Withdrawal – Investment-Linked Insurance 提取保單款項-投資相連壽險



Policy No. 保單編號	
Name of Policy Owner 保單主權人姓名	



My Sun Life HK Mobile App 流動應用程式

Manage your policy at your fingertips 24/7 保單管理 隨時一觸實現











To ensure you can enjoy our high quality of service, we would like to invite you to update your contact details on My Sun Life HK or by completing the below section.

為確保您能享受完善的服務體驗,我們誠邀您透過My Sun Life HK應用程式或填寫以下部份更新您的聯絡資料

Email Mobile (電郵地址 手提

Important Notes 重要事項

- 1. Please complete this form by typing or in clear handwriting. Any amendments should be endorsed by the Policy Owner in full signature.
 - 請清楚地填寫此表格。任何資料如有更改、保單主權人必須在更改的位置簽署作實。
- 2. Subject to the provisions stated in the policy, the completed and signed forms must be received by Policy Administration Services of Sun Life Hong Kong Limited ("Sun Life") by 4:00 p.m. on a business day (except Saturdays, Sundays and public holidays) in order for the fund redemption to take place on the following valuation day. 在符合保單合約內之條款的規定下,已填妥及簽署的表格須於每個營業日(星期六、星期日及公眾假期除外)下午四時正前交到香港永明金融有限公司(「永明」)保單行政服務部,以便於下一個估值日進行有關基金贖回交易。
- 3. Sun Life shall not be liable for any loss or damages, whatsoever or howsoever arising from delay in processing your instruction in any of the circumstances including but not limited to the below:
 - a. Any incomplete or unclear instruction resulting that we cannot process your instruction in full, we will not process any portion of the instruction.
 - b. If more than one instruction is received in respect of the same/ different transactions for the same policy on any single day, Sun Life has the sole discretion to determine the priority in dealing with such instructions or to defer such instructions.
 - c. If any contribution(s) is pending for investment or processing or any transaction for the same policy is in progress at the date of receipt of this form, Sun Life has the sole discretion to determine the priority in dealing with such instructions or to defer such instructions
 - 永明毋須對因延遲處理閣下的指示而招致的任何損失或損項承擔責任,包括但不限於以下情況:
 - 甲. 任何不完整或不明確的指示導致不能完整處理閣下的指示, 永明不會處理此表格的任何部份。
 - 乙. 永明於任何一日收到閣下就此保單的相同或不同交易發出超過一項指示,永明可全權酌情決定該等指示的處理先後次序或延遲處理閣下指示。
 - 丙. 永明於收到此表格時就此保單仍有未完成或進行中的供款或任何進行中的交易,永明可全權酌情決定該等指示的處理先後次序或延遲處理閣下指示。
- 4. Some investment-linked insurance policies may subject to an Early Withdrawal Charge/Early Encashment Charge or other charge(s) and will be deducted from the withdrawn amount, if applicable. 部份投資相連保險產品可能收取提前贖回費用或其他費用並將從提取金額扣除(如適用)
- 5. If your policy is subject to an Early Withdrawal Charge/Early Encashment Charge or other charge(s), the date of receipt of this form by Sun Life will be used to calculate the Policy Year or Contribution Year of this instruction, if applicable. 如閣下的保單需要繳付提前贖回費用或其他費用,永明將根據收到此表格的日期,用以計劃有關的保單年期或供款年期(如適用)
- 6. For some investment-linked insurance policies, if the Death Benefit Option then in effect under your policy is Level Face, we may automatically reduce the Face Amount of all Life Coverages then in effect under your policy by their proportionate share of the Cash Withdrawal. The minimum face amount after withdrawal is subject to the minimum face amount requirements specified by Sun Life. Otherwise, your policy shall be terminated. Please refer to your policy provisions for further details.

部份投資相連保險產品的身故賠償選擇若為固定保額,當提取款項後,受保人的人壽保障總額可能會相應調低。提取款項後 的最低保障額須按永明規定,否則,閣下的保單將會終止。詳情請參閱保單條款。

7. If you intend to withdraw policy value in this policy in order to use it as premium payment of a new insurance policy, please approach to your licensed insurance intermediary who will assist you to understand the implications and associated risks involved as explained in "Important Facts Statement – Policy Replacement" ("IFS-PR"). You shall read through the details before making the change and return the signed IFS-PR together with the new application (if any) to us. 如閣下打算在本保單中提取保單價值以繳付新保單之保費,請聯絡閣下的持牌保險中介人,以助閣下了解「重要資料聲明書 —轉保」("IFS-PR")內所述的影響和相關風險。在進行保單更改前,請閣下閱讀詳細內容,並簽署IFS-PR與新申請表(如有)一併遞交。

2024.07

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Important Notes (Continue) 重要事項 (續)

所有銀行手續費將由保單主人承擔並在付款中扣除。

- 8. Once the form is submitted to Sun Life, whether through Sun Life's licensed insurance intermediary or otherwise, you cannot withdraw or change any of the instructions provided on the form. Any change of instructions will be treated as a new request, which will be processed after the former request is effected by Sun Life.

 此表格一經遞交給永明,不論是經由永明持牌保險中介人、或由其他途徑遞交,閣下便不能取消或更改表格上的任何指示。任何更改,將被視作一項新申請,而該新申請會在永明將閣下先前的申請辦妥後處理。
- 9. Sun Life reserves the right to ask for other supporting documents if deemed necessary. 如有需要,永明保留要求遞交其他証明文件之權利。
- 10. When the payment amount is HKD2,000,000.00 (or its equivalent) or more, identity verification for non-corporate entity owner may required to safeguard your interest. SMS will be sent to the registered mobile phone number of policy owner to proceed with the verification. If the identity verification cannot be completed within the required timeframe, Sun Life may not able to process your request.

如付款金額為港幣2,000,000.00元(或其等值)或以上,我們將可能會核實非法團實體保單主權人身份以保障您的利益。保單主權人的登記手提電話號碼將會收到短訊以進行認證。倘若身份認證未能在指定時間完成,永明金融或未能處理您的申請。

11. If you require other payout method, please state under 'Other Instruction' in this form. If overseas telegraphic transfer is used, please submit 'Telegraphic Transfer Instruction' form for relevant information. All bank charges will be borne by the policy owner and to be deducted from the payment amount. 倘若您需要其他收款方式,請於本表格「其他指示」內列明。如以海外電匯方式領款,請遞交「電匯指示」提供相關資料。

For Maximum Withdrawal on Rainbow Retirement and Rainbow Graduate Policy 有關彩虹退休計劃及彩虹高材生計劃保單提 取最高可贖回金額:

- 12. The maximum withdrawal applies to all Available Unit in this policy (Including Initial Investment Account and/or Accumulation Investment Account).
 - 此項提取適用於所有保單中之可贖回金額(包括初始投資戶口及/或累積投資戶口)。
- 13. The maximum withdrawal amount will be rounded down to the nearest ten. 最高可贖回金額將會約算至數十位。
- 14. The remaining fund value after withdrawal will be kept in each fund on pro-rata basis according to the investment account value in this policy on the processing date. 提取後之結餘將按處理此申請當天保單內的基金價值按比例計算分配於各基金。
- 15. This request is subject to the minimum available investment account value requirement after withdrawal specified by Sun Life. Sun Life reserves the right to reject/accept an instruction that do not meet such requirement(s). 此申請受永明規定之最低可用投資價值規定約束,永明保留權利拒絕/接受不符合該等要求之指示。
- 16. The maximum amount available for withdrawal is subject to fund price fluctuations and Sun Life reserves the right to determine it at its absolute discretion. 最高可贖回金額受基金價格浮動影響,永明有絶對權力決定該金額。

(1) Withdrawal Fund Value 提取投資相連基金

No	otes 備註:					
1.	Please fill in the percentage of the fund in whole number. 請以整數填寫基金百份率。					
2.	2. The payout amount may vary from the requested amount due to fluctuations of fund price. 由於基金價格浮動,最終付款金額或會與申請金額有所差異。。					
3.		of Rainbow Retirement or Rainbow Grad 計劃或彩虹高材生計劃.	uate plan,			
		faulted to withdraw from Accumulation I on and Initial Investment Account" under	nvestment Account if no option is selected in column "Withdrawal BOTH			
			· 」一欄,則一律預設從累積投資賬戶內提取。			
			awn from Accumulation Investment Account and the remaining amount will be			
			s insufficient fund in Accumulation Investment Account. 資賬戶的金額不足. 餘額則從初始投資賬戶中提取。			
^		vailable at Sun Life's website (www.sunlif				
	基金編號可於永明的	内網頁(www.sunlife.com.hk)內查詢。				
(A)	Applicable to R	ainbow Retirement or Rainbow Gradu	uate ONLY 只適用於彩虹退休計劃或彩虹高材生計劃			
		wal maximum amount 提取最高金額				
	Withdra	Wai maximum amount 定以取同亚 银				
(B)	Please indicate y	our fund choice and instruction in the	is table. 請在下表填寫您的基金選擇及指示。			
	Withdrawal BOTH Accumulation and Initial Investment Account					
	Fund code	Percent (%) / Specified Amount	(Only applicable to Rainbow Retirement or Rainbow Graduate)			
	基金編號^	百分率 (%) / 指定金額	同時提取累積及初始投資賬戶 (只適用於彩虹退休計劃或彩虹高材生計劃)			
			(只週用於杉型巡外計劃以杉型高的生計劃)			
•						

(2) Payout Method 收款方式

,												
(A)	Tran 轉至	sfer to Policy 保單										
		。 <mark>備註:</mark> 	- 4 4 1: 41 -		1		1	1 "T1- :	d Danta I	D	4 D1	
	如	ipayment is to be transferr I <mark>欲轉移款項至非閣下名下的</mark> Iease choose the Amount t	保單,請填寫「第	第三者付款聲明		ease co	mpiete t	ne Inire	a Party I	Paymen	it Declara	ation Form .
	請	强擇轉至保單的金額 。				1 41	11	1		1		1 641
	ba 如	payment is to be transferre alance (if any) in option (D) 1欲轉移款項至多於一份保單 E處理該申請。	. If instruction is	s not clear, the	request ca	n only b	oe proce	ssed upo	n receip	ot of cor	nplete in	structions.
	Policy	y No. 保單號碼:		fo	or 作為							
		☐ Premium & Levy 保費	長 及保費徵費			Loan	repaym	ent 償還	置貸款			
	Amou	unt 金額										
	[☐ In Full 全數				Partia	al 部份^	: Pleas	e speci	fy 請註	眀	
		ease select payout method 於以下(B)或(C)部份選擇餘額		oy completing (option (B)	or (C) in	n this par	rt below.				
(B)		er Payment Service (' 快或本地銀行轉賬	"FPS") or Loc	al Bank Tra	nsfer							
		TCE TIPS: FPS or local ban 小貼士:轉數快或本地銀行轉					e to que	ue up in	the ban	k.		
-		備註:	ALACO (DCR375)AA	1976. A Ar-JAX 15.	01 10 THU DCA 3							
		ank account holder name r <mark>限行賬戶持有人姓名必須與保</mark>					e of the a	assignee	(which	ever is a	ppropria	te).
		applicable to the payment only reasons, the payment w										
	fu	irther notice. (Applicable t	to the policy with	local correspo	ndence ad	ldress o	nly.)			·		
	適用於付款貨幣為港元或人民幣之本地銀行賬戶。倘若款項超過轉數快的上限或因任何原因交易失敗,有關款項將按已選擇的收取 款項貨幣以支票形式及郵寄發出而不作另行通知。(只適用於有本地通訊地址之保單) (3) The actual time to receive the payment by FPS or local bank transfer may vary among banks. Please enquire relevant bank											
	be	efore application. 動快或本地銀行轉賬的實際				Ť			Flease	enquire	reievani	Dalik
	#11	f数 人	判拟时间音凶 滤服	9万19以7111111节左	氏, 中阴 则	門ノレドリコ	月 例 蚁 】 】	르메。				
		'FPS' identifier 轉數快	:識別號碼:									
		Mobile number 手機號	碼 (by FPS 轉數	快): (Country () -	Telepho	one No.					
				國家代號		電話號码						
		Email 電郵 (by FPS 轉	數快):									
				. taus 7	- 151	. ^0 /= 0=	===					
	Ш	Transfer to the followir * Please provide bank	_					ınt hold	ler nam	ne and a	account	number.
		If no true copy is prov holder or failed bank t	rided / insufficio	ent information	on to prov	e the p	olicy ov	wner/a	ssignee	is the	sole ban	k account
		without further notice	e. (Applicable t	to the policy w	rith local o	corresp	ondend	ce addre	ess only	7)		
		請提供載有單一銀行 類 料不全以證明唯一銀行	長戶持有人姓名 _{亍賬戶持有人為}	及銀行賬號的 保單主權人 / :	銀行賬戶 受讓人或[證明文 因任何/	件真確 原因未能	副本 。如 能成功轉	口未提供 專賬,有	キ證明文 ˙關款項	【件真確 [將以支系	副本/資 票形式及
		郵寄發出而不作另行過	通知。 (只適用於	令有本地通訊地	地之保單	<u>i</u>)						
		Bank No 銀行編號	Branch No 分行編號		Account l 賬戶號碼	Number	r					
					<u> </u>				_			
		Transfer to the active a	utonay hank ac	count registe			1:	and han				
	Ц	policy owner (payout c	urrency is appli	icable to HKD	Only).		_					t be the
	Ц	policy owner (payout c 轉賬至上述保單內登記	urrency is appli 及持有保單主權	icable to HKD 聖人為銀行賬戶	Only).		_					t be the
	Ц	policy owner (payout c	urrency is appli	icable to HKD	Only). 与持有人的		_					t be the

(2) Payout Method (Continue) 收款方式 (續)

/ I ay	out M	etilod (Colitilide) 以永力氏 (槇)				
(C)	Chequ 支票	e				
	SERVICE TIPS: Cheque takes some time for clearance. Please consider FPS or local bank transfer be a better choice to you. 服務小貼士:支票兌現需時,請考慮轉數快或本地銀行轉賬為更佳選擇。					
		註: USD policy, a local USD cheque will be issu 特別指示,美元保單將獲發本地結算之美元支				
	Chequ	e Currency 支票貨幣				
		HKD 港元	□ Policy Currency 保單貨幣			
	Chequ	e to be 支票將				
		Posted to my correspondence address	郵寄至本人通訊地址			
		Delivered via my licensed insurance in	termediary 由本人之持牌保險中介人輔	專交		
		Collected at Client Service Centre 親臨	客戶服務中心領取			
		By the policy owner 保單主權人領取				
		Contact Phone No. (if difference from the re	cord under this policy)			
		聯絡電話號碼 (如與本保單記錄不同)				
		By the authorized person 授權人領取				
		Name of Authorized Person 授權人姓名	I.D. No. of Authorized Person 授權人身份證明文件號碼	Contact Phone No. of Authorized Person 授權人聯絡電話號碼		
(D)	Other] 其他收	Payment Instruction				
	共心权	秋角小				

Personal Data Collection and Use 個人資料收集及使用

I/We understand and consent that, any personal data collected by Sun Life Hong Kong Limited (Incorporated in Bermuda with limited liability) ("Sun Life") (whether collected in this form or otherwise) may be used by Sun Life for the following purposes: (i) processing and evaluating insurance applications and/or any other applications for financial services; (ii) administering and providing services in relation to insurance or financial products; (iii) processing, investigating and settling insurance claims and detecting and preventing fraud (whether or not relating to the policy issued by the Company); (iv) conducting customer surveys; (v) researching and designing financial, insurance or pensions products for clients' use; (vi) selecting and participating in reward, loyalty or privileges program and related service; (vii) contacting clients for the above purposes; (viii) purposes which are directly related to the above purposes; and (ix) complying with applicable laws, regulation or court order or obligation or requirement under an agreement, or other commitment, between Sun Life or any entity within the Sun Life Group and the regulator or government in any jurisdiction (in relation to money laundering, terrorist financing and tax evasion or otherwise) to which Sun Life and its related companies are subject to.

Sun Life may also use my/our contact details, demographic information and policy details to contact me/us with marketing information regarding Sun Life and third party pensions, financial and insurance products, including by phone calls, mail, email, SMS or any type of electronic message. Sun Life may not use my/our data for direct marketing unless Sun Life have received my/our consent (which includes an indication of no objection). I/We know I/we can tick the box below if I/we do not consent to receive direct marketing information.

Sun Life may disclose my/our personal data for any of the above purposes: (a) to third parties who provide services in Hong Kong or elsewhere which assist the Company to carry out the above purposes, including claims investigators, insurance adjusters, medical advisors, health care professionals, medical service providers, hospitals, emergency assistance service providers, reinsurers, accountants, solicitors and professional financial advisors; (b) to banks for payment purposes; (c) to insurance brokers who are representing the policy owners or clients directly or indirectly; (d) to the Company's insurance agents and MPF intermediaries; (e) to the Company's related companies (as defined in the Companies Ordinance) including pensions services provider, financial services companies and insurance companies; (f) to the Hong Kong Federation of Insurers (or any similar association of insurance companies) and its members; (g) to the policy owner / employers of an insured employee under a group product; (h) to any third party service provider appointed by the policy owner who provides administrative services for the policy owner; (i) to organisations that consolidate claims and underwriting information for the insurance industry; (j) to fraud prevention organisations; (k) to other insurance companies (whether directly or through fraud prevention organisations or other persons named in this paragraph), the police and databases or registers (and their operators) used by the insurance industry to analyse and check information provided against existing information; (I) to any person to whom the Company or its related companies (inside or outside Hong Kong) are under an obligation to make disclosure under the requirements of any law, regulation or court order binding on or applying to or to which the Company or its related companies (inside or outside Hong Kong) are subject to, or under and for the purposes of any guidelines issued by regulatory or other authorities with which the Company or its related companies (inside or outside Hong Kong) are expected to comply; and (m) as otherwise required or permitted by law.

If third party personal information is supplied to the Company by the clients, clients' service providers, claimants or applicants for services, such clients, service providers, claimants or applicants must inform these third parties about this personal information collection statement before they collect their information and supply it to the Company. I/We understand that it is voluntary for me/us to supply the information, but failure to provide the requested personal data may mean Sun Life is unable to process my/our application or continue to provide services to me/us. I/We have the right to seek access to and request correction of any personal data Sun Life holds about me/us by sending a written request to The Manager, Client Service Centre, Sun Life Hong Kong Limited, G/F, Tower B, Cheung Kei Center, 18 Hung Luen Road, Hunghom, Kowloon, Hong Kong. Sun Life may charge a reasonable fee for the processing of any such requests. "Sun Life Group" means Sun Life together with its subsidiaries, subsidiary undertakings and associated companies (whether direct or indirect) from time to time.

П	Please tick here	to reject receiving	a marketing info	rmation from S	un I ifo
_	riease lick liele	to reject receiving	e marketine mio.	mation nom s	un Liie.

本人/吾等明白及同意香港永明金融有限公司(於百慕達註冊成立之有限責任公司)(「永明」)可以將其所收集的任何個人資料(不論由此表格所收集或由其他途徑取得)作以下用途:(i)處理及評估申請及/或任何其他金融服務申請;(ii)管理並提供與保險及/或金融產品相關服務;(iii)處理、調查和結清保險索償個案、以及偵測和防止欺詐行為(無論是否與公司發出的保單有關);(iv)進行客戶調查;(v)為客戶研究及設計金融、保險或退休金產品;(vi)甄選及參與獎賞、忠實或特選客戶計劃;(vii)因上述目的與客戶聯絡;(viii)與上述目的直接有關的任何其他目的;及(ix)為遵守適用的法例、法規、法庭命令或永明或永明集團內的任何實體與任何管轄區域的監管機構或政府之間的協議項下的義務或要求或其他承諾(其相關於洗黑錢、恐怖分子資金籌集、逃稅或其他)。

假如第三方個人資料是由客戶、客戶的服務供應商、索償人或申請人提供給公司,該客戶、服務供應商、索償人或申請人必須在收集這些資料前,將此《個人資料收集聲明》告知有關的第三方才把資料提供給公司。

本人/吾等明白本人/吾等提供個人資料均屬自願,然而倘若未能提供所需個人資料,可導致永明無法處理本人/吾等的申請或繼續提供服務予本人/吾等。本人/吾等有權查閱及要求更正永明持有有關本人/吾等的個人資料,有關要求可以書面形式郵寄至香港九龍紅磡紅鸞道18號祥祺中心B座地下香港永明金融有限公司客戶服務中心經理。永明可就處理任何該等要求收取合理費用。

"永明集團"指永明及其不時之附屬公司、附屬企業和相聯公司(無論是直接的還是間接的)。

Е	】 若不同意收取由永明發	出的推廣資訊.	請於方格內填l	- 剔號
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Declaration & Authorization 聲明及授權

I/We confirm that, by signing below, I/We have read, fully understood and agreed to the notes throughout the form. 本人/我們已細閱,完全明白及同意本表格的注意事項並簽署作實。

I/We understand and agree Sun Life to collect my/our personal information via electronic means for identity verification upon

本人/我們明白及同意永明金融透過電子方式收集本人/我們的個人資料作身份驗證。

I/We understand that this policy service instruction is bound by the policy provisions of the above policy.

本人/我們明白上列的保單服務指示須受上述保單的條款約束。

I/We understand and agree that should I select payout amount in a different currency other than the Policy Currency, I will bear the necessary exchange difference, such difference being determined by Sun Life on the basis of the internal exchange rates as at the time of the relevant currency conversion.

本人/我們明白並同意,如果我選擇保單貨幣以外的其他貨幣付款金額,我將承擔必要的匯兌差額,該差額由永明根據當時的內 部匯率確定相關貨幣換算。

I/We understand that investment involves risk and the value of investment may go down as well as up. Past performance is not necessarily a guide to future performance. 本人/我們明白投資附帶風險及投資價格可升可跌。過往業績不能作日後表現的指引。

Req	Required Item and Signature 所需項目及簽署				
	To proceed your request, please submit the below item. 保單主權人需要遞交以下項目以處理閣下的申請。				
	True copy of the Policy Owner's valid identity proof (if it has expired or not provided before). 保單主權人有效之身份證明文件真確副本(若已過有效期或之前未曾提交)。				
	True copy of bank account proof to show the information of bank account number and name of bank account holder. 載有銀行賬戶號碼及賬戶持有人姓名資料的銀行賬戶證明文件真確副本。				

<< PLEASE DO NOT SIGN A BLANK FORM 請勿在空白表格上簽署>>

X Signature of Policy Owner	Sign Date (DD/MM/YYYY)
【 保單主權人簽署 [*]	簽署日期(日/月/年)
X Signature of Irrevocable Beneficiary (if any) 不可撤換受益人簽署 (如有)	Sign Date (DD/MM/YYYY) 簽署日期 (日/月/年)
X Signature of Assignee (if any) *Please refer to Note 1 below 受讓人簽名 (如有) *請參見下列附註一	Sign Date (DD/MM/YYYY) 簽署日期 (日/月/年)

* Note 1: By signing in this box, the receipt of fund value at the account specified above or by such other means specified above shall be a full discharge and release of Sun Life of its liability to pay the amount to the Assignee under the collateral assignment

arrangement relating to the Policy, whether the amount is paid by Sun Life to the Assignee or the Assignor (Policy Owner). 透過在此方格簽署,上述賬戶收到投資相連基金已透過上述其他方法被收取即等如受讓人解除及撤銷永明金融在上述保單相關的抵押轉讓安排下需向受讓人繳付該金額的責任,不論永明金融將該金額向受讓人或轉讓人(保單主權人)繳付亦一樣。 * 附註一:

Please return a full set of this form within 30 days of signing 請於簽署後30天內提交完整的表格