

Date 日期: _____

1. Type of payment 付款方式

- ☐ Cash現金
(For Cashier counter use only 繳費櫃位專用)
 ☐ Direct bank-in cash 銀行現金存款
(Original bank deposit slip attached 附上銀行入數紙正本)
 ☐ Bank transfer 銀行戶口轉帳
(Original bank deposit slip attached 附上銀行入數紙正本)
- ☐ Credit card 信用卡 Credit card No.信用卡號碼 _____ - XXXX - XXXX - _____
 ☐ Telegraphic transfer 電匯
(Payment records attached 附上付款記錄)
- ☐ Cheque 支票
 ☐ Cashier order/Bank draft 銀行本票 no. 號碼 _____
(Purchase advice attached 附上付款記錄)
- ☐ Online bank transfer 網上銀行轉帳
 ☐ Others (Please specify) 其他 (請註明) _____
(Payment records attached 附上付款記錄)

2. Premium details 保費內容

If the premium is not paid by policyowner or insured or beneficiary, please complete "Part 3. Payor information".
若不是由保單持有人或被保人或受益人付款。請填寫“第三部分 – 付款人資料”

Name of Financial Consultant & code 理財顧問姓名及編號 ()				Contact no. of Financial Consultant 理財顧問聯絡電話: _____										
	Name of insured 被保人姓名	Policy no. 保單編號	Amount 金額 (HKD/ USD/ others 港元/ 美元/ 其他)	(Please tick the appropriate box 請在適當空格內加上「✓」號)										
				Type of premium 保費類別					Payor 付款人					
				NB 新生意	DFC 更改保單	Renewal 續期保費	Repay loan 償還貸款	FPD 預繳保費	Policyowner 保單持有人	Insured 被保人	Beneficiary 受益人	Others 其他		
1														
2														
3														
4														
		Total amount: 繳費總額:		Supplement: 補充: _____										

3. Payor information 付款人資料

1. Please complete 3a if the payment is HKD120,000 or below (or equivalent in other currency). 付款港幣120,000元或以下(或其他貨幣之等值), 請填寫3a。
2. Please complete 3a and 3b if the payment is above HKD120,000 (or equivalent in other currency). 付款港幣120,000元以上(或其他貨幣之等值), 請填寫3a及3b。

3a	We only accept payment made by policyowner/insured's direct family members as follow. Third party payments will not be accepted. 我們只接受下列保單持有人或被保人直系親屬, 而本公司 不接受第三者繳款 。 (Please tick the appropriate box. 請在適當空格內加上「✓」號)		
	☐ Spouse 配偶 ☐ Parents 父母 ☐ Grandparents 祖父母 ☐ Grandchildren 孫子女 ☐ Siblings 兄弟姊妹 ☐ Children 子女 ☐ Father-in-law and mother-in-law 配偶之父母 ☐ Corporate payment 公司付款		
	Reason(s) for payment on policyowner's behalf 代保單持有人付款原因	English or Chinese name of Payor 付款人中文或英文姓名	
3b	☐ Identity card 身份證 ☐ Passport 護照 ☐ Travel document 旅遊證件 (Please tick the appropriate box 請在適當空格內加上「✓」號)	Identification document No. 證件號碼	Nationality 國籍
	Date of Birth 出生日期 (DD/MM/YYYY)	Gender 性別	Occupation and title 職業及職位
Source of Wealth (may select one or more) 財富來源 (可選擇一項或以上) ☐ Salary income/Bonus 薪金 / 獎金 ☐ Rental income 租金收入 ☐ Accumulated saving 累積儲蓄 ☐ Loan 貸款 ☐ Business earning 商業收入 ☐ Investment return/ongoing investment income 投資回報 / 持續投資收入 ☐ Pension fund/Ongoing pension income And Previous occupation 公積金 / 持續公積金收入及過往職業 ☐ If financially depends on others, please provide relationship, occupation and title 如果經濟上依賴他人, 請提供關係、職業及職位 _____ ☐ Others (Please specify) 其他 (請註明) _____			

Important Note

To prevent delays in the application or policy lapsation, please ensure that all information on the payment slip is accurate.

For a seamless payment process, kindly keep in mind the following points:

1. For payment made by a corporation owned by policy owner/life insured, please complete the "Policy Owner Declaration Form - Corporate Payment" and submit the supporting document showing that the policy owner/life insured owns 50% or above of share capital or voting rights of the corporation.
2. All requirements in Anti-money laundering guideline and MCV payment guideline should be strictly followed. Please refer to relevant guideline(s) for details.
3. Premium payment from the financial consultant will not be accepted except for the policies of their own and their direct family members.
4. Direct family members only include spouse, brothers, sisters, parents, children, grandparents, grandchildren, father-in law or mother-in law.
5. For Direct bank-in payments, the original bank in slip must be submitted for processing.
6. For any policy service applications that result in a change of premium amount (eg. to decline indexation endorsement or change payment mode), the attached payment would be put into "Deposit for Change" account for processing.

重要事項

為了避免申請延遲或保單失效，敬請確保繳費單上的所有資料 正確無誤。

為確保繳交保費之過程順利，敬請留意以下各點：

1. 如付款人為保單持有人/被保人所屬的公司（必須持有50%或以上股權或控制權），請填妥「保單持有人聲明書 - 公司付款」及提交有關證明文件顯示保單持有人/被保人持有50%或以上公司的股權或控制權。
2. 所有防止洗黑錢條例的指引及內地訪港旅客的付款指引，都必須嚴厲執行。詳情請參考有關付款指引
3. 由理財顧問所代支付的款項都不獲接納，其本人及其直系親屬之保單則除外
4. 直系親屬只限配偶、兄弟、姊妹、父母、子女、祖父母、孫子女、配偶的父母
5. 如以直接銀行轉賬形式繳款，必須提供客戶存款單的正本，以便辦理
6. 任何保單服務導致保費金額有所變更之申請，（如不接受保額增值，更改繳費形式等），有關之款項將會存入「更改保單」內，以便辦理

For Cashier Use Only
繳費處專用