

# Appointment of third party as beneficiary/payee 委任第三方為受益人／收款人

**Important – you should take legal advice before signing this form.**  
**重要資料 - 您應在簽署此表格之前尋求法律意見**

For Hong Kong use only  
僅供香港使用

Online submission is now available, you may access online to submit your request directly (<https://portal.fpiinternational.com/fpi-portal-fe/login.html#/>). If you would like to obtain further information, please call our customer hotline on +852 3550 6188 or email customerservicing@fpihk.com and we will be happy to assist.

現在您可透過網上系統提交服務指示，您可經以下網址按指示直接提交所需服務 (<https://portal.fpiinternational.com/fpi-portal-fe/login.html#/>)。如有任何查詢，請致電我們的客戶服務熱線 +852 3550 6188 或電郵至 customerservicing@fpihk.com，我們十分樂意提供協助。

**Please write in English and in BLOCK CAPITALS.**  
請用英文正楷填寫。

**Policy details must be completed.**  
必須填寫保單資料。

## Policy details 保單資料

Policy number(s) 保單號碼		
	<b>First (or only) policyholder</b> 第一(或唯一)保單持有人	<b>Second policyholder</b> 第二保單持有人
Title 稱謂	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> 先生 太太 小姐 女士	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> 先生 太太 小姐 女士
Surname 姓氏		
First name 名字		
Contact telephone number 聯絡電話號碼		

## Appointment of third party as beneficiary/payee 委任第三方為受益人／收款人

**To: Friends Provident International Limited ('Friends Provident International') 致：英國友誠國際有限公司「英國友誠國際」**

Subject to any future revocation or appointment, I/we hereby appoint the following person(s) as beneficiary/payee in the share(s) indicated below.  
(Please note Friends Provident International can only accept whole percentages.)

除將來另行撤銷或委任，本人／我們謹此委任以下人士以下列的所佔權益百分比作受益人／收款人。（請注意，英國友誠國際只接受整數百分比。）

1 Name (as shown on HKID card/passport)  
姓名（如香港身份證／護照所示）

Surname 姓氏		<b>Share of benefit</b> 所佔權益 百分比
First name(s) 名字		
Relationship with the policyholder 與保單持有人之關係		
Relationship with life assured 與受保人之關係		
HKID number/Passport number 香港身份證號碼／護照號碼		
Issuing authority of the identifier 簽發機關		
Email address 電郵地址		
Residential address 住宅地址		

**Appointment of third party as beneficiary/payee (cont.) 委任第三方為受益人／收款人（續）**2 Name (as shown on HKID card/passport)  
姓名（如香港身份證／護照所示）

Surname 姓氏	<input type="text"/>	<b>Share of benefit 所佔權益百分比</b>
First name(s) 名字	<input type="text"/>	
Relationship with the policyholder 與保單持有人之關係	<input type="text"/>	
Relationship with life assured 與受保人之關係	<input type="text"/>	
HKID number/Passport number 香港身份證號碼／護照號碼	<input type="text"/>	
Issuing authority of the identifier 簽發機關	<input type="text"/>	
Email address 電郵地址	<input type="text"/>	
Residential address 住宅地址	<input type="text"/>	

3 Name (as shown on HKID card/passport)  
姓名（如香港身份證／護照所示）

Surname 姓氏	<input type="text"/>	<b>Share of benefit 所佔權益百分比</b>
First name(s) 名字	<input type="text"/>	
Relationship with the policyholder 與保單持有人之關係	<input type="text"/>	
Relationship with life assured 與受保人之關係	<input type="text"/>	
HKID number/Passport number 香港身份證號碼／護照號碼	<input type="text"/>	
Issuing authority of the identifier 簽發機關	<input type="text"/>	
Email address 電郵地址	<input type="text"/>	
Residential address 住宅地址	<input type="text"/>	

**Total: 合計** 

This nomination shall not take effect until this request is received and validated by Friends Provident International during the lifetime of both the life/lives assured and policyholder of the above policy.

本表格需於上述保單之受保人及保單持有人生存期間獲英國友誠國際收訖及核實後，方為有效。

Certified identification and verification of residential address for each beneficiary/payee will be required at the time of the claim.

提出索償之時須提供每名受益人／收款人已核證的身分證明及住址證明。

In the event that at the time of any payment you are unable to contact the beneficiary/payee, you should make enquiries to the following person(s), for the purposes of locating the beneficiary/payee:

如付款時未能聯絡受益人／收款人，您應向下列人士查詢受益人／收款人的所在：

Name of contact 聯絡人姓名	<input type="text"/>
Contact telephone number 聯絡電話號碼	<input type="text"/>
Email address 電郵地址	<input type="text"/>
Address 地址	<input type="text"/>

If no contact name is given, this will not affect the validity of this appointment. Names and details of other contact persons may be given in the 'Additional information' section at the end of this form.

若未有提供聯絡人的姓名，此項委任的效力將仍不受影響。其他聯絡人的姓名及詳細資料可於本表格最後的「附加資料」部分提供。

## Additional information 附加資料

Please use the space below for any additional information we need to be aware of relating to the application.

請在下列空白位置提供任何本公司需留意有關本申請的附加資料。

## Personal Data (Privacy) Ordinance ('PDPO') Personal information collection statement ('PICS') 個人資料(私隱)條例(「個人資料(私隱)條例」)收集個人資料聲明(「聲明書」)

- 1 We take the responsibility of handling your personal data very seriously and we will only ask you for details required to process your requests to us. Please be aware of our privacy policy - please visit [www.fpinternational.com.hk/legal/privacy-and-cookies.jsp](http://www.fpinternational.com.hk/legal/privacy-and-cookies.jsp) to view the full policy or this can be provided on request from our Data Protection Officer.  
我們十分重視處理個人資料的責任，我們只會向您查詢所需的資料以處理有關指示。請瀏覽<https://zh.fpinternational.com.hk/legal/privacy-and-cookies.jsp>以查閱完整的私隱政策；您亦可向本公司的資料保護主任索取此政策。
- 2 Friends Provident International Limited ('FPIL', 'we', 'our' or 'us') is committed to protecting the privacy of its customers. We are bound by the Data Protection Principles set out in the PDPO. We only collect, use or disclose your personal data in accordance with the PDPO and this PICS.  
英國友誠國際有限公司(「英國友誠國際」或「本公司」)致力保護本公司客戶的私隱。本公司須受個人資料(私隱)條例所載的保障個人資料原則約束。本公司只會根據個人資料(私隱)條例及本聲明書而收集、使用或披露您的個人資料。
- 3 It is mandatory for you to provide all of the personal data requested on this form. Failure to provide all the personal data requested on this form may mean that we are unable to process your application.  
您必須提供本表格中要求提供的所有個人資料。如您未能提供本表格要求提供的所有個人資料，則可能導致本公司無法處理您的申請。
- 4 The personal data collected or held by FPIL which includes all the personal data contained in the application form you have completed, or in any document to be provided to FPIL which forms part of the application form, or is otherwise authorised by you to be provided to FPIL, may be used by us for the following purposes (all purposes in this paragraph 4 shall collectively be referred to as the 'purposes'):  
英國友誠國際所收集或持有的個人資料(包括您填妥的申請表格或將向英國友誠國際提供並構成投保申請表格一部分的任何文件所載的所有個人資料，或其他已獲您授權提供予英國友誠國際的所有個人資料)均可由英國友誠國際用作以下用途(在第4段詳列的所有用途統稱為「有關用途」):
  - (i) processing the policy application form including underwriting;  
處理投保申請表格(包括承保)；
  - (ii) administering your policy and providing services in relation to your policy;  
管理您的保單及提供與您保單相關的服務；
  - (iii) investigating and processing claims made under your policy;  
調查及處理您根據保單提出的索償；
  - (iv) conducting research, surveys, customer analysis and data matching for statistical purposes;  
研究、調查、客戶分析、資料核對及統計用途；
  - (v) keeping you informed about other insurance and financial products and services provided by FPIL, and other financial services providers with whom FPIL maintains business referral or partnership arrangements;  
讓您了解由英國友誠國際及與英國友誠國際保持業務轉介關係或業務夥伴安排的其他理財服務供應商所提供的其他保險及理財產品及服務；
  - (vi) facilitating direct debits, requests for payment of premiums, surrender values and death benefit claims;  
接受直接付款，支付保費要求、退保價值及身故利益索償要求；
  - (vii) communicating with you, the insured, and your financial adviser for purposes relating to the policy;  
就與保單相關的事項與您、受保人及您的理財顧問聯繫；

## Personal Data (Privacy) Ordinance ('PDPO') Personal information collection statement ('PICS') (cont.)

### 個人資料(私隱)條例(「個人資料(私隱)條例」)收集個人資料聲明(「聲明書」)(續)

- (viii) communicating with government authorities, any industry association or federation such as the Hong Kong Federation of Insurers or similar organisation ('Federation'), any members of the Federation to allow these parties to carry out their regulatory functions or such other functions that may be assigned to them from time to time and are reasonably required in the interest of the insurance industry or any member(s) of the Federation;  
與政府機構、任何行業協會或聯會(例如香港保險業聯會或類似機構)(「聯會」)、聯會的任何成員聯繫,以便有關方面可履行其監管職責或者可能不時委派予聯會而且對保險業界或聯會任何成員的利益而言是合理需要的其他職責;
- (ix) meeting any disclosure requirements imposed by any local or foreign law or court order binding on FPIL or pursuant to guidelines issued by regulatory or other relevant authorities with which FPIL is expected to comply;  
符合對英國友誠國際具約束力的任何本地或外地法例或法庭命令,或根據監管或其他相關機構所要求英國友誠國際遵守的指引而提出的任何披露要求;
- (x) meeting any tax assessment and tax collection obligations;  
履行任何評稅及徵稅責任;
- (xi) allowing government authorities (such as the Insurance Authority) to carry out their regulatory functions;  
允許政府機構(例如保險業監管局)履行其監管職責;
- (xii) prevention of crime or detection of fraud, debt collection, enabling assets to be rightfully claimed; and  
防止罪行或偵查欺詐及收集債務,使資產得以適當方式索償;及
- (xiii) enabling actual or proposed assignee or transferee of FPIL to evaluate FPIL.  
讓英國友誠國際的實際或建議承讓人或受讓人能夠評估英國友誠國際。
- 5 The passing of personal data to other third parties whether within or outside Hong Kong by FPIL for the purposes:  
英國友誠國際移交個人資料予香港境內或境外的其他第三方作有關用途:  
For the purposes, FPIL may provide your personal data to the following:  
英國友誠國際可就有關用途而向以下人士提供您的個人資料:
- (i) your financial adviser;  
您的理財顧問;
- (ii) companies carrying on reinsurance related business;  
經營再保險相關業務的公司;
- (iii) medical examiners and practitioners;  
醫生;
- (iv) claims investigation companies in the event of a claim;  
索償調查公司(在出現索償情況下);
- (v) any professional adviser, data processor, IT service provider, mailing house or third party service providers providing administration services to FPIL;  
向英國友誠國際提供任何專業顧問、資料處理員、資訊科技服務供應商、郵遞公司或提供管理服務的第三方供應商;
- (vi) researchers;  
調查機構/人員;
- (vii) any actual or proposed assignee of FPIL or transferee of FPIL's rights in respect of the customer;  
英國友誠國際的任何實際或建議承讓人或承繼英國友誠國際對客戶的權利的任何實際或建議受讓人;
- (viii) government agencies and authorities as required or permitted by law;  
法律規定或允許的政府機構及部門;
- (ix) any industry association or Federation; and  
任何保險業協會或聯會;及
- (x) any person pursuant to a court order.  
根據法院命令所指的任何人士。
- 6 You have various rights in relation to your personal data including accessing your data, and in some limited circumstances objecting to processing or having your data erased. You can find out more information about how to exercise these rights and details of who to contact with queries on our privacy practices by viewing our full privacy policy available on our website [www.fpinternational.com.hk/legal/privacy-and-cookies.jsp](https://www.fpinternational.com.hk/legal/privacy-and-cookies.jsp) or it can be provided upon request from our Data Protection Officer, Friends Provident International Limited, Royal Court, Castletown, Isle of Man, British Isles IM9 1RA.  
您就您的個人資料擁有各種權利,包括查閱您的資料,以及在某些有限的情況下反對處理或刪除您的資料。您可以瀏覽本公司的網站 <https://zh.fpinternational.com.hk/legal/privacy-and-cookies.jsp> 查閱完整的私隱政策,進一步了解有關如何行使這些權利以及查詢有關私隱慣例。您亦可向本公司的資料保護主任(地址: Friends Provident International Limited, Royal Court, Castletown, Isle of Man, British Isles IM9 1RA)索取完整的私隱政策。
- 7 Nothing in this PICS shall limit the rights of customers or insured persons under the PDPO.  
本聲明書所載內容不會限制您根據個人資料(私隱)條例享有的權利。

## 8 Declarations 聲明

I/We have read and understood this PICS.  
本人/我們已閱讀並明白本聲明書。

**Declarations 聲明**

I/We confirm that I/we have taken legal advice before signing this form or I/we have elected not to do so.  
本人／我們確認，本人／我們簽署本表格前，已諮詢法律意見或本人／我們已選擇不諮詢法律意見。

I/We understand that this appointment revokes any and all previous appointment of beneficiary/payee. I/We also understand that the appointment of beneficiary/payee made on this form shall be revoked by any surrender assignment or disposal of the policy and also by my death/the death of the survivor of us if at my death/the death of the survivor of us I am/we are survived by other persons named as 'life assured' on the schedule to the policy.  
本人／我們明白，此項委任會撤銷以前任何及所有受益人／收款人的委任。本人／我們也明白於此表格對受益人／收款人作出的委任，將因退保、轉讓或其他處置有關保單的舉動而撤銷，也可因本人身故／我們之中的尚存者身故後，仍有其他保單附表上指定為「受保人」的尚存者而撤銷。

This form shall form part of the policy and the appointment is made in accordance with the relevant provision of the policy. The expression 'beneficiary/payee' shall have the meaning given in the policy.

此表格是保單的一部分，並且此項委任乃根據保單的有關條文作出。「受益人／收款人」一詞具有保單所賦予的涵義。

**First (or only) policyholder**  
**第一（或唯一）保單持有人**

**Second policyholder**  
**第二保單持有人**

Signature(s)  
簽署



Date  
日期







**PLEASE SIGN & SEND THE COMPLETED FORM NO LATER THAN 14 DAYS TO US**

請將已填妥及簽署的表格於14天內交予本公司

**Email 電郵** : [polycyservicing@fpihk.com](mailto:polycyservicing@fpihk.com)

**Mail 郵寄** : Friends Provident International Hong Kong office, 803, 8/F., One Kowloon, No.1 Wang Yuen Street, Kowloon Bay, Hong Kong.  
英國友誠國際香港辦事處，香港九龍灣宏遠街1號一號九龍803室。

**Friends Provident International Limited:** Registered and Head Office: Royal Court, Castletown, Isle of Man, British Isles, IM9 1RA. Telephone: +44 (0)1624 821212 | Fax: +44 (0)1624 824405 | Website: [www.fpinternational.com](http://www.fpinternational.com). Isle of Man incorporated company number 11494C. Authorised and regulated by the Isle of Man Financial Services Authority. Provider of life assurance and investment products. Authorised by the Prudential Regulation Authority. Subject to regulation by the Financial Conduct Authority and limited regulation by the Prudential Regulation Authority. Details about the extent of our regulation by the Prudential Regulation Authority are available from us on request. **Hong Kong branch:** 803, 8/F., One Kowloon, No.1 Wang Yuen Street, Kowloon Bay, Hong Kong. Telephone: +852 2524 2027 | Fax: +852 2868 4983 | Website: [www.fpinternational.com.hk](http://www.fpinternational.com.hk). Authorised by the Insurance Authority of Hong Kong to conduct long-term insurance business in Hong Kong. Friends Provident International is a registered trademark and trading name of Friends Provident International Limited.

**英國友誠國際有限公司：**註冊及總辦事處：Royal Court, Castletown, Isle of Man, British Isles, IM9 1RA  
電話：+44(0) 1624 821212 | 傳真：+44(0) 1624 824405 | 網址：www.fpinternational.com  
馬恩島的註冊公司號碼為11494C 獲Isle of Man Financial Services Authority認可及監管  
人壽保險及投資產品的供應商 獲Prudential Regulation Authority認可 受Financial Conduct Authority監管及  
受Prudential Regulation Authority有限度監管 有關Prudential Regulation Authority之監管程度可向本公司查詢  
**香港分公司辦事處：**香港九龍灣宏遠街1號一號九龍803室 電話：+852 2524 2027 | 傳真：+852 2868 4983  
網址：www.fpinternational.com.hk 獲香港保險業監管局授權在香港經營長期保險業務  
英國友誠國際為英國友誠國際有限公司的註冊商標及商號