

索償資料 (由受保人/保單持有人/索償人填寫)

PARTICULARS OF CLAIM (To be completed by Insured / Policyholder / Claimant)

A. 一般資料 General Information

1 請選擇相關指定事件 Please select the Designated Event

- 受保人小學、中學、大學或高等教育院校畢業 (就大學或高等教育院校而言, 須為學士或學士以上學位)
The Insured has graduated from a primary school, secondary school, university or higher education institution (Bachelor's degree or above for graduating from university or higher education institution)
- 受保人結婚
The Insured has got married
- 受保人的親生子女或親生孫子女出生
Birth of natural child or natural grandchild of the Insured
- 受保人購買住宅物業
The Insured has purchased a residential property
- 受保人 65 歲生日
65th Birthday of the Insured

2 職業(必須填寫) Occupation (Compulsory)

行業(必須填寫) Business (Compulsory)

B. 賠款方式 PAYMENT METHODS

請就每宗理賠申請選擇一項理賠支付方式。如未有註明指示, 理賠將以港元劃線支票進行支付, 並經由保險中介人轉遞。Please select one settlement option for each claim submission. For any unspecified instruction, the payment will be issued by crossed cheque in HKD and delivered via Insurance Intermediary.

賠款幣種選擇 PAYMENT CURRENCY OPTION (如無註明, 賠款將以港幣發放。 If not specified, payment will be issued in HKD.)

- 保單貨幣 Policy Currency 港幣 Hong Kong Dollar

1 自動入賬 DIRECT CREDIT

銀行名稱 Name of bank

銀行編號 Bank Code

分行編號 Branch Code

戶口號碼 Account No.

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賬戶持有人姓名(中文) (必須為保單持有人)

Name of bank account holder (Chinese) (Policyholder Only)

賬戶持有人姓名(英文) (必須為保單持有人)

Name of bank account holder (English) (Policyholder Only)

- 轉數快 FPS
- 轉賬至本地銀行之賬戶 TRANSFER TO ACCOUNT IN LOCAL BANK
- 轉賬至本公司已登記之預設收款賬戶 TRANSFER TO DEFAULT PAYMENT ACCOUNT REGISTERED IN OUR COMPANY

備註:

- 銀行賬戶持有人必須為保單持有人。Bank Account Holder must be the Policyholder.
- 倘未有足夠資料顯示銀行賬戶持有人為保單持有人或因故未能成功自動入賬, 有關款項將以劃線支票形式發出。If there is insufficient information to identify the ownership of bank account belonging to the Policyholder or direct credit has failed for any reason, the payment will be issued in the form of a crossed cheque.
- 如選擇以「轉數快」方式領款 If you choose to receive the payment by "FPS",
 - 「轉數快」只適用於實付貨幣為港元或人民幣的申請, 每筆交易金額上限為港元或人民幣 1,000,000。"FPS" is only applicable for payment in HKD or CNY. The maximum amount of each transaction is HKD/CNY 1,000,000.
 - 請注意人民幣幣種僅適用於人民幣保單。Please note that CNY currency is only applicable for CNY policy.
 - 只適用於本地開立, 並已成功辦理登記「轉數快」綁定服務的銀行賬戶。申請詳情請向有關銀行查詢。Only applicable to the local bank account which registration is completed successfully for "FPS" binding service. Please enquire to the relevant bank for application details.
- 如選擇以「轉賬至本地銀行之賬戶」方式領款 If you choose to receive the payment by "Transfer to account in local bank",
 - 需提供賬戶證明文件, 如印有賬戶持有人姓名/名稱及賬戶號碼的銀行卡/月結單/存摺。Proof of bank account document(s), such as bank card/monthly statement/ passbook with account holder name and account no. is required.
 - 如賠款為港元或人民幣以外幣種, 銀行所收取的代付手續費及匯率損失將由領款人自行承擔 (如適用)。If the payment is not in HKD or CNY, bank charge and losses caused by exchange rate associated with the transaction would be borne by the recipient (if applicable).
 - 如轉賬不成功, 相關手續費用及匯率損益將於給付款項中自動扣除 (如適用)。Administration fees and losses caused by exchange rate would be deducted from the payment amount in case of remittance failure (if applicable).

B. 賠款方式 (續) PAYMENT METHODS (Continued)**1 自動入賬 (續) DIRECT CREDIT (Continued)** **電匯 TELEGRAPHIC TRANSFER**

可於 <https://www.chinalife.com.hk/zh-hk/customer-service/forms-download/individual-claim> 下載「理賠匯款服務申請表」。

Please download "Claim Remittance Service Application Form" from <https://www.chinalife.com.hk/zh-hk/customer-service/forms-download/individual-claim>

 大灣區廣發銀行跨境匯款服務 GREATER BAY AREA CGB CROSS BORDER REMITTANCE SERVICE

可於 <https://www.chinalife.com.hk/zh-hk/customer-service/forms-download/individual-claim> 下載「理賠跨境匯款服務申請表 (只適用於持有大灣區廣發銀行賬戶客戶)」 Please download "Claim Cross Border Remittance Service Application Form (Only Applicable For Greater Bay Area CGB's Account Holder)" from <https://www.chinalife.com.hk/zh-hk/customer-service/forms-download/individual-claim>

2 本地銀行劃線支票 HK LOCAL CROSSED CHEQUE **親自到灣仔客戶服務中心提取 Collect cheque at Wan Chai Customer Service Centre in person**

(如保單是透過網上銷售方式購買，而保單持有人尚未完成身份認證，則賠款須以支票形式支付，並請保單持有人帶同身份證明文件親臨本公司客戶服務中心收取支票。 If the Policyholder purchased the policy online, and has not completed the identity verification, the claim payment will be made by cheque. The Policyholder should collect the cheque at our Customer Service Centre by presenting the identity document.)

 授權第三者(代領人) 到灣仔客戶服務中心領取 Pick up cheque at Wan Chai Customer Service Centre by authorized person

代領人姓名 代領人聯絡電話 代領人身份證明文件號碼

Name of authorized person

Contact no. of authorized person

I.D. no. of authorized person

 郵寄至保單登記的通訊地址 Mail to correspondence address registered in our Company **經保險中介人轉遞 Deliver via Insurance Intermediary** **親自到銀行分行領取 (請指定銀行分行) Collect cheque at branch in person (Please state the branch)**

銀行分行 Branch _____

3 其他 OTHERS **資金調配至保單 FUND TRANSFER TO POLICY**

僅適用於同一領款人名下生效之保單，請指定保單號碼。抵付保費時已包括保費徵費。 Only applicable to inforce policy under the same payee, please specify the policy no.. The Premium Levy has been included into the Premium Payment.

 非劃線支票 / 匯票 UNCROSSED CHEQUE / DEMAND DRAFT

可於 <https://www.chinalife.com.hk/zh-hk/customer-service/forms-download/individual-claim> 下載「特別領取方式申請表」。 Please download "Special Payment Arrangement Request Form" from <https://www.chinalife.com.hk/zh-hk/customer-service/forms-download/individual-claim>

C. 索償所需文件清單 CLAIM DOCUMENT CHECKLIST **基本文件 Basic Documents**

索償所需文件(文件的核實正本可於本公司的客戶服務中心辦理) Claim Document (Documents can be certified at our Company's Customer Service Centres)	分享喜悅獎勵 Share happiness reward
<input type="checkbox"/> 由閣下填妥並簽署之本申請表 This form completed and signed by your good self	✓
<input type="checkbox"/> (i) 小學畢業證書 (ii) 中學畢業證書或 (iii) 大學或高等教育院校頒發的學士或學士以上學位的畢業證書之核實正本 The certified true copy of graduation certificates for (i) primary school; (ii) secondary school; (iii) a Bachelor's degree or above awarded by such university or higher education institution	✓
<input type="checkbox"/> 有顯示結婚日期的結婚證書之核實正本 The certified true copy of marriage certificate showing the date of marriage	✓
<input type="checkbox"/> 受保人的親生子女所發出的出生證明書之核實正本 (若受保人的子女出生) 或對受保人的親生子女及其親生的子女所發出的兩代出生證明書之核實正本 (若受保人的孫子女出生) The certified true copy of birth certificate of the natural child of the Insured (if the child was born) or the certified true copy of birth certificates of the natural child of the Insured and the natural grandchild of the Insured for both generations (if the grandchild was born)	✓
<input type="checkbox"/> 載有受保人以個人或聯名身份作為買方所簽署的住宅物業轉讓契之核實正本 The certified true copy of deed of assignment of a residential property signed by the Insured as a purchaser by way of sole or joint ownership	✓
<input type="checkbox"/> 受保人身份證明文件之核實正本 The certified true copy of identity document of the Insured	✓

D. 個人資料收集聲明 PERSONAL INFORMATION COLLECTION STATEMENT

本人/我們確認已閱讀及明白「中國人壽保險(海外)股份有限公司」的收集個人資料聲明。有關最新版本的收集個人資料聲明，可於 <https://www.chinalife.com.hk/zh-hk/privacy-policy/personal-information-collection-statement-clio> 下載或向中國人壽保險(海外)股份有限公司索取。I/We confirm that I/we have read and understood the Personal Information Collection Statement ("PICS") of China Life Insurance (Overseas) Company Limited. For the latest version of the PICS, it can be downloaded from <https://www.chinalife.com.hk/zh-hk/privacy-policy/personal-information-collection-statement-clio> or is made available upon request.

E. 收取個人壽險保費徵費 COLLECTION OF PREMIUM LEVY ON INDIVIDUAL LIFE INSURANCE POLICIES

本人/我們謹已收悉：貴公司就保險業監管局要求並授權向每位保單持有人所持有的有效保單徵收「保費徵費」(下稱「徵費」)，及將收取的徵費將會全數轉交予該局。保險業監管局亦可以根據相關條例，將有關的欠付款作為民事債項及向相關的保單持有人追討欠款並有機會徵收罰款。有關收取徵費的詳情，請瀏覽中國人壽(海外)股份有限公司的網頁 <https://www.chinalife.com.hk/zh-hk/customer-service/useful-information/premium-levy>。I/We hereby notified that: China Life Insurance (Overseas) Company Limited, as an authorized insurer, is statutorily required to collect Premium Levy ("Levy") from policyholder on behalf of the Insurance Authority ("IA") and report to IA. IA may take legal proceedings against policyholder in respect of any outstanding Levy as civil debt and may impose pecuniary penalty. For details of the collection of Levy, please refer to the website at <https://www.chinalife.com.hk/customer-service/useful-information/premium-levy>.

F. 聲明及授權 DECLARATION AND AUTHORIZATION**授權 Authorization**

本人/我們，受保人/保單持有人/索償人，代表本人/我們及尚未成年之受保人(如有)謹此授權 (1) 任何僱主、註冊西醫、醫院、診所、保險公司、銀行、政府機構、政府部門，或其他機構、組織或人士，凡知道或具有任何有關本人/我們/尚未成年之受保人之醫療病歷、紀錄或資料者，均可將該等資料提供、發放及轉交給中國人壽保險(海外)股份有限公司(以下簡稱「貴公司」)；(2) 貴公司或任何其指定之醫療/輔助醫療檢查員或化驗所，可就本索償申請替本人/我們/尚未成年之受保人進行所需之醫療評估及測試，作為審核本人/我們/尚未成年之受保人之健康狀況。此授權對本人/我們之繼承人及授讓人具有約束力。此授權書的影印本與正本均有同等效力。I/We, the Insured/Policyholder/Claimant, represent me/ us/ the under aged Insured (if any) HEREBY AUTHORIZE (1) any employer, registered medical practitioner, hospital, clinic, insurance company, bank, government institution, government department, or other organization, institution or person, that is aware of or has any medical history, records or information of me/us/the under aged Insured to disclose, release and transfer such information to China Life Insurance (Overseas) Co. Ltd ("the Company"); (2) the Company or any of its appointed medical / para-medical examiners or laboratories to perform the necessary medical assessment and tests to evaluate the health status of myself/ ourselves/ the under aged Insured in relation to this claim. This authorization shall bind the successors and assignees of me/us. A photocopy of this authorization shall be as valid as the original.

聲明 Declaration

本人/我們，受保人/保單持有人/索償人，謹此聲明及同意(1)上述一切陳述及問題的所有答案，不論是否本人/我們親手所寫，就本人/我們所知所信，均為事實之全部並確實無訛；本人/我們明白倘未知任何一項是否重要，本人/我們均須將其事實在本申請表上說明；(2)本人/我們對任何人所作出之任何聲明，除在本申請表上填寫或印出及經貴公司發表和批准外，貴公司不須受其約束。若相關人士不能提供任何本申請表所需的資料，貴公司可能因此不能審核及處理本索償申請；(3)本人/吾等明白並同意貴公司有權撤回或要求本人/吾等退回因提供不正確資料而導致的錯誤賠償；(4)本人/吾等同意賠償任何損失，索償及與國籍、居住及/或稅務狀況有關資料之虛報、誤導或不完整所導致的行動。

I/We, the Insured/Policyholder/Claimant HEREBY DECLARE and AGREE that (1) all the foregoing statements and answers to all questions whether or not written by my/our own hand are to the best of my/our knowledge and belief complete and true; I/We also understand that in the event of doubt as to whether a fact is material, it should be disclosed here; (2) The Company is not bound by any statement which I/ we may have made to any person unless it is written or printed here and is presented and approved by the Company. If any relevant persons fail to provide any information requested in this claim form, it may result in the Company's inability to process and deal with this claim; (3) I/We understand and agree that the Company has the right to reverse/claw back any incorrect payment caused by incorrect information provided by me/us; (4) I/We agree to indemnify the Company against any loss, claim and action in connection with any false, misleading or incomplete information of my/our nationality, residence and/or tax status.

G. 簽署(請勿在空白表格上簽署) SIGNATURE (Please DO NOT sign on BLANK form)

	受保人 (年齡 18 歲或以上) Insured (whose age is 18 or above)			保單持有人 / 索償人* Policyholder / Claimant*			見證人 Witness		
簽署 Signature									
姓名 Name									
身份證/護照號碼 I.D. Card / Passport No.									
日期 Date	年 Year	月 Month	日 Day	年 Year	月 Month	日 Day	年 Year	月 Month	日 Day
*索償人與受保人/保單持有人關係 *Relationship with Insured/Policyholder									