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在索取、列印或填寫表格前，請閣下先詳閱下文。

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轉保聲明
Replacement Declaration

CTF Life
周大福人壽

申請人姓名
Name of the Applicant : _____

申請號碼
Application No. : _____

閣下是否使用或打算使用現有人壽保險保單的部分或全部資金，或使用或打算使用通過減少現有人壽保險保單的應付保費而節省的金額，以資助閣下購買新的人壽保險保單？例如，此等資金或金額可能來自：

In order to fund the purchase of your new life insurance policy, are you using, or do you intend to use some or all of the funds arising from your existing life insurance policy, or any savings made by reducing the premium payable under your existing life insurance policy? For example, such funds or savings may arise from:

- a) 就閣下現有人壽保險保單作出退保/部分退保的安排，以獲得其退保價值
surrendering / partially surrendering your existing life insurance policy to obtain its surrender value
- b) 從閣下現有人壽保險保單中提取保單貸款 (包括自動保費貸款) 或抵押現有人壽保險保單以獲取貸款
taking out a policy loan (including automatic premium loan) from your existing life insurance policy or use existing life insurance policy as a collateral to obtain loan facility
- c) 從閣下現有人壽保險保單中提取保單價值 (例如：套現紅利或贖回基金單位等)
withdrawing policy values from your existing life insurance policy (e.g. cash out dividends or redeem fund units etc.)
- d) 容許閣下現有人壽保險保單失效 (例如：終止支付保費)
lapsation of your existing life insurance policy (e.g. by non-payment of premium)
- e) 行使閣下現有人壽保險保單中「保費假期」的權利
exercising the right to a premium holiday under your existing life insurance policy

☐ 是
Yes

☐ 尚未決定
Not yet decided

☐ 否
No

請在適當的方格內填上剔號 (只可選擇一項)
Please check one appropriate box only

忠告：請小心回答上述問題。就現有人壽保險保單作出變更未必符合閣下的最佳利益。閣下的持牌保險中介人必須向閣下解釋有關變更對閣下的財務、受保資格及索償資格所構成的影響。因此，閣下的持牌保險中介人可能會向閣下索取閣下現有人壽保險保單的某些資料。閣下可能需要聯絡現有人壽保險保單的保險公司並向其索取有關現有人壽保險保單準確及最新的資料。

Warning: Please answer the above question carefully. Making changes on your existing life insurance policy may not be in your best interest. Your licensed insurance intermediary must explain to you the financial implications, insurability implications and claims eligibility implications of such changes. For this purpose, your licensed insurance intermediary may require certain information on your existing life insurance policy. You may need to approach the insurer of your existing life insurance policy to obtain accurate and up to date information on your existing policy.

若閣下的回答為「是」或「尚未決定」，閣下的持牌保險中介人必須向閣下解釋《重要資料聲明書—轉保》。

If your answer is "Yes" or "Not yet decided", your licensed insurance intermediary must explain the "Important Facts Statement – Policy Replacement" to you.

申請人簽署
Signature of the Applicant _____

日期 (日/ 月/ 年)
Date (DD / MM / YYYY) _____

持牌保險中介人簽署
Signature of Licensed Insurance
Intermediary _____

日期 (日/ 月/ 年)
Date (DD / MM / YYYY) _____

持牌保險中介人姓名
Full name of Licensed Insurance
Intermediary _____

牌照類別及牌照號碼
Intermediary Type of
License and License No. _____

