

Special Arrangement of Premium Payment Application Form

保費繳付特別安排申請書



Being the Policyowner of the following policy(ies), I understand that policy premiums should be paid by myself or the life insured (if different from me). However, I would like to propose the following designated third-party (the "Payor") to pay for my policy(ies) on my behalf. Below are the details:
作為以下保單之權益人，本人明白保費應由本人或被保人（如非本人）繳交。唯本人現申請由下述之第三者（簡稱“繳款人”）代本人繳付本人之保單，詳情如下：

Policy No(s) 保單編號 : _____
Payor 繳款人 : _____
Reason 原因 : _____

I confirm the following relationship between the Payor and me (Policyowner):
本人（保單權益人）確認與繳款人之關係如下：

- Spouse 配偶
- Parent / Child / Grandparent / Grandchild* 父母 / 子女 / 祖父母 / 孫子女*
- Parent-in-law / Son-in-law / Daughter-in-law* 配偶之父或母 / 女婿 / 媳婦*
- Employer-Employee 僱主-僱員
- Sole Proprietor / Partner of the Partnership / Director of the Limited Company *¹
獨資業務東主 / 合夥公司之合夥人 / 有限公司之董事*

*Please delete where inappropriate 請刪除不適用者

¹For Payor that is a body corporate or unincorporated, please contact your adviser or customer service centre about the documents required.
如繳款人屬法人團體或非法人團體，請向閣下之理財顧問或客戶服務部查詢所需文件。

I understand that the above application is subject to FWD's approval. FWD reserves the rights to (i) request the relevant supporting documents (such as address proof, relationship proof, etc.), and/or (ii) decline any application or withdraw approval at any subsequent time without giving reason.
本人明白上述申請需交由富衛審批。富衛保留以下權利：(i) 索取相關證明文件(如:地址證明、關係證明等)及 / 或(ii) 拒絕任何申請或於其後任何時間取消批准而毋須給予理由。

Signature 簽署:

Policyowner 保單權益人

Witness (Full Name) 見證人(全名)

Date 日期: _____

Declaration by the Payor (繳款人聲明)

I declare and confirm that I agree to pay the premium(s) on behalf of the Policyowner and under no circumstances can I claim for refund of such payment. I further confirm that the funds for paying the premium(s) belong to me and are not related to any unlawful activities.
本人聲明及確認本人同意代保單權益人繳付有關保費；及在任何情況下，本人無權要求退回該款項。本人進一步確認繳付保費的資金屬本人所有，有關資金並不涉及任何非法活動。

I understand and confirm that FWD shall have the right to request additional information or supporting documents[#] for the sole purpose of ascertaining my identity and if so required, to disclose such information to any law enforcement agencies.
本人明白及同意富衛有權就此申請要求額外資料或證明文件[#]以用作確認本人身份及在有需要的情况下向任何執法機關披露有關資料。

Signature 簽署:

Payor 繳款人

Witness (Full Name) 見證人(全名)

Date 日期: _____

[#]Note: It is not compulsory for Payor to provide supporting documents.
注意: 繳款人可選擇不提交證明文件。

For Office Use Only 公司專用

Handled by 處理人	Approve by 批核人	Date 日期
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Personal Information Collection Statement ("PICS")

1. From time to time, it is necessary for you to supply **FWD Life Insurance Company (Bermuda) Limited** (the "Company") or agents and representatives acting on its behalf with personal information and particulars in connection with our services and products. Failure to provide the necessary information and particulars may result in the Company being unable to provide or continue to provide these services and products to you.
2. The Company may also generate and compile additional personal data using the information and particulars provided by you. All personal data collected, generated and compiled by the Company about you from time to time is collectively referred to in this PICS as "Your Personal Data".
3. "Your Personal Data" will also include personal data relating to your dependents, beneficiaries, authorised representatives and other individuals in relation to which you have provided information. If you provide personal data on behalf of any person you confirm that you are either their parent or guardian or you have obtained that person's consent to provide that personal data for use by the Company for the purposes set out in this PICS.
4. As detailed in this PICS, Your Personal Data may also be processed by the Company's subsidiaries, holding companies, associated or affiliated companies and companies controlled by or under common control with the Company (collectively, "the Group").
5. The purposes for which Your Personal Data may be used are as follows:
 - (i) providing our services and products to you, including administering, maintaining, managing and operating such services and products;
 - (ii) processing, assessing and determining any applications or requests made by you in connection with our services or products and maintaining your account with the Company;
 - (iii) developing insurance and other financial services and products;
 - (iv) developing and maintaining credit and risk related models;
 - (v) processing payment instructions;
 - (vi) determining any indebtedness owing to or from you, and collecting and recovering any amount owing from you or any person who has provided any security or other undertakings for your liabilities;
 - (vii) exercising any rights that the Company may have in connection with our services and/or products;
 - (viii) carrying out and/or verifying any eligibility, credit, physical, medical, security, underwriting and/or identity checks in connection with our services and products;
 - (ix) any purposes in connection with any claims made by or against or otherwise involving you in respect of any of our services or products, including, making, defending, analysing, investigating, processing, assessing, determining, responding to, resolving or settling such claims;
 - (x) performing policy reviews and needs analysis (whether or not on a regular basis);
 - (xi) meeting disclosure obligations and other requirements imposed by or for the purposes of any laws, rules, regulations, codes of practice or guidelines (whether applicable in or outside Hong Kong) binding on the Company or any other member of the Group, including making disclosure to any legal, regulatory, governmental, tax, law enforcement or other authorities (including for compliance with sanctions laws, the prevention or detection of money laundering, terrorist financing or other unlawful activities) or to any self-regulatory or industry bodies such as federations or associations of insurers;
 - (xii) for statistical or actuarial research undertaken by the Company or any member of the Group; and
 - (xiii) fulfilling any other purposes directly related to (i) to (xii) above.
6. Your Personal Data will be kept confidential, but to facilitate the purposes set out in paragraph 5 above, the Company may transfer, disclose, grant access to or share Your Personal Data with the following:
 - (i) other members of the Group;
 - (ii) any person or company carrying on insurance-related and/or reinsurance-related business which is engaged by the Company in connection with the Company's business;
 - (iii) any physicians, hospitals, clinics, medical practitioners, laboratories, technicians, loss adjustors, risk intelligence providers, claims investigators, legal advisors and/or other professional advisors engaged in connection with the Company's business;
 - (iv) any agent, contractor or service provider providing administrative, distribution, credit reference, debt collection, telecommunications, computer, call centre, data processing, payment processing, printing, redemption or other services in connection with the Company's business; and/or
 - (v) any official, regulator, ministry, law enforcement agent or other person (whether within or outside Hong Kong) to whom the Company or another member of the Group is under an obligation or otherwise required or expected to make disclosures under the requirements of any law, rules, regulations, codes of practice or guidelines (whether applicable in or outside Hong Kong).

7. Your Personal Data may be transferred or disclosed to any assignee, transferee, participant or sub-participant of all or any substantial part of the Company's business.
8. The Company is only allowed to (i) use Your Personal Data in direct marketing; or (ii) provide Your Personal Data to another person or company for its use in direct marketing, if you provide your consent or do not object in writing.
9. In connection with direct marketing, the Company intends:
 - (i) to use your name, contact details, services and products portfolio information, financial background and demographic data held by the Company from time to time in direct marketing to market the following classes of services and products offered by the Company, other members of the Group and/or Our Business Partners (being providers of the product and services described below) from time to time:
 - a. insurance services and products;
 - b. wealth management services and products;
 - c. pensions, investments, brokering, financial advisory, credit and other financial services and products;
 - d. health-check and wellness services and products;
 - e. media, entertainment and telecommunications services;
 - f. reward, loyalty or privileges programmes and related services and products; and
 - g. donations and contributions for charitable and/or non-profit making purposes; and
 - (ii) to provide your name and contact details to any members of the Group and/or Our Business Partners for their use in direct marketing the classes of services and products described in paragraph 9(i) above (including, in the case of Our Business Partners, for money or other commercial benefit).

If you do NOT wish the Company to use Your Personal Data in direct marketing or provide Your Personal Data to other members of the Group and/or Our Business Partners for their use in direct marketing (in paragraph 9 above) please tick below to exercise your right to opt-out.

Please do not send direct marketing information to me.

Please do not provide my personal data to other persons or companies for their use in direct marketing.

10. You may also write to the Company at the address below to opt out from direct marketing at any time.
11. To facilitate the purposes set out in paragraphs 5 and 9 above, the Company may transfer, disclose, grant access to or share Your Personal Data with the parties set out in paragraphs 6 and 9(ii) and you acknowledge that those parties may be based outside Hong Kong and that Your Personal Data may be transferred to places where there may not be in place data protection laws which are substantially similar to, or serve the same purposes as, the Personal Data (Privacy) Ordinance.
12. Under the Personal Data (Privacy) Ordinance you have the right to request access to Your Personal Data held by the Company and request correction of any of Your Personal Data which is incorrect and the Company has the right to charge you a reasonable fee for processing and complying with your data access request.
13. Requests for access to or correction of Your Personal Data should be made in writing to:

Corporate Data Protection Officer
FWD Life Insurance Company (Bermuda) Limited
1st Floor, FWD Financial Centre,
308 Des Voeux Road Central
Hong Kong

Should you have any queries, please do not hesitate to call our Customer Service Hotline on 3123 3123.
14. In case of discrepancies between the English and Chinese versions of this PICS, the English version shall apply and prevail.
15. The Company reserves the right, at any time effective upon notice to you, to add to, change, update or modify this PICS.

I have read, understand and accept this PICS. I consent to the transfer of my personal data outside Hong Kong and I understand my personal data may not be protected to the same or similar level in Hong Kong.

Signature: _____

Name: _____
(Name of applicant/individual to whom this PICS is given)

HKID/Passport number: _____

收集個人資料聲明

- 閣下需要不時向富衛人壽保險(百慕達)有限公司(「本公司」)或本公司的代理及代表就本公司的服務及產品提供個人資料及詳情。如未能提供所需資料及詳情,可能會導致本公司無法向閣下提供或繼續提供有關服務及產品。
 - 本公司亦可以利用閣下提供的資料及詳情製作及匯編額外的個人資料。本公司不時收集、製作及匯編的所有個人資料,以下統稱為「閣下的個人資料」。
 - 「閣下的個人資料」亦包括由閣下提供有關閣下的受養人、受益人、獲授權代表及其他人士的資料。如閣下代表他人提供個人資料,閣下確認閣下乃是他們的父母或監護人或閣下已取得有關人士之同意提供有關人士之個人資料予本公司作本聲明之用途。
 - 如本聲明所述,閣下的個人資料亦可能被本公司的附屬公司、控股公司、聯營或聯屬公司或本公司控制的公司或與本公司受共同控制的公司(統稱「本集團」)處理。
 - 閣下的個人資料可能用於以下用途:
 - 向閣下提供本公司的服務及產品包括管理、維持、處理及運作有關服務及產品;
 - 處理、評估及決定閣下就本公司的服務或產品而提出的任何申請或要求,以及維持閣下在本公司的賬戶;
 - 發展保險及其他金融服務及產品;
 - 發展及維持本公司信貸及風險之相關模型;
 - 處理付款指示;
 - 釐訂任何欠付閣下或閣下所欠的負債,及向閣下或任何為閣下的債務提供擔保或其他承諾的人士收取及追討欠款;
 - 行使與本公司的服務及/或產品有關的任何權利;
 - 就本公司之服務及產品作出資格、信貸、身體、醫療、擔保、承保及/或身份核証;
 - 用於任何因本公司的產品或服務而由閣下提出或本公司對閣下提出的申索,包括作出、抗辯、分析、調查、處理、評核、決定、回應、解決和和解有關申索;
 - 進行保單審閱及需求分析(不論是否定期進行);
 - 本公司或本集團的其他成員根據任何法律、規則、規例、實務守則或指引(不論在香港境內或境外適用)要求而須作出披露,包括向任何法定機構、監管機構、政府機構、稅務機構、執法機構或其他機構(包括為遵守制裁法、避免或偵查洗錢、恐怖分子資金籌集或其他不法活動)或向任何獨立監管或行業團體(如保險業聯會或協會等)作出披露;
 - 作本公司或本集團的任何成員的統計或精算研究;及
 - 履行與上文第(i)至(xii)段直接有關的其他用途。
 - 閣下的個人資料將被保密但為達成上文第5段列出的用途,本公司可能將閣下的個人資料轉移、披露、讓其查閱或與以下各方共同使用:
 - 本集團的其他成員;
 - 任何因本公司業務而聘用之經營保險相關及/或再保險相關業務之人士或公司;
 - 任何因本公司業務而聘用的治療師、醫院、診所、醫生、化驗所、技師、損失理算人、風險情報供應商、索賠調查人、法律顧問及/或其他專業顧問;
 - 任何向本公司之業務提供行政、分銷、信貸資料庫、債務追討、電訊、電腦、熱線中心、資料處理、付款處理、印刷、贖回或其他服務的代理人、承包商或服務供應商;及/或
 - 任何本公司或本集團的其他成員負有責任或需要或預期要根據任何法律、規則、規例、實務守則或指引(不論在香港境內或境外適用)作出披露的官員、規管者、部門、執法代理或其他人士(不論在香港境內或境外)。
 - 閣下的個人資料可能被轉移或披露予任何承讓人、受讓人、本公司業務的任何實質部分的參與人或次參與人。
 - 本公司只可在閣下作出書面同意或不反對的情況下(i)使用閣下的個人資料作直接促銷用途,或(ii)將閣下的個人資料提供予其他人士或公司作其直接促銷用途。
9. 就直接促銷而言,本公司擬:
- 使用本公司不時持有的閣下姓名、聯絡資料、服務及產品組合資料、財務背景及人口統計資料作直接促銷用途;銷售本公司、本集團其他成員及/或本公司之業務夥伴(即以下產品及服務的供應商)不時提供的下列服務及產品:
 - 保險服務及產品;
 - 財富管理服務及產品;
 - 退休金、投資、經紀、財務諮詢、信貸及其他金融服務及產品;
 - 健康檢查及健康服務及產品;
 - 媒體、娛樂及電信服務;
 - 獎賞、客戶忠誠或優惠計劃及相關服務及產品;及
 - 為慈善及/或非牟利用途的捐款及捐贈。
 - 將閣下的姓名及聯絡資料提供予本集團任何成員及/或本公司之業務夥伴,讓其用於直接促銷上文第9(i)段所載的服務或產品(如為業務夥伴,則包括作金錢或其他商業利益)。
- 若閣下不希望本公司使用閣下的個人資料,或將閣下的個人資料提供予本集團的其他成員及/或本公司的業務夥伴作直接促銷用途(上文第9段),請在以下有關方格內加上剔(✓)號,藉以行使閣下不同意此項安排的權利。
- 請不要將直接促銷資料發給本人。
請不要將本人的個人資料提供予其他人士或公司作其直接促銷用途。
10. 閣下亦可於任何時間致函本公司以下地址,藉以拒絕直接促銷。
11. 為達成上文第5及第9段所列出的目的,本公司可能將閣下的個人資料轉移、披露、讓其查閱或與上文第6及第9(ii)段所列的各方共同使用及閣下知悉有關一方可能設在香港以外的地方及閣下的個人資料可能被轉往的地方未必設有與《個人資料(私隱)條例》大致相同或用作同一用途的資料保護法。
12. 根據《個人資料(私隱)條例》,閣下有權要求查閱本公司所持有閣下的個人資料,並要求改正閣下的不正確個人資料及本公司有權就處理及遵行閣下的查閱資料要求而收取合理費用。
13. 查閱或改正閣下的個人資料要求,應以書面形式向下列人士提出:
- 資料保護主任
富衛人壽保險(百慕達)有限公司
香港德輔道中308號富衛金融中心1樓
- 如閣下有任何疑問,敬請致電本公司之客戶服務熱線3123 3123。
14. 中英文本如有歧異,概以英文本為準。
15. 本公司保留隨時增補、更改、更新及修訂本聲明之權利,並任何更改將於發出通知時起生效。
- 本人已細閱及本人明白及接受本收集個人資料聲明。本人同意把本人的個人資料轉移至香港境外,並本人明白本人的個人資料未必可以獲得與在香港相同或類似程度的保障。
- 簽名: _____
- 姓名: _____
(申請人/獲發本聲明人士姓名)
- 香港身份證/護照編號: _____