

付款聲明書

PSF-PDF

Payment Declaration Form

持牌保險中介人資料 Licensed Insurance Intermediary's Information		
持牌保險中介人編號 Licensed Insurance Intermediary Code	持牌保險中介人姓名 (姓氏先行) Licensed Insurance Intermediary's Name (Surname First)	持牌保險中介人聯絡電話號碼 Licensed Insurance Intermediary's Contact Phone No.

保單資料 Policy Information		
保單號碼 Policy No.	投保人 / 保單持有人姓名 (姓氏先行) Name of Proposer / Policy Owner (Surname First)	投保人 / 保單持有人聯絡電話號碼 Proposer / Policy Owner's Contact Phone No.

注意事項 Notes
<p>1. 中國太平洋人壽保險(香港)有限公司(以下簡稱「太保壽險香港」、「本公司」或「我們」)只接受投保人/保單持有人或合資格的第三者付款人(即投保人/保單持有人之配偶、子女或父母)繳付保費。</p> <p>2. 此聲明書適用於由投保人/保單持有人以現金存款或合資格的第三者付款人(包括聯名賬戶持有人)之繳款。</p> <p>3. 若付款方式未能顯示付款人之完整姓名(例如:不記名支票、銀行本票或本地匯票(統稱為「票據」)、電子支付或轉賬),請同時提供載有付款人完整姓名的賬戶證明或購票證明。</p> <p>4. 如合資格的第三者繳付港幣 120,000 元、15,000 美元或人民幣 96,000 元以上,請遞交其身份證明文件核實副本;</p> <p>5. 如繳付金額為港幣 500,000 元、62,500 美元或人民幣 400,000 或以上,請遞交合資格的第三者付款人與投保人/保單持有人之關係證明文件核實副本。</p> <p>6. 如繳付金額為港幣 1,000,000 元、125,000 美元或人民幣 800,000 或以上,請遞交付款人之財富來源證明。</p> <p>7. 請在適當方格內加上 ✓ 號,並用正楷填寫。</p> <p>8. 投保人/保單持有人之簽署必須與本公司之存檔相符。</p> <p>9. 投保人/保單持有人及合資格的第三者付款人請在此表格內任何更改或修改的地方簽署作實。切勿在空白表格或尚未填妥的表格上簽署。</p> <p>10. 請於簽署日起計 30 天內遞交至本公司辦理手續。</p> <p>11. 請細閱本表格內之「個人資料收集聲明」。</p> <p>12. 我們或會索取額外資料或證明以處理所收到的款項及相關指示。任何繳款須經我們接納後,方可作實。未能提供所要求的額外資料/文件可能會導致付款被拒收。</p> <p>13. 如需協助,歡迎聯絡您的持牌保險中介人或我們的客戶體驗大使。我們非常樂意為您服務。</p> <ul style="list-style-type: none">• (香港) 客戶服務熱線:(852) 3169 5500• (內地) 客戶服務熱線:95500• 電郵:wecare@cpiclife.com.hk
<p>1. China Pacific Life Insurance (H.K.) Company Limited (hereafter called "CPIC Life (HK)", "the Company" or "We") only accepts premium payment(s) by the Proposer / Policy Owner or eligible third party payor (i.e. spouse, children or parents of Proposer / Policy Owner).</p> <p>2. This form is applicable for cash deposit by Proposer / Policy Owner, any payment by eligible third party payor (including joint account holder).</p> <p>3. If the payment method (e.g. anonymous cheque, cashier's order or local bank draft (collectively referred as "Cheques"), electronic payment or transfer) does not indicate the full name of the payor, please also provide bank account proof or purchasing proof bearing the full name of the payor.</p> <p>4. If the payment amount paid by eligible third party payor is HKD120,000, USD15,000 or RMB96,000 or above, please submit a certified true copy of his / her identity document.</p> <p>5. If the amount of payment is HKD500,000, USD62,500 or RMB400,000 or above, please submit a certified true copy of relationship proof between the eligible third party payor and the Proposer / Policy Owner.</p> <p>6. If the amount of payment is HKD1,000,000, USD125,000 or RMB800,000 or above, please submit proof of source of wealth of the payor.</p> <p>7. Please ✓ the appropriate box(es) and complete in BLOCK LETTERS.</p> <p>8. The signature of the Proposer / Policy Owner must be consistent with that in the Company's record.</p> <p>9. The Proposer / Policy Owner and the eligible third party payor please endorse any changes or amendments in this form in full signature. Please do not sign on blank or incomplete form.</p> <p>10. This form must be received by the Company within 30 days from the date of its signing.</p> <p>11. Please read carefully the "Personal Information Collection Statement" appended in this form.</p> <p>12. We may request for additional document or proof for our processing of the received payment and instruction. All payment records will be updated once the payment is accepted by the Company. Failure to provide additional information/documents requested may cause the payments being rejected.</p> <p>13. For any assistance, please feel free to contact your Licensed Insurance Intermediary or our Customer Experience Ambassador. We are always delighted to serve you.</p> <ul style="list-style-type: none">• Hong Kong Customer Service Hotline : (852) 3169 5500• Mainland Customer Service Hotline : 95500• Email : wecare@cpiclife.com.hk

第一部份 付款人資料		Section I Payor Information	
英文姓名 (以身份證明文件為準) Name in English (As shown on Identity Document)	姓氏 Surname		中文姓名 (以身份證明文件為準) Name in Chinese (As shown on Identity Document)
	名字 Given Names		
身份證明文件類型 Type of the Identity Document	<input type="checkbox"/> 身份證 ID card <input type="checkbox"/> 護照 Passport <input type="checkbox"/> 其他(請註明) Others (Please specify) _____		國籍 Nationality
			身份證明文件號碼 No. of the Identity Document
出生日期 Date of Birth	_____ / _____ / _____ 日 DD / 月 MM / 年 YYYY		與投保人 / 保單持有人之關係 Relationship with Proposer / Policy Owner
性別 Sex	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female		
聯絡電話 Contact no.			
通訊地址 Correspondence Address	_____ _____ <input type="checkbox"/> 香港 Hong Kong <input type="checkbox"/> 其他城市 Other City: _____ 國家 Country: _____		
住宅地址 Residential Address (若與通訊地址不同, 請填寫此欄) (Complete when different from Correspondence Address)	_____ _____ <input type="checkbox"/> 香港 Hong Kong <input type="checkbox"/> 其他城市 Other City: _____ 國家 Country: _____		

第二部份 付款資料		Section II Payment Information	
繳款方法 Payment Method <input type="checkbox"/> 存款 / 戶口轉賬至本公司之銀行戶口 Deposit into the Bank account of the Company <input type="checkbox"/> 電匯 / 本地跨行轉賬 Telegraphic Transfer / CHATS <input type="checkbox"/> 自動轉賬 Autopay		繳款用途 Purpose of Payment <input type="checkbox"/> 首期保費 Initial premium <input type="checkbox"/> 續期保費 Renewal premium <input type="checkbox"/> 償還貸款 Loan repayment <input type="checkbox"/> 保單更改 Policy change <input type="checkbox"/> 其他 (請註明) Others (Please specify) _____	
*繳款日期 Payment Date: _____ *繳款金額 Payment amount <input type="checkbox"/> 港幣 HKD _____ <input type="checkbox"/> 美元 USD _____ <input type="checkbox"/> 人民幣 RMB _____ *不適用於自動轉賬繳費 *Not applicable for payment by autopay		付款人之財富來源 Source of Wealth of the Payor <input type="checkbox"/> 薪金 Salary <input type="checkbox"/> 儲蓄 Savings <input type="checkbox"/> 遺產 Inheritance <input type="checkbox"/> 投資收益 Investment Earnings <input type="checkbox"/> 租金收入 Rent Income <input type="checkbox"/> 生意收入 Business Income <input type="checkbox"/> 其他 (請註明) Others (Please specify) _____	
		以現金存款或由第三者付款之原因 Reason(s) for payment in cash or by third party 請詳述 Please state : _____ _____ _____ _____	

第三部份 聲明及授權書 Section III Declaration and Authorization

1. 本人 / 我們明白及同意此繳費將不會被接納直至所有有關文件及資料交妥及經太保壽險香港批核後方可作實。
 2. 本人 / 我們聲明及同意所提供的一切資料，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。
 3. 如本人 / 我們不能提供任何所須的資料或未能符合太保壽險香港的有關規定，本人 / 我們明白太保壽險香港可能因此不能接受此繳費。
 4. 本人 / 我們謹此確認已閱讀及明白以上的所有條款及條件及所有注意事項，並同意受該等條款及條件約束。本人 / 我們謹此同意作出以上指示及聲明。
 5. 本人 / 我們確認本人 / 我們已閱讀並明白本表格附件之「個人資料收集聲明」。本人 / 我們特此確認並同意公司根據「個人資料收集聲明」使用和移轉本人 / 我們的個人資料。本人 / 我們已取得在此申請提供第三方資料（如有）所需的同意。本人 / 我們確認並同意為「個人資料收集聲明」中所述之目的將本人 / 我們的個人資料移轉至香港境外給本聲明所述的承轉人的類別。
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1. I / We understand and agree that the payment shall not be accepted until any required documents and information are submitted in full and duly approved by CPIC Life (HK).
 2. I / We hereby declare and agree that all the provided information whether or not written by my / our own hand are to the best of my knowledge and belief complete and true.
 3. If I / we fail to provide any required information or fulfill CPIC Life (HK)'s requirement(s), I / we understand that it may result in CPIC Life (HK)'s inability to accept the payment.
 4. I / We hereby confirm that I / we have read and understand all the above notes, terms and conditions, and agree to be bound by them. I / We hereby agree to make the above instructions and declarations.
 5. I / We acknowledge and confirm that I / we have read and understand the Personal Information Collection Statement attached to this form. I / We hereby give my / our acknowledgement and agree to the use and transfer of my / our personal data by the Company in accordance with the Personal Information Collection Statement. I / We have obtained the consent to provide the third party information (if any) in this application. I / We acknowledge and consent to the transfer of my / our personal data outside of Hong Kong for the purposes and to the types of transferee as set out in the Personal Information Collection Statement.

投保人 / 保單持有人簽署
Signature of Proposer / Policy Owner

簽署日期（日 / 月 / 年）
Sign Date (DD/MM/YYYY)

合資格的第三者付款人簽署（非投保人 / 保單持有人）
Signature of Eligible Third Party Payor (if not Proposer / Policy Owner)

簽署日期（日 / 月 / 年）
Sign Date (DD / MM / YYYY)

請參閱下頁的「個人資料收集聲明」。 Please read the Personal Information Collection Statement on next page.

個人資料收集聲明

Personal Information Collection Statement

太保壽險香港尊重和保障您的私隱及承諾遵守〔個人資料(私隱)條例〕(香港特別行政區(「香港」)法例第 486 章)(「私隱條例」)的要求。本聲明適用於太保壽險香港所提供的產品和服務，並闡述本公司收集客戶個人資料的原因、資料的擬定用途，可能獲提供個人資料的人士，以及有關查閱、檢視及修改個人資料的方法。本聲明中的「客戶」是指資料當事人(定義見私隱條例)，包括現有和未來的保單持有人、受保人、受益人、以及根據保單指定或有權收取款項和 / 或其他利益的其他人。

1. 太保壽險香港所收集及 / 或持有的個人資料

於本聲明內，「個人資料」的含義與私隱條例中的定義相同，其意包括(a)直接或間接與一名在世的個人有關的；(b)從該資料直接或間接地確定有關的個人的身分是切實可行的；及(c)該資料的存在形式令予以查閱及處理均是切實可行的數據。本公司所收集及 / 或持有的個人資料包括但不限於您的姓名、身份證號碼、聯絡資料、家族歷史、保單資料、學歷、就業資料、財務資料、健康和醫療資料。

太保壽險香港將保留您的個人資料直至達到收集個人資料的目的及符合法例要求。如果太保壽險香港不再需要您的個人資料以作任何用途，本公司將會採取合理的步驟，安全地刪除或銷毀您的個人資料。

2. 未能提供個人資料的影響

提供您的個人資料純屬自願。如果您不向我們提供所需的個人資料，我們可能無法向您提供所需的產品及服務。

3. 太保壽險香港收集個人資料的目的

太保壽險香港所持有您的個人資料可能會用於以下目的：

- a) 處理保險產品或服務的申請及核實相關的資格；
- b) 設計全新或加強現時太保壽險香港所提供的保險產品、服務及相關產品；
- c) 管理已簽發的保單；
- d) 處理付款指示；
- e) 處理任何保險索償；
- f) 進行統計及精算研究；
- g) 資料核對，或開展核對程序(定義見私隱條例，但廣泛而言包括對資料當事人兩套或更多套的資料進行比對，以採取不利於資料當事人的行動，例如拒絕申請)；內部業務及行政之用；
- h) 釐定本公司欠付您或您拖欠本公司的任何款項的金額，及執行您之責任，包括向您或任何已為您的債務向本公司提供任何擔保或承諾的人士追收尚欠金額(如有)；
- i) 就您在本公司持有的任何帳戶或本聲明未來的變更發出行政性通訊；
- j) 直接推廣；
- k) 進行保單檢閱及需要分析；
- l) 滿足任何適用法律、規則、實務守則或指引規定的要求，或協助在香港或香港以外的監管機構執法及進行調查；
- m) 在收集時列明的其他用途；
- n) 與上述任何一項直接有關的其他用途。

4. 轉交

太保壽險香港收集的個人資料將保密處理，但可能會轉交給及向以下不論是位於香港境內或境外的任何一方披露，以作上述第 a) 至 n) 項之用途。

- i. 中國太平洋保險(集團)股份有限公司(「太保集團」)及集團內的其他公司；
- ii. 任何進行保險及 / 或再保險有關業務的公司；
- iii. 任何與太保壽險香港有合約的持牌保險中介人；
- iv. 任何保險索償調查人員；
- v. 任何夥伴金融機構；
- vi. 就業務經營關係向太保壽險香港提供行政、技術、數據處理、電訊、電腦、支付、債務追收、電話中心服務、直接推廣服務或其他服務的任何代理、承包商或第三方管理人員；
- vii. 任何不時存在的保險業協會及聯會；
- viii. 任何提供保險及 / 或再保險相關業務的其他服務供應商；
- ix. 任何政府部門及司法機構或監管機構；
- x. 在收集個人資料時已通知您的任何其他團體。

5. 查閱及修改

根據私隱條例，您有權要求查閱及 / 或修改由本公司持有的您的個人資料。如果您想要查閱及 / 或修改由本公司持有您的個人資料，請向本公司的資料保護主任作出書面要求，地址是香港銅鑼灣希慎道 33 號利園一期 18 樓 1802 室。

6. 直接推廣

太保壽險香港希望就產品優惠及宣傳資料與您保持聯繫，未經您的同意，太保壽險香港不會使用或向其它機構提供閣下之個人資料作直接推廣用途。

太保壽險香港會不時使用和 / 或提供給 (i) 太保集團；(ii) 太保集團的成員公司；和 / 或 (iii) 第三方服務提供商(無論是否以獲取利益為目的) 您的姓名、住址、聯絡地址、電郵及電話號碼(「該資料」)作直接推廣以下之產品和服務：

- 保險、年金、財富管理、基金投資服務、退休計劃和其他金融相關的產品和服務；
- 與健康、保健和醫療、退休養老、體育活動和會員資格、健身或類似休閒活動、旅行和交通、社交網絡、媒體和醫療保健服務相關的產品和服務；和
- 獎勵、增加現有客戶忠誠度推廣或特權計劃的相關產品和服務。

請您向太保壽險香港的資料保護主任作出書面要求，查閱或取消使用及提供該資料作直接推廣用途，地址是香港銅鑼灣希慎道 33 號利園一期 18 樓 1802 室。

CPIC Life (HK) respects and protects your privacy and pledges to comply with the requirements of the Personal Data (Privacy) Ordinance (Cap. 486 of the laws of Hong Kong Special Administrative Region ("Hong Kong")) (the "Ordinance"). This statement applies to all products and services provided by CPIC Life (HK) and sets out why the Company collects the personal data about the customer(s), how it is intended to be used, to whom it may be provided to and how to access, review and correct the personal data. "Customer(s)" in this statement means data subjects (as defined under the Ordinance) and includes existing and prospective insurance policy owners, insureds, beneficiaries and other persons designated or entitled to receive moneys and/or other benefits under an insurance policy.

1. Personal data collected and / or held by CPIC Life (HK)

In this statement, "personal data" bears the same meaning as defined under the Ordinance. It includes any data (a) relating directly or indirectly to a living individual; (b) from which it is practicable for the identity of the individual to be directly or indirectly ascertained; and (c) in a form in which access to or processing of the data is practicable. The personal data that the Company collects and/or holds includes but is not limited to name, identity card number, contact information, family history, policy details, education details, employment details, financial details, health and medical information.

CPIC Life (HK) will keep the personal data for as long as necessary to achieve the purpose for which it was collected and to comply with prevailing legal requirements. If CPIC Life (HK) no longer needs the personal data for any purposes, the Company will take reasonable steps to securely delete or destroy personal data.

2. Consequence of failing to provide personal data

The provision of the personal data is voluntary. If you do not provide us with the requested personal data, it may inhibit our ability to provide or continue to provide your requested products and service.

3. Purposes of personal data collected by CPIC Life (HK)

Personal data held by CPIC Life (HK) may be used for the following purposes:

- a) processing applications and verifying the eligibility for insurance products or services;
- b) designing new or enhancing existing insurance products, services and related products provided by CPIC Life (HK);
- c) administering the policies issued;
- d) processing payment instructions;
- e) processing any insurance claims;
- f) conducting statistical and actuarial research;
- g) data matching or conducting matching procedure (as defined in the Ordinance, but broadly includes comparison of two or more sets of the data subject's data, for purposes of taking actions adverse to the interests of the data subject, such as declining an application), internal business and administrative purposes;
- h) determining amount of indebtedness owed to or by you, and performing your obligations including the collection of amounts outstanding from you or any person who has provided any security or undertaking for your liabilities owing to the Company (if any);
- i) sending out administrative communications about any accounts you may have with the company or about future changes to this statement;
- j) direct marketing;
- k) performing policy review and needs analysis;
- l) meeting obligations and requirements imposed by any applicable laws, regulations, codes of practice or guidelines or assisting with law enforcement purposes, investigations by regulatory authorities in Hong Kong or elsewhere;
- m) other purposes as notified at the time of collection;
- n) other purposes directly relating to any of the above.

4. Transfer

The personal data collected by CPIC Life (HK) will be kept confidential but may be transferred and disclosed to any of the following parties, whether within or outside Hong Kong, for the purposes as specified in a) to n) above:

- i. China Pacific Insurance (Group) Co., Ltd ("CPIC Group") and any other companies within the Group;
- ii. any companies carrying on insurance and / or reinsurance related business;
- iii. any licensed insurance intermediaries who have an agreement with CPIC Life (HK);
- iv. any insurance claim investigators;
- v. any partnering financial institutions;
- vi. any agents, contractors or third parties administrators who provide administration, technology, data processing, telecommunications, computers, payment, debt collection, call centre services, direct marketing services, or other services to CPIC Life (HK) in connection with the operation of its business;
- vii. any applicable and relevant associations and federations of the insurance industry that exist from time to time;
- viii. any other service providers providing insurance and / or reinsurance related business;
- ix. any governmental and judicial bodies or regulators;
- x. any other parties as notified to you at the time of collection.

5. Access and Correction

In accordance with the provision of the Ordinance, you have the right to request access to and / or correction of your personal data held by CPIC Life (HK). If you want to access and / or correct your personal data held by CPIC Life (HK), please make such a request by writing to our Data Protection Officer at Room 1802, 18/F, Lee Garden One, 33 Hysan Avenue, Causeway Bay, Hong Kong.

6. Direct Marketing

CPIC Life (HK) would like to keep in touch with you regarding product offers and promotional materials. Without your consent, CPIC Life (HK) will not use or provide your personal data to any external parties for any direct marketing purposes.

CPIC Life (HK) will use your name, residential address, contact address, email and phone number ("Information") from time to time and/or provide the Information to (i) CPIC Group; (ii) CPIC Group member companies; and/or (iii) third-party service providers (whether or not in return for gain) for direct marketing of the following:

- insurances, annuities, wealth management, fund investment services, retirement schemes and other financial related products and services;
- products and services in relation to health, wellness and medical, healthy ageing and retirement, sporting activities and membership, fitness or similar leisure activities, travel and transportation, social networking, media, medical care services; and
- reward, customer loyalty or privilege programme and related products and services.

Please notify the Data Protection Officer of CPIC Life (HK) in writing to Room 1802, 18/F, Lee Garden One, 33 Hysan Avenue, Causeway Bay, Hong Kong if you wish to access or withdraw your consent to the use and provision of Information for direct marketing purposes.