

Origin of wealth 財富來源

Guidelines and questionnaire for individual business 為個別業務而設的指引和問卷

This document must be read in conjunction with your licensed insurance intermediary.

請務必與閣下的持牌保險中介人一起細閱本文件。

Section A 部：Origin of wealth guidelines 財富來源指引

Section B 部：Origin of wealth questionnaire 財富來源問卷

Section A 部：Origin of wealth guidelines 財富來源指引

- These guidelines provide you with **premium levels above which we will require documentary evidence** to support the information given in the origin of wealth questionnaire.
若閣下的保費高於本指引所述的水平，我們將要求提供證明文件，以證明在財富來源問卷所提供的資料。
- The list of countries and their respective categories ("List") is available at zurich.com.hk/oow. The category beside each country indicates the premium level for that particular country. The premium levels are shown in US dollar, sterling and euro, but we will accept payments in any freely convertible currency at the prevailing exchange rate.
請於 zurich.com.hk/oow 查閱國家名單與其相對應類別（「名單」）。於每個國家旁的類別均顯示該個別國家的保費水平。保費水平以美元、英鎊和歐元列示，但我們將按現行匯率接受以任何可自由兌換貨幣支付的款項。
- Please note:** The premium levels indicated below include any contributions to existing policies.
請注意：下文所示的保費水平包括現有保單的任何供款。
- Please ensure that the information given on the origin of wealth questionnaire is complete and consistent with the information on the application form.
請確保閣下於財富來源問卷提供完整的資料，並與申請表格所示的資料相符。
- For the purposes of applying these guidelines, the "country" refers to your country of residence. The inclusion of countries in the List should not be taken as confirmation that business will be accepted from these regions. You should contact your licensed insurance intermediary or call our Customer Care Team if you need to confirm business acceptance from certain territories.
就應用本指引而言，「國家」是指閣下的居住國家。於名單內的國家不應被視為已確認獲接受業務的國家。若閣下需要確認若干地區會否獲接受業務，應諮詢閣下的持牌保險中介人或請聯絡我們的客戶服務部。

Category 1 類別 1

Single premium 整付保費：

USD 1,000,000/GBP 780,000/EUR 900,000
1,000,000 美元／780,000 英鎊／900,000 歐元

Yearly regular premium 年度定期保費：

USD 100,000/GBP 78,000/EUR 90,000
100,000 美元／78,000 英鎊／90,000 歐元

Category 2 類別 2

Single premium 整付保費：

USD 500,000/GBP 390,000/EUR 450,000
500,000 美元／390,000 英鎊／450,000 歐元

Yearly regular premium 年度定期保費：

USD 50,000/GBP 39,000/EUR 45,000
50,000 美元／39,000 英鎊／45,000 歐元

Category 3 類別 3

Single premium 整付保費：

USD 300,000/GBP 230,000/EUR 270,000
300,000 美元／230,000 英鎊／270,000 歐元

Yearly regular premium 年度定期保費：

USD 30,000/GBP 23,000/EUR 27,000
30,000 美元／23,000 英鎊／27,000 歐元

- We reserve the right to request additional supporting information where your total holdings with us is below the limits specified.
若閣下在本公司的總單位低於訂明的限額，我們保留要求提供額外證明資料的權利。
- If you are unsure, please call our Customer Care Team on +852 3405 7150 or email us at helppoint.hk@hk.zurich.com or write to us at 25-26/F, One Island East, 18 Westlands Road, Island East, Hong Kong.
若閣下未能確定上述事宜，請致電我們的客戶服務部熱線 +852 3405 7150、電郵至 helppoint.hk@hk.zurich.com 或郵寄至香港港島東華蘭路 18 號港島東中心 25-26 樓。

Origin of wealth guidelines (continued) 財富來源指引 (續)

Below table provides details of:

以下列表提供以下詳情：

- (i) what origin of wealth information is required if the premium is below the amounts detailed on page 1 (lower risk business), **and** 如保費低於第 1 頁詳述金額 (風險較低的金額) 所需的財富來源資料；及
- (ii) the documentary evidence required if the premium **exceeds** the amounts detailed on page 1 (higher risk business). 如保費高於第 1 頁詳述金額 (風險較高的金額) 所需的證明文件。

If the country of residence is not in our List, it should be risk assessed as 'category 3'. However, if you need further advice please contact our Customer Care Team.

如居住國家未有列於名單，其風險應被評估為「類別 3」。然而，若閣下需要進一步的意見，請聯絡我們的客戶服務部。

Note 註

All documents submitted should either be original or a copy certified by a suitable certifier.

提交的所有文件均須為正本或由適當認證人核認的副本。

Generic source of wealth 一般財富來源	Lower risk business 風險較低的金額 Information to be detailed on the origin of wealth questionnaire 在財富來源問卷中詳述的資料	Higher risk business 風險較高的金額 Examples of documentary evidence of source of wealth in addition to the information requested for lower risk business 除提供風險較低金額所要求的資料外，還須呈交以下財富來源證明文件
Yearly income and/or bonus amount 年度收入及／或花紅金額	<ul style="list-style-type: none"> Employer's name and address 僱主名稱及地址 Employer's telephone number 僱主電話號碼 Yearly income and/or bonus amount 年度收入及／或花紅金額 	<ul style="list-style-type: none"> Certified copy of recent financial accounts or Income tax assessment document if self-employed or 如屬自僱人士，最近的財務賬目或入息稅評稅文件的經核證副本，或 Confirmation from employer of income on letterheaded paper which must be an original or 僱主以公司信紙確認本人收入的函件 — 必須為正本，或 Bank statements clearly showing receipt of most recent regular salary payments from named employer 清楚列明最近由所述僱主存入的定期薪金的銀行結單
Shares or other investment holdings 股票或所持的其他投資	<ul style="list-style-type: none"> Description of shares/units/deposits 股票／單位／存款的詳情 Value of shares/investment holdings 股票／所持投資的價值 	<ul style="list-style-type: none"> Investment holdings/savings certificates, contract notes or statements or 所持投資／存款證、成交單據或報表，或 Confirmation from the relevant investment company or 相關投資公司的確認書，或 Signed letter detailing funds from a regulated accountant or 由受監管會計師簽發並列載資金詳情的函件或 Bank statement showing receipt of funds by investment company 顯示投資公司收取資金的銀行結單
Property sale 物業出售	<ul style="list-style-type: none"> Details/address of property 物業詳情／地址 Date of sale 出售日期 Total sale amount 總出售金額 	<ul style="list-style-type: none"> Signed letter from solicitor or 律師簽發的函件，或 Signed letter from estate agent (if applicable) or 地產經紀 (如適用) 簽發的函件，或 Sale contract 出售合約

Origin of wealth guidelines (continued) 財富來源指引 (續)

Generic source of wealth 一般財富來源	Lower risk business 風險較低的金額 Information to be detailed on the origin of wealth questionnaire 在財富來源問卷中詳述的資料	Higher risk business 風險較高的金額 Examples of documentary evidence of source of wealth in addition to the information requested for lower risk business 除提供風險較低金額所要求的資料外，還須呈交以下財富來源證明文件
Maturing investments or policy claim 即將到期的投資或保單索償	<ul style="list-style-type: none"> Description of maturing investments 即將到期的投資的詳情 Maturing proceeds 即將到期的收益 Date of maturity 到期日 	<ul style="list-style-type: none"> Letter from previous investment company regarding notification of proceeds of claim or 前投資公司發出的索償款項通知函件，或 Chargeable Event Certificate 應課稅事件證明
Company sale 公司出售	<ul style="list-style-type: none"> Name and nature of company 公司名稱及性質 Date of sale 出售日期 Total amount 總金額 Applicant's share 申請人的份額 	<ul style="list-style-type: none"> Signed letter from solicitor or 律師簽發的函件，或 Signed letter from regulated accountant or 受監管會計師簽發的函件，或 Copy of contract of sale and sight of investment monies on bank statement or 成交單據副本及銀行結單上的投資金額，或 Copies of media coverage (if applicable) as supporting evidence 作為證明的媒體報道 (如適用) 副本
Inheritance 遺產	<ul style="list-style-type: none"> Details of inheritance 遺產詳情 Date received 獲取日期 Total amount 總金額 	<ul style="list-style-type: none"> Grant of probate (with a copy of the will) which must include the value of the estate or 列明遺產價值的授予遺囑認證書 (連同遺囑副本)，或 Solicitor's letter or letter from trustees of an estate 律師函件或遺產信託人函件
Geared loan 貸款	<ul style="list-style-type: none"> Name and nature of loan provider 貸款提供者的姓名及性質 Date of loan 貸款日期 Total amount 總金額 	<ul style="list-style-type: none"> Loan agreement or 貸款協議，或 Recent loan statements 近期的貸款結單
Gift 餽贈	<ul style="list-style-type: none"> Date received 獲取日期 Total amount 總金額 Reason for gift 獲餽贈的原因 Relationship to applicant 與申請人的關係 Confirmation of the donors origin of wealth details (i.e. where did the donor generate the funds from that have been gifted to you e.g. salary, house sale, etc.) 餽贈者的財富來源詳情確認書 (即餽贈者向閣下作出餽贈的資金來源，例如薪酬、出售房屋等) 	<ul style="list-style-type: none"> Letter from donor confirming details of gift and 餽贈者就確認禮品詳情發出的函件，及 Certified copy of the donor's primary ID documentation and 餽贈者主要身分證明文件的經核證副本，及 Suitable documentation to evidence the donor's origin of wealth (as per the origin of wealth guidelines) 證明餽贈者財富來源的適當文件 (如財富來源指引所述)
Lottery/Betting/Casino win 彩票／博彩／賭場獎金	<ul style="list-style-type: none"> Details of win 獎金詳情 Date of win 獲獎日期 Total amount 總金額 Details of which organisation 組織詳情 	<ul style="list-style-type: none"> Letter from relevant organisation (lottery headquarters/betting shop/casino) or 相關組織 (彩票總部／博彩公司／賭場) 發出的函件，或 Bank statement showing funds deposited by company name or 顯示公司存入款項的銀行結單，或 Copies of media coverage (if applicable) as supporting evidence 作為證明的媒體報道 (如適用) 副本
Compensation payment 賠償付款	<ul style="list-style-type: none"> Date received 獲取日期 Total amount 總金額 Reason for payment 付款原因 	<ul style="list-style-type: none"> Letter/Court order from compensating body or 賠償機構的函件／法令，或 Solicitor's letter 律師函件
Corporate investments 公司投資	<ul style="list-style-type: none"> Nature of business 業務性質 Details of turnover 營業額詳情 	<ul style="list-style-type: none"> Reports and accounts or 報告及賬目，或 Accountant confirmation of nature of business and turnover 會計師就業務性質及營業額發出的確認書

Origin of wealth guidelines (continued) 財富來源指引 (續)

Generic source of wealth 一般財富來源	Lower risk business 風險較低的金額 Information to be detailed on the origin of wealth questionnaire 在財富來源問卷中詳述的資料	Higher risk business 風險較高的金額 Examples of documentary evidence of source of wealth in addition to the information requested for lower risk business 除提供風險較低金額所要求的資料外，還須呈交以下財富來源證明文件
Retirement income 退休收入	<ul style="list-style-type: none"> Retirement date 退休日期 Details of previous profession/occupation 過往專業／職業詳情 Name and address of last employer 前僱主的姓名及地址 Approximate figure of salary on retirement 退休時的概約薪酬 Pension income 退休收入 	<ul style="list-style-type: none"> Pension statement or 退休金報表，或 Letter from accountant or 會計師函件，或 Bank statements or 銀行結單，或 Savings account statement 儲蓄賬戶結單
Other monies 其他款項	<ul style="list-style-type: none"> Nature of source 來源性質 Amount 金額 Date received 獲取日期 From whom received 從哪一方獲取 	<ul style="list-style-type: none"> Appropriate supporting documentation or 適當的證明文件，或 Signed letter detailing funds from a regulated accountant 由受監管會計師簽發並列載資金詳情的函件

We recognize that each application is unique and it may be difficult for an application to fit into a specific category. We will, therefore, be happy to consider acceptance of other suitable documents as evidence of how your clients acquired the funds to be invested.

我們確認每項申請均具獨特性質，而一項申請可能難以符合特定類別。因此，我們將樂於考慮接受其他合適文件，作為閣下的客戶獲取其投資金額的來源證明。

For trust investments, the origin of all money under the trust should be provided, and the guidance above should be followed.

就信託投資，必須提供信託下所有款項的來源，並遵從上述指引。

Policy no.
保單號碼

Section B 部：Origin of wealth questionnaire 財富來源問卷

Important notes 重要事項

- Before completing this section please read the guidelines section carefully and discuss with your licensed insurance intermediary.
填寫此部分前，請細閱指引部分，並與閣下的持牌保險中介人討論。
- Please tick all the appropriate descriptions of how you have acquired the money to be invested and provide the details we ask for.
請剔選閣下如何獲取將用於投資的款項的所有適當描述，並提供我們要求的詳情。
- If your total payment across all policies/applications held with Zurich International Life exceeds the limits in the guidelines section, you will need to provide documentary evidence to support the reason(s) you give below. If you are an existing policyholder, your existing premium levels will be included for the purposes of calculating the limits for which documentary evidence is required. If both policyholders are joint payors, we require origin of wealth for both.
若閣下於蘇黎世國際人壽所持的所有保單／申請的總付款高於指引部分所述的限額，將需提供證明文件，以支持閣下在下文所提供的理由。若閣下是現有保單持有人，閣下的現有保費水平平均會用作計算限額，以決定是否需要呈交證明文件。若兩名保單持有人為聯名付款人，則我們需知悉兩者的財富來源。
- Please complete this form in English and ✓ the appropriate box.
請以英文填寫本表格及✓適用之方格。

Origin of wealth questionnaire (continued) 財富來源問卷 (續)

Unless otherwise specified, all amounts are assumed to be in Hong Kong dollar.
除非另有說明，所有金額均以港元計算。

How the payor acquired the money
付款人怎樣獲得資金

☐ Savings from income/salary/company profits/bonus 來自收入／薪金／公司盈利／花紅的儲蓄

Employer's/Company's name 僱主／公司名稱	Annual income ¹ 每年收入 ¹	Currency 貨幣
Employer's/Company's physical address 僱主／公司地址	Bonus amount 花紅金額	Currency 貨幣
Employer's/Company's telephone number 僱主／公司電話號碼	Number of years you have been saving 閣下的儲蓄年數	
Nature of company business 公司業務性質	Country of origin of wealth 財富來源國家	
Number of years employed with company 受僱於公司的年數		

¹ For a company, details of their profits should be entered instead.
¹ 就公司來說，應填寫其利潤詳情。

☐ Proceeds from shares/investment holdings/property sale 來自股票／所持投資／物業出售的收益

Details of shares/investment holdings/property sale 股票／所持投資／物業出售的詳情

Total value or amount of sale and currency 總值或出售金額及貨幣

Day 日 Month 月 Year 年

Date of sale 出售日期

Details/Address of property 物業詳情／地址

☐ Other 其他

Please provide details here if your contribution is from a source other than those listed above. Please include full details of where funds are from, dates, currency and amount.
若 閣下的供款來自上文所列者以外的來源，請提供詳情。請列載基金地區、日期、貨幣及金額的全部詳情。

Origin of wealth questionnaire (continued) 財富來源問卷 (續)

How the payor acquired the money – documentary evidence
付款人怎樣獲得資金 – 證明文件

If your payment exceeds the limits in the guidelines (section A), please ✓ the appropriate box to confirm the documents attached.
若閣下的付款金額高於指引 (A 部分) 所示的限額，請✓適用之方格以確認隨附的文件。

Please note: All documents submitted must be original or a copy certified by a suitable certifier.
請注意：提交的所有文件均須為正本或由適當認證人核證的副本。

☐ Savings from income/salary/company profits/bonus 來自收入／薪金／公司盈利／花紅的儲蓄

- ☐ A copy of my recent financial accounts (I am self-employed)
如屬自僱人士，最近的財務賬目的副本
- ☐ A letter on company letterhead from my employer confirming my income – this must be an original
僱主以公司信紙確認本人收入的函件 – 必須為正本
- ☐ Bank statements clearly showing receipt of my most recent regular salary payments from my employer
清楚列明最近由僱主存入定期薪金的銀行結單
- ☐ A certified copy of the latest annual report and accounts for the company
公司最新年報及賬目的經核證副本

☐ Proceeds from shares/investment holdings/property sale 來自股票／所持投資／物業出售的收益

- ☐ Investment holdings/Saving certificates, contract notes or statements showing sale of my shares
所持投資／存款證、顯示我出售股票的成交單據或結單
- ☐ Confirmation of sale from my investment company
我的投資公司的出售確認書
- ☐ Bank statement showing receipt of my sale proceeds
顯示我獲取出售收益的銀行結單
- ☐ Shares/Investment holdings only – signed letter from my accountant
股票／所持投資 – 由我的會計師簽發的函件
- ☐ Property sale only – signed letter from my solicitor/estate agent
物業出售 – 由我的律師／地產代理簽發的函件
- ☐ Chargeable event certificate for my matured investment
我的即將到期投資的應課稅事項證明
- ☐ Sale contract
出售合約

☐ Other – please provide the appropriate documentary evidence as defined on page 3
其他 – 請提供第 3 頁所界定的適當證明文件

Are you making any concurrent applications to other life offices?
閣下現時是否正同時向其他人壽保險公司提交申請？

☐ Yes 是 ☐ No 否

If “Yes”, please give details.
如「是」，請提供詳情。

Name of company 公司名稱	Type of policy 保單類別	Amount of cover 保障金額	Premium amount 保費金額	Policy term 保單年期

Documentary evidence – additional information
證明文件 – 其他資料

We recognise that each circumstance is unique and it may be difficult to fit into a specific category or situation. Please use this section if you want to provide further information or provide different reasons to those given above.
我們確認每個情況均具獨特性質，並可能難以符合特定類別或情況。若閣下有意提供進一步的資料，或提供有別於上文所述的不同原因，請填寫此部分。

Section C 部：Policyholder's declaration and data protection 保單持有人的聲明及資料保護

Declaration 聲明

I/We declare that the information provided on the origin of wealth is true and complete. I/We agree to provide Zurich International Life with any further information or documentary evidence in respect of the funds upon request. I/We further agree to Zurich International Life contacting any third party to obtain additional information on the investments, if required.

本人／我們聲明就財富來源提供的資料屬真確及完整。本人／我們同意應要求向蘇黎世國際人壽提供有關基金的任何其他資料或證明文件。本人／我們進一步同意蘇黎世國際人壽按需要接觸任何第三方，以獲取有關投資的其他資料。

Personal Information Collection Statement for Zurich International Life Limited

蘇黎世國際人壽保險有限公司之收集個人資料聲明

The personal information of customers (including policyholders, insured persons, beneficiaries, premium payors, trustees, policy assignees and claimants) collected or held by the Company from time to time, which also includes data collected or generated in the ordinary course of the Company's business and the continuation of relationship with the customer (such as claim information and medical history received from third parties), may be used by the Company and/or a company within its group ("Zurich Insurance Group") for the purposes **necessary** in providing services to the customers (otherwise the Company is unable to provide services to customers who fail to provide the required information).

由本公司不時收集或持有的客戶(包括保單持有人、受保人、受益人、保費付款人、信託人、保單受讓人及索償人)個人資料，其中亦包括在公司日常業務過程中以及就持續與客戶的關係而收集或產生的資料(例如從第三方收到的索償資料和病歷)，均可供本公司及／或其所屬集團(「蘇黎世保險集團」)內的公司使用作為向客戶提供服務而**必須**的用途(否則本公司將無法為未能提供所需資料的客戶提供服務)。

Please read carefully the details of the Company's privacy policy, together with its Addendum that applies if you are located in Mainland China, which is made available on our website at www.zurich.com.hk/pics or by scanning the QR code. You may also contact our Customer Care Hotline at +852 3405 7150 or insurance intermediaries for enquiries. 閣下之私隱政策及其附錄(附錄適用於身處於中國內地的客戶)詳載於 www.zurich.com.hk/pics 或可透過掃描QR碼細閱。閣下亦可致電+852 3405 7150 與我們的客戶服務部聯絡或向保險中介人查詢。



Consent for marketing purposes - Voluntary:

就市場推廣用途之同意 – 自願性：

Certain personal information of policyholders and insured persons collected or held by the Company (which also includes data collected or generated in the ordinary course of the Company's business and the continuation of relationship with the customer), in particular, names, contact information, age, gender, identity document reference, marital status, financial background, demographic data, transaction pattern and behavior, policy information, claim information and medical history may be used by the Company, **only upon having such policyholders' or insured persons' consent**, for providing marketing materials and conducting direct marketing activities in relation to insurance and/or financial products and services of the ("Zurich Insurance Group") and/or other financial services providers, and/or other related services of business partners, with whom the Company maintains business referral or other arrangements (such as reward, loyalty, co-branding or privileges programs and related services and products, services and products offered by the Company's business or co-branding partners, donations or contributions for charitable and/or non-profit making purposes). For the avoidance of doubt, the latest instruction (for example, consent or request for opt-out) received from a customer shall override any previous instruction given to the Company in this regard in relation to all personal information of the customer collected or held by the Company from time to time.

由本公司收集或持有的保單持有人及受保人的某些個人資料(其中亦包括在本公司日常業務過程中以及就持續與客戶的關係收集或產生的資料)，特別是姓名、聯絡資料、年齡、性別、身分證明文件資料、婚姻狀況、經濟背景、人口統計數據、交易模式和行為、保單資料、索償資料及醫療紀錄等，**於獲該保單持有人或受保人同意後**，均可供本公司使用作為蘇黎世保險集團及／或與本公司維持業務引薦關係或其他安排之其他金融服務供應商的保險及／或金融產品及服務，及／或其他商業合作夥伴之相關服務，提供市場推廣資料及進行直接市場推廣活動。(例如獎賞、忠誠獎勵、合作品牌或優惠計劃以及相關服務和產品，由本公司商業合作夥伴或合作品牌夥伴提供的服務和產品，出於慈善及／或非牟利目的的捐贈或捐款)。為免生疑問，就本公司不時收集或持有的所有客戶個人資料，本公司將會以從客戶收到的最新指示(例如同意或提出反對要求)。

The Company may provide (and may receive money or property in return for providing) certain personal information, in particular, name, contact information, age, gender and policy information of a policyholder and an insured person, **only upon having such policyholder's and insured person's written consent**, to be used by the following parties, within or outside of Hong Kong, for their own and/or the Company's **marketing purposes** set out above:

於獲保單持有人及受保人書面同意後，本公司方可就以下人士本身及／或就本公司的**市場推廣用途**，向以下於香港境內或境外的人士提供其某些個人資料(並可能收到金錢或其他財產作為回報)，特別是姓名、聯絡資料、年齡、性別、保單持有人及受保人的保單資料等，以供其使用：

- (1) companies within the Zurich Insurance Group;
蘇黎世保險集團成員公司；
- (2) other banking/financial institutions, commercial or charitable organizations with whom the Company maintains business referral or other arrangements;
與本公司維持業務引薦關係或其他安排的其他銀行／金融機構、商業或慈善組織；
- (3) third party reward, loyalty, co-branding or privileges program providers;
第三方獎賞、忠誠獎勵、合作品牌或優惠計劃提供者；
- (4) third party marketing service providers and insurance intermediaries.
第三方市場推廣相關服務供應商及保險中介人。

I/We understand that I/we can withdraw any consent provided for marketing purposes anytime by notice to the Company.

本人／我們明白可隨時通知 貴公司以撤回任何就市場推廣用途所給予之同意。

☐ I/We agree to the use or transfer of my/our personal data for marketing purposes as set out above.

本人／我們同意 貴公司使用或向第三方提供本人／我們的個人資料作上列市場推廣用途。

I/We understand that the Company will only communicate with me/us using the contact details that I/we have supplied. Where I/we have provided more than one form of contact details, the most appropriate method of communication will be used depending on the urgency and sensitivity of the information.

本人／我們明白 貴公司只會以本人／我們提供的聯絡資料與本人／我們通訊。若本人／我們提供多過一種聯絡資料，貴公司會因應資訊的緊急及敏感程度，而採用最合適的聯絡方法。

I/We note that my/our telephone calls may be recorded or monitored in order to offer additional security, resolve complaints and for training, administrative and quality purposes.

本人／我們知道 貴公司或會將本人／我們的電話對話作錄音或監察，以作強化保安、處理投訴、訓練、行政和提升服務質素之用。

Policyholder’s declaration and data protection (continued) 保單持有人的聲明及資料保護 (續)

I/We understand that my/our personal information may be passed outside Hong Kong to countries that do not have equivalent levels of data protection; however the Company would be responsible for ensuring that equivalent levels of protection are maintained.
本人／我們明白本人／我們的個人資料可能被傳送至香港以外的國家，而這些國家並沒有同等程度的個人資料保障，但 貴公司有責任確保本人／我們的個人資料受到同等程度的保障。

I/We confirm that I/we agree to my/our personal data being collected, used and transferred as set out above in the Personal Information Collection Statement and Declaration.
本人／我們謹此同意可收集、使用及傳送本人／我們的個人資料作上述收集個人資料聲明之用途。

I/We further confirm that I/we agree with the Company’s use and transfer of my/our sensitive personal data as set out in the “Addendum to Personal Information Collection Statement” (www.zurich.com.hk/en/services/privacy).
本人／我們進一步同意 貴公司按照「收集個人資料聲明之附錄」(www.zurich.com.hk/zh-hk/services/privacy) 中列明的方式使用及傳送本人／我們的敏感個人資料。

Signature of policyholder 1 第一保單持有人簽署				Signature of policyholder 2 第二保單持有人簽署			
Full name 姓名 (請以正楷填寫)				Full name 姓名 (請以正楷填寫)			
Date signed 簽署日期				Date signed 簽署日期			

Section D 部：Licensed insurance intermediary’s details and declaration
持牌保險中介人資料及聲明

To be completed by your licensed insurance intermediary. 此部分必須由 閣下的持牌保險中介人填寫。

Family name 姓				Given name 名			
Job title 職銜							
Brokerage name 中介人公司名稱							
Suitable certifier no. (if applicable) 有效核證人號碼 (如適用)							
Regulatory body/Individual membership no. 監管機構／個別成員編號							

Declaration 聲明

I declare that all the answers provided to me by the proposer/life to be assured are declared in this form. I have not withheld any other information which may influence the acceptance of this proposal by the Company.
本人聲明，投保人／受保人向本人提供的所有答案均已在本表格中披露。本人並無隱瞞可能影響 貴公司接納本投保申請的任何其他資料。

Signature 簽署				Date signed 簽署日期			
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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 authorized by the Isle of Man Financial Services Authority.

Registered in the Isle of Man number 20126C.

Registered office: Zurich House, Isle of Man Business Park, Douglas, Isle of Man, IM2 2QZ, British Isles
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www.zurich.com.hk

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。

註冊辦事處：Zurich House, Isle of Man Business Park, Douglas, Isle of Man, IM2 2QZ, British Isles
電話：+44 1624 662266 傳真：+44 1624 662038

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