



Application/Policy Number 投保書/保單編號：

Large Amount Supplement 大額附表

The “Company” or “AXA”
“本公司”、“貴公司”或“AXA 安盛”：

AXA China Region Insurance Company
(Bermuda) Limited (Incorporated in Bermuda
with limited liability)
安盛保險(百慕達)有限公司
(於百慕達註冊成立的有限公司) /
AXA China Region Insurance Company Limited
安盛金融有限公司

Important Notes:

1. This form is to be filled in BLOCK LETTERS.
2. The original of this form and supporting documents submitted will not be returned.
3. Please do not sign on blank form.

重要事項：

1. 此表格應以正楷填寫。
2. 所遞交之表格正本及所需文件將不獲退還。
3. 請勿在空白表格上簽署。

Currency used throughout this form (Please put a “✓” in the appropriate box)
適用於此表格的貨幣(請在適當方格內加上「✓」號)

☐ HKD 港元 ☐ USD 美元 ☐ RMB 人民幣 ☐ Other (Please specify): 其他(請列明): _____

1. Personal Details and Policy Information 個人及保單資料

Name of Proposed Insured/Insured:
建議被保人/被保人姓名：

Occupation and title of Proposed Insured/Insured:
建議被保人/被保人職業及職位：

Name of Proposed Owner/Owner:
建議持有人/持有人姓名：

Occupation and title of Proposed Owner/Owner:
建議持有人/持有人職業及職位：

Name of Payor (If other than Proposed Owner/Owner):
付款人姓名(如非建議持有人/持有人)：

Occupation and title of Payor
(If other than Proposed Owner/Owner):
付款人職業及職位(如非建議持有人/持有人)：

Relationship of Payor to Proposed Insured/Insured:
付款人與建議被保人/被保人的關係：

Purpose of Insurance (Please put a “✓” in the appropriate box)
投保目的(請在適當方格內加上「✓」號)

(a) Personal Customer 個人客戶	<input type="checkbox"/> Family Protection 家庭保障	<input type="checkbox"/> Estate Planning 遺產規劃	<input type="checkbox"/> Income Replacement 收入取代	<input type="checkbox"/> Retirement Planning 退休計劃
(b) Business Customer 公司客戶	<input type="checkbox"/> Keyperson (Keyman) Insurance 要員保險	<input type="checkbox"/> Stock Repurchase 購回股份	<input type="checkbox"/> Partnership/Shareholder 合夥人/股東	<input type="checkbox"/> Loan Protection 借貸保障
<input type="checkbox"/> Others (Please give details): 其他(請詳述): _____				

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Please give details of all insurance in force, or currently applying, or concurrent applications, for the Proposed Insured/Insured.

請提供建議被保人 / 被保人所有已生效，或在申請中，或同時申請之保險詳情。

If you need more space, please use section 5 "Additional Information".

如有需要，可於第五部分「額外資料」繼續填寫。

Application Status (Please list all policies) 申請狀況 (請列出所有保單)	Insurance Company Name 承保公司名稱	Policy Type (Life, Critical Illness etc.) 保險類型 (人壽、嚴重疾病等)	Sum Insured/Protection Amount/Notional Amount 投保金額 / 保障金額 / 名義金額	Reason for Cover 投保原因
In Force Policy - please state date of policy issuance 已生效保險 - 請提供保單 簽發日期				
Currently Applying 在申請中				
Concurrent Applications# 同時申請 #				

If there are concurrent applications, please confirm the total sum insured to be placed in force:

如有同時申請的其他保險公司之保障，請確認最終將生效之總投保額：

2. Declaration by Proposed Insured/Insured/Proposed Owner/Owner/Payor (If other than Proposed Owner/Owner)

建議被保人 / 被保人 / 建議持有人 / 持有人 / 付款人 (如非建議持有人 / 持有人) 聲明

Please put a "✓" in the appropriate box
請在適當方格內加上「✓」號

What are your sources of wealth for insurance
premiums? (Tick one or more)
您支付保費的財富來源為：(可選多於一項)

- | | |
|--|--|
| <input type="checkbox"/> Proposed Insured/Insured
建議被保人 / 被保人 | <input type="checkbox"/> Proposed Insured/Insured
建議被保人 / 被保人 |
| <input type="checkbox"/> Proposed Owner/Owner
建議持有人 / 持有人 | <input type="checkbox"/> Proposed Owner/Owner
建議持有人 / 持有人 |
| <input type="checkbox"/> Payor (If other than Proposed Owner/
Owner)
付款人 (如非建議持有人 / 持有人) | <input type="checkbox"/> Payor (If other than Proposed Owner/
Owner)
付款人 (如非建議持有人 / 持有人) |
| <input type="checkbox"/> Salary Income/Bonus
薪金收入 / 獎金花紅 | <input type="checkbox"/> Salary Income/Bonus
薪金收入 / 獎金花紅 |
| <input type="checkbox"/> Rental Income
租金收入 | <input type="checkbox"/> Rental Income
租金收入 |
| <input type="checkbox"/> Accumulated Savings
累積儲蓄 | <input type="checkbox"/> Accumulated Savings
累積儲蓄 |
| <input type="checkbox"/> Investment return/ongoing investment
income
投資回報 / 持續投資收入 | <input type="checkbox"/> Investment return/ongoing investment
income
投資回報 / 持續投資收入 |
| <input type="checkbox"/> Pension Fund/Ongoing pension Income
& previous occupation:
退休金 / 持續退休金收入及退休前職業： | <input type="checkbox"/> Pension Fund/Ongoing pension
Income & previous occupation:
退休金 / 持續退休金收入及退休前職業： |
| <input type="checkbox"/> Loan
貸款 | <input type="checkbox"/> Loan
貸款 |
| <input type="checkbox"/> Business earning
生意盈利 | <input type="checkbox"/> Business earning
生意盈利 |
| <input type="checkbox"/> Others (If financially depends on others,
please provide relationship, occupation
& title):
其他 (如經濟需要他人資助，請提供與建議
持有人關係、其職業及職位)： | <input type="checkbox"/> Others (If financially depends on
others, please provide relationship,
occupation & title):
其他 (如經濟需要他人資助，請提供與建
議持有人關係、其職業及職位)： |

2.1 Income

收入

Source of Income for the past 2 years (Including part time job)
最近兩年的收入來源 (包括兼職工作)

	Year 20____ 20____年	Year 20____ 20____年	Year 20____ 20____年	Year 20____ 20____年
Earned Income 入息性收入				
Annual Salary 年薪				
Guaranteed Commissions & Bonus 保證佣金及花紅				
Other Earned Income (Please specify) 其他入息性收入 (請列明)				
Unearned Income 非入息性收入				
Investment Income 投資收益				
Property Rental Income 物業租金收益				
Interest from Bank Deposit 銀行存款利息				
Dividend from Shares 股份所得紅利				
Other Unearned Income (Please specify) 其他非入息性收入 (請列明)				
Total Income (Earned and Unearned) 總收入 (入息性及非入息性)				

2.2 Expenses

支出

Expenses for the past 2 years
最近兩年的支出

	Year 20____ 20____年	Year 20____ 20____年	Year 20____ 20____年	Year 20____ 20____年
Rental Expenses 租金支出				
Household/Utility Expenses 家庭 / 日常開支				
Personal Expenses 個人支出				
Retirement Fund Contribution 退休基金供款				
Other Expenses (Please specify) 其他支出 (請列明)				
Total Expenses 總支出				

2.3 Assets

資產

Residential Property

住宅物業

Property Address
物業地址

Rented or Purchased (Please specify)
租用或自置 (請列明)

Purchased – Purchase Price
自置 - 購買金額

Purchased – Purchase Date
自置 - 購買日期

Outstanding Mortgage Amount and Term
尚欠按揭金額及尚餘借貸年期

Current Estimated Value
現時估計價值

% of Ownership
業權百分比

Other Property 1

其他物業 1

Property Address
物業地址

Purchase Price
購買金額

Purchase Date
購買日期

Outstanding Mortgage Amount and Term
尚欠按揭金額及尚餘借貸年期

Current Estimated Value
現時估計價值

% of Ownership
業權百分比

Other Property 2

其他物業 2

Property Address
物業地址

Purchase Price
購買金額

Purchase Date
購買日期

Outstanding Mortgage Amount and Term
尚欠按揭金額及尚餘借貸年期

Current Estimated Value
現時估計價值

% of Ownership
業權百分比

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Other Assets 其他資產

Existing Cash Flow
(Including Cash on Hand and Deposit in Bank)
現有流動資金總值 (包括現金及銀行存款)

Shares/Stocks/Bonds
股份 / 股票 / 債券

Business Equity
業務持股權

Value of Other Assets
其他資產總值

i) Asset Detail:
資產詳情:

ii) Value:
價值:

Total Assets
總資產

2.4 Liabilities 負債

Total Outstanding Personal Loan Amount
and Term
未償還之私人貸款總額及年期

Overdraft
透支

Other Liabilities (Please specify)
其他負債 (請列明)

Total Liabilities
總負債

2.5 Other Relevant Details 其他有關資料

At this time, do you have any undischarged
bankruptcy?
現時您是否有未償清的破產債務?

Do you have any banking relationship with
any private bank, priority/premier division of
banks?
您有否於任何私人銀行、銀行優先、優越理財
部開立戶口?
If "yes", please give name of bank,
relationship years and type of account.
如「有」, 請註明銀行名稱、開立年期及戶口類
別。

3. Declaration for Business Owner (Applicable to Business Customer or Personal Customer as a Business Owner) 業務持有人聲明 (適用於公司客戶或為業務持有人的個人客戶)

Business Owner Details

業務持有人資料

Please put a "✓" in the appropriate box
請在適當方格內加上「✓」號

☐ Proposed Insured/Insured
建議被保人 / 被保人

☐ Proposed Owner/Owner
建議持有人 / 持有人

☐ Payor (If other than Proposed Owner/
Owner)
付款人 (如非建議持有人 / 持有人)

☐ Proposed Insured/Insured
建議被保人 / 被保人

☐ Proposed Owner/Owner
建議持有人 / 持有人

☐ Payor (If other than Proposed Owner/
Owner)
付款人 (如非建議持有人 / 持有人)

Company Name and Nature of Business
公司名稱及業務性質

Years of Company in Business
公司成立之年期

Is the Company/Business Incorporated?
公司是否已經註冊?
If "yes", what was the
Date of Incorporation?
如「是」, 註冊日期為?

No. of Employees (full time)
員工數目 (全職)

Are you a Shareholder or Partner in the
Company?
您是否公司之股東或合夥人?
If "yes", please state the percentage of share
owned by yourself.
如「是」, 請說明所佔之公司股份。

Please give details of company performance over the last 2 years

請提供公司最近兩年的業績資料

	Year 20____ 20____年	Year 20____ 20____年	Year 20____ 20____年	Year 20____ 20____年
Turnover 生意額	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gross Profit 毛利	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Net Profit 純利	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Liabilities 總負債	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Assets 資產總值	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Declaration for Business Customer (If more than one business reason applies, please complete all relevant sections) 公司客戶聲明 (如有多個商業目的，請完成所有相關的部分)

i) For Keyperson (Keyman) Insurance 要員保險

Please give reasons why the Proposed Insured/Insured is considered to be valuable to the company e.g. position in company, duties, special skills, knowledge, expertise, qualifications etc.

請提供建議被保人 / 被保人為公司要員的理由，例如公司職位、職務、特殊技能、專業知識、專長及資格等。

How was the Sum Insured calculated?
如何計算出保額？

What proportion of business net profit can be directly attributed to the Proposed Insured/Insured?
建議被保人 / 被保人對公司純利之直接貢獻比例？

Total value of the Proposed Insured/Insured's current remuneration. (Please submit income tax return for reference)
請列出建議被保人 / 被保人現時之薪酬。(請遞交入息稅申報書以作參考)

Please give details of any proposed or in force cover for all other keypersons.
請提供公司其他要員之在投保或已生效的保障詳情。

ii) For Partnership/Shareholder Insurance 合夥人 / 股東保障

What financial loss would arise in the event of death of the Proposed Insured/Insured?
如建議被保人 / 被保人去世，公司將會有甚麼財務損失？

Have all shareholders/partners been covered by insurance policy (ies)? If yes, please give details.
是否所有股東 / 合夥人均已投保？如是，請詳述之。

What is the current valuation on the shares/partnership? (Please submit Buy & Sell Agreement and current official valuation report for reference)
公司股份 / 合夥資產現值多少？(請遞交買賣協議書及現時估值報告以作參考)

iii) For Business Loan Protection (Please submit Loan Agreement for reference) 商業借貸保障 (請遞交貸款合約以作參考)

Name of Lender
貸款人姓名：

Loan Amount
貸款額：

Repayment Period
還款期：

Purpose of the Loan
借貸目的：

Commencement Date of the Loan
借貸日期：

Are there joint/several Guarantees? If yes, please provide details of other persons and their percentage share of loan liability.
是否個別及連帶責任擔保？如是，請提供其餘貸款人之詳情及承擔的貸款百分比。

Is this insurance a requirement of the lender in providing the loan?
是次投保申請是否貸款人發放貸款的必要條件？

5. Additional Information 額外資料

Please use this space to provide us with any additional financial information relevant to the application.
請於此部份提供任何有關投保申請的額外財務資料。

6. Declaration and Authorisation 聲明及授權

I, on behalf of myself and other persons referred to in this application (hereinafter referred to as “We” or “Our”), acknowledge that this form is supplemental to the application for insurance, change or reinstatement (the “Application Form”) in relation to the above Application No./Policy No. signed by me/us. I agree and confirm that (1) to the best of my knowledge and belief the above statements and answers to all questions are true and complete; (2) We have not had any change in material facts and/or medical consultation since the date I/We signed the Application Form of the above mentioned application; (3) the declarations, agreements and authorisations made by me/us under the Declaration & Authorisation Section and Personal Information Collection Statement Section of the Application Form shall also apply to this form; and (4) this statement shall form the basis and become a part of the policy to be issued/reinstated or issued by the Company.

本人，代表本人及其他在此投保申請提及之人士（下稱「我們」）確認此表格補充本人 / 我們就有關上述投保書編號 / 保單編號已簽署的投保、保單更改或保單復效申請書（「申請書」）。本人同意及確認 (1) 上述一切陳述及問題的所有答案，就本人所知所信，均為事實之全部及確實無訛；(2) 自簽署上述申請書，我們之重要事項並無轉變，亦沒有接受任何醫療診治；(3) 載於申請書上聲明及授權部份及收集個人資料的聲明部份內的聲明、協議及授權均適用於此表格；及 (4) 此聲明將作為貴公司發出 / 復效的保單的根據，並作為保單一部份。

I/We also agree to provide additional documentary evidence in support of the above financial information as and when requested by your Company.

本人 / 我們亦同意會因應貴公司要求而提供支持上述財務資料之額外證明文件。

Signature of Proposed Insured/Insured (If aged 18 or above) 建議被保人 / 被保人簽署 (如十八歲或以上)	Date Signed (YYYY/MM/DD) 簽署日期 (年 / 月 / 日)
Signature of Proposed Owner/Owner (If other than Proposed Insured/Insured) 建議持有人 / 持有人簽署 (如非建議被保人 / 被保人)	Date Signed (YYYY/MM/DD) 簽署日期 (年 / 月 / 日)
Signature of Payor (If other than Proposed Owner/Owner) 付款人簽署 (如非建議持有人 / 持有人)	Date Signed (YYYY/MM/DD) 簽署日期 (年 / 月 / 日)
Signature of Financial Consultant/Witness 理財顧問 / 見證人簽署	Date Signed (YYYY/MM/DD) 簽署日期 (年 / 月 / 日)