

# Switch and redirection form

## 轉換投資選擇及改變供款配置表格

Before completing this form please refer to the 'Switch and redirection help guide'. Please use blue or black ink and write clearly in **CAPITAL** letters. Any unclear instruction will not be performed. A list of investment choices and their currencies is available on [www.zurich.com.hk](http://www.zurich.com.hk). Please note that no switches or redirections can be made where the policyholder(s) is/are resident in the United States including any United States federally controlled territory.

在填寫本表格前，請參閱「轉換投資選擇及改變供款配置指引」。請用藍色或黑色原子筆，用**英文大楷**清晰填寫資料。任何不清楚的指示將不獲執行。投資選擇及其貨幣的名單可於[www.zurich.com.hk](http://www.zurich.com.hk)瀏覽。請注意，若保單持有人是美國（包括任何受美國聯邦管轄領土）的居民，則不可轉換投資選擇或改變供款配置。

Switch only: complete sections 1, 2, 4 and 5. Redirect only: complete sections 1, 3, 4 and 5. Switch and redirect: complete sections 1, 2, 3, 4 and 5.  
若僅轉換投資選擇：請填寫第1、2、4及5節。若僅改變供款配置：請填寫第1、3、4及5節。若轉換投資選擇及改變供款配置：請填寫第1、2、3、4及5節。

### Important notes 重要事項：

Your investment in the investment choices by way of switching-in, redirection of regular premium and top-up premium shall match your risk appetite indicated in your latest risk profile questionnaire.

閣下更改投資選擇如轉入、轉換定期保費配置及額外保費投資須符合 閣下最近遞交的風險承擔能力問卷所顯示的能承擔的風險程度。

If your investment in the investment choices by way of switching-in, redirection of regular premium and top-up premium does not match with your risk appetite, you may be exposed to higher risks and subject to greater investment loss.

如 閣下的投資選擇如轉入、轉換定期保費配置及額外保費投資與 閣下的風險類別不相符， 閣下可能會承受更高的風險及受到更大的投資虧損。

Your risk profile questionnaire will be valid for 12 months from the date the same is signed. Please note that you must have a valid risk profile questionnaire in our record when you submit your instructions for switching, redirection of regular premium and top-up premium. In the absence of a valid risk profile questionnaire, we will not be able to process your instructions.

風險承擔能力問卷的有效期為由簽署日起計十二個月。請注意當 閣下轉入、轉換定期保費配置及額外保費投資時，我們的紀錄中必須存有 閣下有效的風險承擔能力問卷。如沒有有效的風險承擔能力問卷，我們將無法處理 閣下的指示。

Please read the information of the underlying investment choices as set out in the relevant investment choice brochure and principal brochure, as the case maybe, before you submit this request for investment choice change.

在提交投資選擇更改前，請 閣下閱讀相關投資選擇手冊和主要推銷刊物相關投資選擇的資訊。

## 1 Policy details 保單詳情

I/We authorize you to change the investment choice holding of the following policy:

本人/本人等授權您轉換以下保單所持的投資選擇：

Policy no.:  
保單號碼：

Scheme no. (corporate clients only):  
計劃編號（僅適用於企業客戶）：

## 2 Switch present investment choice holding to new investment choice holding 將現時所持投資選擇轉換為新投資選擇

Sell from present investment choice holding/Switch from: 賣出現時所持有的投資選擇/轉換自：	Buy into new investment choice holding/Switch to: 買入新的投資選擇/轉換至：
Five character investment choice code % 由五個英文字母組成的投資選擇代碼 % (For example 10.00%) (如10.00%)	Five character investment choice code % 由五個英文字母組成的投資選擇代碼 % (For example 10.00%) (如10.00%)

Please click to automatically calculate the total  
請點選此處以自動計算總額

Total  
總計

## 3 Redirect future payments 改變未來供款配置

Invest your next regular premium into: 把您未來的定期供款投資於：
Five character investment choice code % 由五個英文字母組成的投資選擇代碼 % (For example 10.00%) (如10.00%)

Please click to automatically calculate the total  
請點選此處以自動計算總額

Total  
總計

## 4 Suitability 適合性

Unless the following confirmation is specified, any request for investing in an investment choice that carries a risk level higher than your risk tolerance will not be accepted.

除非閣下作出以下的確認，否則任何投資於風險評級高於閣下的風險承擔能力的投資選擇之申請均不會被接納。

Despite the fact that the investment choice(s) that I intend to invest in may not be suitable for me based on my disclosed current needs and risk profile, etc. as indicated in my financial needs analysis and risk profile questionnaire, I confirm that it is my intention and desire to proceed with my request herein. I understand that I may be exposed to higher risks and subject to greater investment loss. 儘管根據本人於財務需要分析及風險承擔能力問卷所披露的現時需要及投資風險等概況，本人欲投資的投資選擇可能並不適合本人，但本人確認本人仍打算及意欲繼續本人於此提出的要求。本人明白本人可能會承受更高的風險及受到更大的投資虧損。

## 5 Declaration 聲明

I hereby declare and confirm as follows:

本人聲明及確認以下事項：

1. I understand you will not be able to process my request for investment choice change if I do not have a valid risk profile questionnaire. I further understand and agree that you will not be liable for any loss which I may suffer as a result of your not being able to process my request as such.  
本人明白如果本人沒有有效的風險承擔問卷，本人的投資選擇更改有可能不被接納。本人亦明白及同意對於無法進行投資選擇更改以致本人可能遭受的任何損失，貴公司概不承擔任何責任。
2. I understand you may not be able to process my instructions for investment choice change according to the time set out in the Important Note if the investment choice(s) selected by me herein does not match my risk appetite indicated in my latest risk profiling questionnaire. I understand and agree that you will not be liable for any loss which I may suffer as a result of such delay.  
本人明白如本人在此選擇的投資選擇與本人最新的投資承擔風險問卷中所示的風險程度有所不符，有關的投資選擇更改有可能未能根據於重要事項所述的辦理時間處理。本人明白及同意因該延遲以致本人可能遭受的任何損失，貴公司概不承擔任何責任。

**Please make sure you have a valid risk profile questionnaire, which will be valid for one year from the completion date of the risk profile questionnaire. Your request will be REJECTED if you do not have a valid risk profile questionnaire.**  
請確保閣下持有有效的風險承擔能力問卷，有關問卷的有效期為完成日起計一年。如閣下沒有有效的風險承擔能力問卷，閣下的申請將會被拒絕。

Please ensure that instructions for joint policies are signed by both parties. 請確保聯名保單的書面指示由雙方簽署。

Please note that for joint policies, both parties are required to complete the risk profile questionnaire and the lower risk appetite will be used for the suitability check. 請注意，若保單為聯名保單，雙方均需填寫風險承擔能力問卷，而較低的風險類別將會用於合適性檢查。

Signature of policyholder/  
authorized signatory 1  
第一保單持有人／獲授權簽署人簽署

Signature of policyholder/  
authorized signatory 2  
第二保單持有人／獲授權簽署人簽署

Print name  
姓名（請以正楷填寫）

Print name  
姓名（請以正楷填寫）

Email address 電郵地址

Email address 電郵地址

Date signed 簽署日期  
Day日 Month月 Year年  
□□ □□ □□ □□ □□ □□ □□

Date signed 簽署日期  
Day日 Month月 Year年  
□□ □□ □□ □□ □□ □□ □□

Financial investment adviser name 基金投資顧問名稱

Job title 職銜

Relevant Financial Professional 相關理財顧問

**PLEASE SIGN & RETURN IMMEDIATELY.** 請於簽署後即時遞交。

**PLEASE DO NOT SIGN ON BLANK FORM.** 請勿於空白表格簽署。

In the event of any discrepancy or inconsistencies between the English and Chinese versions of this form, the English version shall prevail. 如此表格之中英文版本有任何歧異或不一致，概以英文版為準。

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於人島的註冊號碼為20126C。

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蘇黎世



Policy no. 保單號碼

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## Risk profile questionnaire 風險承擔能力問卷

Please complete the form in **ENGLISH BLOCK LETTERS**. 請用英文正楷填妥表格。  
Please **X** the appropriate box. 請於適當空格內加上「X」號。

Full name of policyholder/proposer 保單持有人 / 投保人姓名

Family name  
姓

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Given name  
名

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### Section A 甲部 : Basic information and investment risk 基本資料及投資風險

1. What is your age?  
您的年齡介乎?  
 > 65 (1)     51 – 65 (3)     36 – 50 (5)     18 – 35 (7)
2. How many years of investment experience do you have? Investment experience includes but not limited to Mandatory Provident Fund (MPF), mutual funds investment and stock trading experience.  
您有多少年投資經驗? 投資經驗包括但不限於強積金、基金投資及股票買賣。  
 NIL 沒有 (0)     1 – 3 year(s) 年 (1)     4 – 6 years 年 (2)     7 – 10 years 年 (5)     >10 years 年 (7)
3. What percentage of your income is available for investment now?  
現時您可由收入中分配多少百分比的金額進行投資?  
 < 10% (1)     10% – 15% (2)     16% – 25% (3)     > 25% (4)
4. What portion of your overall investment is invested in stocks or equity funds?  
您投資於股票或股票基金的總值佔個人投資總額的比率為何?  
 0% – 20% (1)     21% – 40% (2)     41% – 60% (3)     > 60% (4)
5. Which of the following investment return objective best reflects your personal investment goal?  
下列哪一項投資回報目標，最為貼近您的個人投資目標?  
 Capital preservation with a return similar to the bank deposit rate. (1)  
資本保障，同時賺取貼近銀行存款利率的回報。(1)  
 Earn a return which is stable and slightly above the bank deposit rate. (2)  
期望賺取穩定並稍微高於銀行存款利率的回報。(2)  
 Stable, balance income with capital growth. (3)  
期望賺取穩定、均衡的收入之餘亦可讓資本增值。(3)  
 Maximize capital growth as soon as possible. (5)  
期望賺取最高的回報及資本增值。(5)
6. Assume the inflation rate rises by 3% a year, how would you describe your expected income over the next 5 years?  
假設每年的通脹率為3%，下列哪一項最能形容您預期未來5年之收入?  
 I believe my income will decrease due to work or personal reasons. (1)  
因為工作或私人原因，預期收入下降。(1)  
 I believe my income increment will be the same as the inflation rate. (2)  
預期入息增幅與通脹同步。(2)  
 I believe my income increment can stay just ahead of the inflation rate. (3)  
預期入息增幅稍高於通脹。(3)  
 I believe my income will increase far more than the inflation rate. (5)  
預期收入能遠超通脹。(5)

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7. The value of investments may increase or decrease. How would you describe your acceptance and attitude towards investment market fluctuations?  
投資價值可升亦可跌，您會怎樣形容您對投資市場風險的接受能力及態度？
- Concern that income will be affected by market fluctuations, and hence unwilling to take up any risk. (1)  
憂慮市場波動影響收入，不願意承擔任何風險。(1)
- Accept minor fluctuations for the opportunity to grow capital. (2)  
願意承擔輕微程度市場風險，以換取資金增值的機會。(2)
- Accept moderate fluctuations for the opportunity of assets enhancement and better capital returns. (3)  
願意承擔中等程度市場風險，以加強資金增值及投資回報的機會。(3)
- Accept higher risks from market fluctuations, believe in long-term investing can average out short-term volatility and higher potential growth can be achieved accordingly. (5)  
願意承擔較高度市場風險，相信短期波動無礙長線投資以獲取最大潛在回報。(5)
8. Assume that you have already made an investment over the past 5 years with an annual return of 10%. If you have experienced a loss of 30% this year, and the picture in the global economy remains uncertain, what would you do?  
假設您於過去5年的投資回報為每年10%，惟今年的投資項目損失了近30%，而後市又不明朗，您會怎樣做？
- I would switch all my investments now to relatively stable investment vehicles. (1)  
即時將全部投資轉到相對穩定的投資項目。(1)
- I would switch part, but not all, of my investment now to relatively stable investment vehicles. (2)  
即時將部份投資轉到相對穩定的投資項目。(2)
- I would take no immediate actions, keeping present investment unchanged. (3)  
沒有任何即時行動，維持投資項目不變。(3)
- I would make an investment when the investment prices are low. (5)  
當投資單位價格低時會再買入投資。(5)
9. How many months of your share of household expenses have you put aside to meet unforeseen events?  
您儲備以作不時之需的金額，大約相等於多少個月您所負擔的家庭開支？
- Have no amount set aside for unforeseen events. (1)  
我沒有儲備金額以作不時之需。(1)
- Between 3 months and 6 months. (2)  
3個月至6個月。(2)
- Between 6 months and 9 months. (3)  
6個月至9個月。(3)
- Over 9 months. (4)  
多過9個月。(4)
10. It is generally true that the longer the investment horizon, the higher the risk an investor can tolerate. What time horizon would you generally be comfortable with when investing in products the value of which can fluctuate?  
在一般情況下，投資的年期越長，可承受的風險越高。當投資於價值波動之投資產品時，您會願意接受下列哪項投資年期？
- Less than 1 year (1)  
少過1年(1)
- Between 1 and 5 years (2)  
1年至5年(2)
- Between 6 and 10 years (3)  
6年至10年(3)
- Over 10 years (4)  
多過10年(4)
11. How do you obtain investment knowledge?  
您如何獲得投資知識？
- (I) I do not have any investment knowledge  
我並沒有任何投資知識
- (II) Through seeking advices from relatives and friends  
向親屬及朋友尋求意見
- (III) Through reading financial and investment news/articles and/or attending investment seminars  
透過閱讀財經及投資新聞(或文章)，及/或出席投資講座
- (IV) Through education or working experience acquired from education institutions (e.g. colleges, universities, vocational institutions, etc.), professional organizations, banks, financial institutions or other organizations  
透過教育機構(如專上學院、大學、職業教育學院等)、專業團體、銀行、金融機構、或其他團體裡的教育或工作經驗
- (I) only (1)  
只有(I)(1)
- Any one channel among (II), (III) or (IV) (2)  
(II)、(III)或(IV)中任何一種途徑(2)
- Any two channels among (II), (III) or (IV) (3)  
(II)、(III)或(IV)中任何兩種途徑(3)
- All of (II), (III) and (IV) (5)  
(II)、(III)及(IV)所有途徑(5)

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## 12. Have you had any investment experience in the following financial products?

您是否擁有以下金融產品的投資經驗？

- (I) I do not have any investment experience and/or I only have bank deposits only  
我並沒有任何投資經驗及／或我只擁有銀行存款
- (II) Foreign exchange and/or non-capital protected structured products  
外匯及／或非保本結構性投資產品
- (III) Retirement funds, investment funds and/or investment-linked assurance schemes  
退休基金、投資基金及／或與投資有關的人壽保險計劃
- (IV) Direct bonds, stocks and/or commodities  
債券、股票及／或商品

- (I) only (1)  
只有 (I) (1)
- Any one category among (II), (III) or (IV) (2)  
(II)、(III) 或 (IV) 中任何一類 (2)
- Any two categories among (II), (III) or (IV) (3)  
(II)、(III) 或 (IV) 中任何兩類 (3)
- All of (II), (III) and (IV) (5)  
(II)、(III) 或 (IV) 所有種類 (5)

## Section B 乙部： Investment knowledge and experience 投資知識與經驗

## 1. \*Do you have any knowledge in derivatives based on education or working experience acquired from education institutions (e.g. colleges, universities, vocational institutions, etc.), professional organizations, banks, financial institutions or other organizations?

您曾否透過教育機構（如專上學院、大學、職業教育學院等）、專業團體、銀行、金融機構、或其他團體裡的教育或工作經驗而獲取衍生工具產品的知識？

Yes 是  No 否

\* If the answer for question 11 in section A is "Only (I)", you do not need to answer this question and we will not take into account the answer of this question. The default answer for this question would be "No".

如甲部第 11 條問題的答案為「只有 (I)」，您並不需要回答此問題，我們亦不會考慮此問題的答案，而此問題的預設答案將為「否」。

## 2. \*Do you have any prior investment experience in derivatives (e.g., principal protected structured products, equity/interest rate/foreign exchange-linked structured products, currency linked deposits, options, futures, warrants, callable bull bear contracts, share margin or foreign exchange margin, etc.) and fully understand the underlying risks of such investments?

您曾否投資於衍生工具產品（如保本結構性投資產品、與股票／利率／貨幣掛鉤之結構性投資產品、貨幣掛鉤存款、期權、期貨、認股權證、可贖回牛證熊證、股票孖展或外匯孖展等），並完全清楚明白相關投資風險？

Yes 是  No 否

\* If the answer for question 12 in section A is "Only (I)", you do not need to answer this question and we will not take into account the answer of this question. The default answer for this question would be "No".

如甲部第 12 條問題的答案為「只有 (I)」，您並不需要回答此問題，我們亦不會考慮此問題的答案，而此問題的預設答案將為「否」。

According to the internal suitability guidelines, if either question in section B is answered "No", investment choices of the corresponding underlying investment with derivative exposure are not suitable for the customers.

根據內部合適性指引，如乙部其中一條問題的答案為「否」，則相應的相關投資有衍生風險的投資選擇並不適合該客戶。

## Total score 總分數

- < 21  
Risk appetite: 1<sup>1</sup>  
風險類別：1<sup>1</sup>
- 21 – 30  
Risk appetite: 2<sup>2</sup>  
風險類別：2<sup>2</sup>
- 31 – 39  
Risk appetite: 3<sup>3</sup>  
風險類別：3<sup>3</sup>
- 40 – 49  
Risk appetite: 4<sup>4</sup>  
風險類別：4<sup>4</sup>
- > 49  
Risk appetite: 5<sup>5</sup>  
風險類別：5<sup>5</sup>

<sup>1</sup> According to the internal suitability guidelines, only investment choice(s) in risk level 1 is/are suitable for customers who are classified as 1 in their risk appetites.  
根據內部合適性指引，風險類別為「1」的客戶只適合風險評級為 1 的投資選擇。

<sup>2</sup> According to the internal suitability guidelines, only investment choice(s) in risk level 1 and 2 is/are suitable for customers who are classified as 2 in their risk appetites.  
根據內部合適性指引，風險類別為「2」的客戶只適合風險評級為 1 及 2 的投資選擇。

<sup>3</sup> According to the internal suitability guidelines, only investment choice(s) in risk level 1, 2 and 3 is/are suitable for customers who are classified as 3 in their risk appetites.  
根據內部合適性指引，風險類別為「3」的客戶只適合風險評級為 1、2 及 3 的投資選擇。

<sup>4</sup> According to the internal suitability guidelines, only investment choice(s) in risk level 1, 2, 3 and 4 is/are suitable for customers who are classified as 4 in their risk appetites.  
根據內部合適性指引，風險類別為「4」的客戶只適合風險評級為 1、2、3 及 4 的投資選擇。

<sup>5</sup> No restriction.  
沒有限制。

The internal suitability guideline is applicable to both policyholders for policies with joint policyholders. As a result, if the risk appetites of both policyholders are different, we will take the **lower** risk appetite to evaluate the suitability of the selected investment choices. Investment choices of the corresponding underlying investment with derivative exposure are available for selection if **both** policyholders are suitable for those investment choices. 如保單為聯名保單持有人，內部合適性指引適用於所有保單持有人。所以，如兩位客戶的風險類別不同，我們則會取其較低的風險類別以評估已選投資選擇的適合性。相應的相關投資有衍生風險的投資選擇只適合於兩位客戶均適合選擇該等投資選擇的保單。

The objective of this risk profile questionnaire is for an assessment of a customer's investment risk appetite, and to determine if a particular investment-linked assurance schemes and the investment choice(s) selected is/are suitable for the customer, before making a recommendation. 此風險承擔能力問卷旨在評估客戶的投資風險類別，並於提供建議前，釐定特定與投資有關的人壽保險計劃及已選擇的投資選擇是否適合客戶。



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Zurich International Life Limited ("Zurich") offer you a series of different investment-linked assurance scheme(s) and investment choices which you can choose to meet your investment objectives and needs. Please refer to offering documents of the relevant underlying funds/investments to which the investment choices under the investment-linked assurance scheme are linked; and the product brochures and investment choice brochures of the relevant investment-linked assurance scheme(s) for further information including fees and charges.

蘇黎世國際人壽保險有限公司(「蘇黎世」)備有一系列不同的與投資有關的人壽保險計劃及投資選擇，以切合您的不同投資目標及需要。有關更多資料(包括費用及收費)，請參閱與投資有關的人壽保險計劃下之各投資選擇相應的相關基金/投資的銷售文件及有關與投資有關的人壽保險計劃之產品小冊子及投資選擇資料冊。

## Section C 丙部： Declaration 聲明

I hereby declare that I acknowledge, understand and agree as follows:

本人在此聲明本人確認、明白及同意如下：

- The information provided by me in this questionnaire is up-to-date, true and accurate to the best of my knowledge. I understand my failure to provide up-to-date, true and accurate information may affect any suitability assessment conducted by Zurich.  
本人於此問卷所提供的資料，就本人所知均為最新、真實及準確。本人明白如本人未能提供最新、真實及準確的資料，將會影響蘇黎世進行的合適性評估。
- Investments involve risks and that past performance is not indicative of future result, prices can go up and down.  
投資涉及風險，過往表現並非未來業績的指標，而價格可升亦可跌。
- This questionnaire only serves as a reference when determining my risk profile, and the result indicated herein does not constitute offer or solicitation to buy or sell or recommendation of any product and should not be considered as investment advice.  
此問卷只作為決定本人的風險承擔能力時的參考，及於此顯示的結果並不構成要約或招攬購買，出售或推薦任何產品，有關結果亦不應被視為投資建議。
- This questionnaire is valid for 12 months from the date on which it is signed. I undertake to advise Zurich or the licensed insurance intermediary of any material change in circumstances which would affect my risk profile, and to re-perform this questionnaire as soon as possible if there is any such change.  
本問卷的有效期為簽署日起計 12 個月。本人承諾，如有任何重大情況變動以致影響本人的風險承擔能力，本人會通知蘇黎世或本人的持牌保險中介人有關情況及儘快重新填寫本問卷。

Your risk appetite and/or your suitability to select the investment choices of the corresponding underlying investment with derivative exposure will be updated, if required, as soon as practicable after we receive the completed and duly signed risk profile questionnaire from you to all of your policies issued by Zurich, upon our acceptance. Your investment on investment choices by way of switching-in, redirection of regular premium and top-up premium will be subject to the latest results on the risk profile questionnaire, which should be valid for one (1) year.

我們將會於收到客戶已填妥及簽署的風險承擔能力問卷及我們批核後，為客戶於蘇黎世續發的保單下儘快更新(如需要)客戶的風險類別及/或客戶選擇連繫投資包括衍生工具的投資選擇的適合性。客戶以轉入、轉換定期保費配置及額外保費投資於投資選擇將會以客戶最新的風險承擔能力問卷結果以作釐定。風險承擔能力問卷結果的有效期將為一年。

You are not allowed to opt out or deviate in any respect from the process of completing this risk profile questionnaire. Zurich is required not to accept the application if you choose to opt out or deviate from the process of completing this risk profile questionnaire.

閣下不能選擇不填報風險承擔能力問卷。倘若閣下選擇不填報此風險承擔能力問卷，蘇黎世將不能接受閣下之申請。

Name of policyholder/proposer 保單持有人/投保人姓名		Name of licensed insurance intermediary 持牌保險中介人姓名																	
Signature of policyholder/proposer 保單持有人/投保人簽署		Signature of the licensed insurance intermediary 持牌保險中介人簽署																	
Date signed 簽署日期	Day日 Month月 Year年 <table border="1"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>									Date signed 簽署日期	Day日 Month月 Year年 <table border="1"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>								

**PLEASE SIGN AND RETURN WITHIN ONE MONTH. 請簽署後於一個月內遞交。**

**PLEASE DO NOT SIGN ON BLANK FORM. 請勿在空白表格上簽署。**

Zurich International Life is a business name of Zurich International Life Limited (a company incorporated in the Isle of Man with limited liability) which provides life assurance, investment and protection products and is authorised by the Isle of Man Financial Services Authority.

Registered in the Isle of Man number 20126C.

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蘇黎世國際人壽保險是蘇黎世國際人壽保險有限公司(於人島註冊成立之有限公司)的商業名稱。蘇黎世國際人壽保險有限公司為人島 Financial Services Authority 所認可，提供人壽保險、投資及保障產品。

於人島的註冊號碼為 20126C。

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