foreign Tax Reporting and Withholding Obligation Declaration Form" for completion and return to the Company.
- 6 本公司可能會按個別個案情況要求遞交額外資料 / 文件。  
The Company may request for the submission of extra information / documents on a case-by-case basis.