



# Switch/Redirection instruction 基金轉移／重新調配指示

Please sign and return the completed form  
請將已填妥及簽署的表格交回本公司

**Mail 郵寄:** Friends Provident International Limited

803, 8/F., One Kowloon, No.1 Wang Yuen Street, Kowloon Bay, Hong Kong  
英國友誠國際有限公司  
香港九龍灣宏遠街1號一號九龍803室

**Email 電郵:** ccs@fpiom.com

Our Switches Department will confirm receipt of each instruction by automated email. If you do not receive an automated acknowledgment from us, your instruction is deemed not to have been received and has not been processed.  
我們的交易部門將透過自動傳送電郵確認收到每項指示。如果閣下沒有收到我們的自動確認函，閣下的指示將被視作未收到且未被處理。

If you need any assistance in completing the form, please contact our customer hotline on +852 3550 6188 or email customerservicing@fpihk.com.  
如需協助或查詢，請致電我們的客戶服務熱線 +852 3550 6188 或電郵至 customerservicing@fpihk.com。

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

If you make a mistake, please cross it out and correct it, initialling any amendments. Please do not use correction fluid or any other method for deleting incorrect information.

如填寫表格時有錯誤，請刪除錯處並清楚填寫新資料。更正處須由填表人草簽核實更改。請勿使用塗改液或以其他方法刪改不正確的資料。

## Checklist 檢查清單

**Please tick to confirm the following before submitting your instruction.**  
在遞交指示前，請確認並勾選下列各項無誤。

Correct fund code.  
正確基金編號

The investment-linked funds you have selected are SFC authorised  
閣下選擇的投資相連基金為香港證券及期貨事務監察委員會認可

The investment-linked funds you have selected are available under your policy. Please refer to the Investment-linked Funds Leaflet.

已選擇的投資相連基金為閣下保單可供選擇的投資相連基金。請參閱投資相連基金小冊子。

From the combination of requested new funds and allocated future premiums, the instruction will not result in the policy holding more than 10 funds.

指示買入新基金及未來保費的重新調配不會令保單持有超過10項基金。

You have not included separate instructions for Initial Units and Accumulation Units (these cannot be switched separately).

您沒有分開初始單位及累積單位要求不同的轉換指示。（初始單位及累積單位不可分開轉換）

The instruction has been signed by all policyholders and assignees if applicable, or by a third party who has been granted Optional Management Authority.

基金轉換指示已由保單持有人及受讓人（如適用）簽署，或獲授權管理投資（不同授權選擇）的第三方簽署。

Policy number(s): 保單號碼：

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

Full Name 全名

Contact telephone number 聯絡電話號碼

**Second policyholder**  
第二保單持有人

**Option 1: Switch instructions 選擇一：基金轉換**

Please note that the proceeds generated from the Switch Out fund(s) will be reinvested as per the percentage split stated in the 'Switch In' section below.  
請注意由轉出基金所得金額，將按下列「轉入」部份所示基金百分比重新投資。

**Switch Out (Fund to sell) 轉出 (出售基金)**

(Please tick only one box to switch out) (請✓選一項轉出指示)

- ALL existing funds**  
所有現時基金
- Specific funds** (Please list down funds in the below table and ensure all fund code match the fund names)  
個別基金 (請在以下表格詳列基金編號及基金名稱)

Fund Code (Max 10) 基金編號(最多10項)	Fund Name 基金名稱	Percentage Switch Out 轉出百分比

**Switch In (Fund to buy) 轉入(買入基金)**

Fund Code (Max 10) 基金編號(最多10項)	Fund Name 基金名稱	Percentage Switch In 轉入百分比
		100%

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## Option 2: Investment of future premiums (Redirection) 選擇二：日後的保費投資（重新調配）

**Allocate future premiums as per new fund split shown in the 'Switch In' section above** (Instruction given on Page 2 of the form)  
按上述「轉入」部份所示基金百分比分配日後的保費（本表格第2頁的指示）

**Allocate future premium as per fund split in table below:**  
按下列表格基金百分比分配日後的保費投資：

Fund Code (Max 10) 基金編號（最多10項）	Fund Name 基金名稱	Reallocation Percentage 重新調配百分比
		100%

### Reminder 提示

**The policy can only hold a maximum of 10 funds. Should this instruction result in more than 10 funds being held at any time, including considering the investment of future premiums, all instructions will be declined.**

您的保單最多可持有10項基金。在任何時間如您的指示持有超過10項基金，包括日後的保費投資，您的所有指示將不獲執行。

**I/We hereby request and authorise you to act on the Switch and/or Redirection instruction in accordance with the relevant policy provisions.**

本人／我們在此要求並授權貴公司按照有關保單條款執行基金轉換及／或日後的保費重新調配。

### 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」）

- 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。
- 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。
- 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。

**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)**

- 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;
  - (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。

**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)**

- 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](http://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。

**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)

**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。

	First (or only) policyholder 第一 (或唯一) 保單持有人	Second policyholder 第二保單持有人	Optional Management Authority 獲授權管理投資
Signature(s) 簽署	<input type="text"/>	<input type="text"/>	or <input type="text"/>
Date 日期	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

**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: ccs@fpiom.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。

## Important notes 重要提示

### Processing fund switches 基金轉換處理

We will process your instruction on the day which we receive it, subject to:

我們將於收到您指示的當日進行處理, 但須滿足以下條件:

- **Your instruction being received by 12pm (UK time) on that day** 當日中午 12 點 (英國時間) 前收到您的指示
- **Our office being open for work on that day** 我們的辦事處於當日開放
- **All necessary documentation being supplied** 提供所有必要文件
- **Compliance with your policy Terms and Conditions.** 遵從您的政策條款及細則。

If, for whatever reason and further to the aforementioned criteria, we are unable to process your instruction on the day which we receive it, we will process it on our first working day thereafter.

如因上述條件等任何理由, 而導致我們無法在收到指示當日處理您的指示, 我們將在隨後的第一個工作日處理該指示。

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

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

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