



Request for Extended Cover Option or Paid Up Option

停付供款延續保障 / 停付供款延續投資申請表

Consultant name 保險顧問姓名

Consultant code 保險顧問編號

District 營業區

Policy number 保單號碼

Name of Policy Owner 保單持有人姓名

Contact telephone number 聯絡電話號碼

Please mark "✓" in
appropriate box

請在適當空格
內加上“✓”號

1 Section 1 第1項

Extended Cover Option or Paid Up Option questionnaire 申請停付供款延續保障 / 停付供款延續投資問卷

Being our valuable customer, your concerns are very important to us. Therefore, we would like to ensure you are aware of the implications of exercising the Extended Cover Option or Paid Up Option of your policy before maturity and also we are eager to understand the reason(s) of your request.

您是我們的尊貴客戶，我們十分關注您的需要。因此，我們希望確保您知道在保單期滿前申請停付供款延續保障 / 停付供款延續投資對您的影響，並期望了解您申請停付供款的原因。

Q1 Please state the reason(s) for you to exercise the Extended Cover Option or Paid Up Option of this policy.
請說明您申請停付供款延續保障 / 停付供款延續投資的原因。

- Financial reason 財務原因
- Emigrate to the other countries 移居其他國家
- Agent's service related 與保險顧問服務有關
- Servicing agent leaves the Company 您的保險顧問離開本公司
- Product features related 與產品特色有關
- Investment return related 與投資回報有關
- Claim results related 與索償結果有關
- Purchase another policy at the Company 購買本公司其他保單
- Purchase another policy in other company 購買其他公司的保單
- Others 其他

Q2 If you are thinking of switching to another insurer or buying a new policy, are you aware that you may need to pay a higher premium due to changes in your age and / or health condition?

如果您打算轉換其他保險公司或投購新保單，您是否明白可能會因為年齡及 / 或健康狀況的轉變而需要支付較高的保費？

- Yes 明白
- No 不明白
- Not applicable 不適用

Q3 We care about your concern, so we would like to see if you are aware of the protection implication of exercising the Extended Cover Option or Paid Up Option of your policy.

Are you aware that after exercising the Extended Cover Option, your policy may terminate without value when the surrender value minus any outstanding loans (and interest) is less than the Cost of Insurance?

Are you aware that after exercising the Paid Up Option, your insurance coverage will be terminated immediately and the policy becomes a pure investment policy? Your policy may terminate without value when the surrender value minus any outstanding loans (and interest) drops to zero?

我們很關注您的需要，並且希望了解您是否明白停付供款延續保障 / 停付供款延續投資會影響您的保障。

您是否知道行使停付供款延續保障，保單及保障可能會隨時因應退保金額價值扣除任何尚未清償的貸款（及其利息）後不足以支付壽險費用而終止，令您失去原有的保障？

您是否知道行使停付供款延續投資，保障更會即時終止，保單變成一張純投資的保單？而保單亦可能會隨時因應退保金額價值扣除任何尚未清償的貸款（及其利息）後跌至零而終止？

- Yes 是
 No 否

Q4 Before making your decision, we think it would be beneficial to have a better understanding of the policy situation. Have you ever received an illustration document showing the total amount you may get at policy maturity if the policy do not change to Extended Cover Option or Paid Up Option?

我們認為您決定申請停付供款前，應先了解保單的情況。您有否收過一份說明文件，解釋您繼續供款至保單期滿將會獲得的款項總額？

- Yes 有
 No 沒有

Q5 Instead of exercising the Extended Cover Option or Paid Up Option of the policy, you may have other choices (where relevant). Are you aware of these options? They may include:

除了行使停付供款延續保障 / 停付供款延續投資外，您還可以有其他選擇（如適用者）的。您知道有以下的選擇嗎？它們包括：

- i) Reducing the benefit amount 減低保障額；
 ii) Adjusting protection and savings portion of the premium 調整保障及儲蓄的保費比重；
 iii) Policy loan 申請保單貸款；
 iv) Reducing premium / contribution 減低保費 / 供款；
 v) Change of payment frequency to monthly mode 調整付款次數至月繳方式；
 vi) Contribution holiday 申請供款假期（如適用）

- Yes 知道
 No – go to Q7 不知道（請跳至問題7）

Q6 If yes to Q5, how did you know about these options?

如問題5答「知道」，您是怎樣知道這些選擇的？

- From insurance consultant / agent 透過保險顧問 / 代理
 From customer services staff 透過客戶服務職員
 From policy contract 透過保單文件
 Others 其他

Q7 Do you know your current insurance consultant / agent and do you have his / her contact telephone number?

您認識現時為您服務的保險顧問 / 代理，並知道他 / 她的聯絡電話號碼嗎？

- Name only. Name 只知道姓名是
 Name and contact number. Name 姓名及聯絡電話。姓名是
 Don't know my current consultant / agent – go to Q12 我並不認識現時的保險顧問 / 代理（請跳至問題12）

Q8 Your insurance consultant / agent may help you understand your policy better. Have you contacted your insurance consultant / agent regarding this Extended Cover Option or Paid Up Option request?

您的保險顧問能幫助您了解您的保單。您有沒有為了這次申請停付供款延續保障 / 停付供款延續投資，聯絡您的保險顧問 / 代理？

- Yes 有
 No 沒有

Q9 How would you evaluate the services provided by your current insurance consultant / agent?

您怎樣評價現時為您服務的保險顧問 / 代理？

- Good 良好
 Average 一般
 Below average 低於一般

Q10 How would you evaluate your current insurance consultant / agent in the following aspects:

您對現時為您服務的保險顧問 / 代理在下列幾方面有什麼評價？

	Good 良好	Average 一般	Below average 低於一般
Frequency of contact 聯絡頻密度	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trustworthiness 誠信程度	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service attitude 服務態度	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professionalism 專業水平	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q11 When did your current insurance consultant / agent last contact you?

現時為您服務的保險顧問 / 代理對上一次與您聯絡是何時？

- Within 1 month 1個月內
 Over 1 month to 3 months 超過1個月，但未過3個月
 Over 3 months to 1 year 超過3個月，但未過1年
 Over 1 year 超過1年
 Never 從未聯絡

Q12 Have you contacted our customer services staff for this Extended Cover Option or Paid Up Option request?

您有沒有為了這次申請停付供款延續保障 / 停付供款延續投資，聯絡我們的客戶服務職員？

- Yes, other options have been explained 有，他們已經向我解釋有其他的選擇
 Yes, but other options have not been explained 有，但他們沒有向我解釋有其他的選擇
 No 沒有

Q13 How would you evaluate the services provided by our customer services staff?

您怎樣評價本公司客戶服務職員的服務？

- Good 良好
 Average 一般
 Below average 低於一般
 Never call customer services hotline 從未致電客戶服務熱線

Q14 How did you get the Extended Cover Option or Paid Up Option request form?

您怎樣取得申請停付供款延續保障 / 停付供款延續投資申請表？

- From current insurance consultant / agent 透過現時的保險顧問 / 代理
 From customer services staff 透過客戶服務職員
 Others 其他

Q15 To help us serve you better in the future, overall speaking, how satisfied are you with the services provided by the Company?

為了使我們更精益求精，請告訴我們，您對本公司提供的服務感到滿意嗎？

- Very satisfied 非常滿意
 Quite satisfied 頗滿意
 Average 一般
 Not quite satisfied 不太滿意
 Definitely not satisfied 完全不滿意

The service that has impressed me is
令我留下深刻印象的服務是

The area for improvement would be
有待改善之處是

Please select either A or B and put "✓" in appropriate box

只可選擇甲或乙，並於適當空格內加上“✓”號

2 Section 2 第2項

Type of Request 申請類別

- A. Extended Cover Option 申請停付供款延續保障
B. Paid Up 申請停付供款延續投資

Effective Date# or the earliest unpaid premium due date 生效日期#或最早未付保費到期日：_____

If the relevant premium has already been paid, the effective date will be adjusted to the earliest unpaid premium due date.
如所填寫的生效日期的保費已繳交，我們將自動更改生效日期為最早未付保費到期日。

3 Section 3 第3項

Declaration 聲明

I HEREBY DECLARE AND AGREE that (1) all information in this form whether or not written by my own hand is to the best of my knowledge and belief complete and true; (2) if the relevant persons of the Policy fail to provide any information requested in this application, the Company shall have the right to reject or delay such application; (3) any personal information collected or held by the Company, whether contained in this form or otherwise obtained, may be used by the Company, or disclosed to or transferred to any individual or organization within or outside Hong Kong for the purpose to (i) assess, process and deal with this application and to provide on-going insurance and customer services, by the Company and its affiliated company(ies), (ii) process and give effect to the Direct Debit Authorization, (iii) provide marketing material in respect of insurance related services of the Company or its affiliated company(ies) and (iv) process claims or analysis of the insurance.

I understand that I shall have the right of access to and to request correction of any personal information concerning relevant persons of this Policy held by the Company. A request for such access may be made in writing and addressed to the Personal Data Privacy Officer of the Company at 24-27/F, One Island East, 18 Westlands Road, Island East, Hong Kong.

本人聲明及同意(1)申請表內的一切資料，無論是否本人所填寫，均屬完全及確實無訛；(2)若保單的有關人士未能提供此申請所需資料，貴公司有權拒絕或延遲處理此申請；(3)一切由貴公司從此申請表或其他方式所收集或持有的個人資料，均可供貴公司使用或向香港境內或境外之任何人或機構披露作以下用途：(i)評核此項申請及提供保險和顧客服務；(ii)辦理直接付款授權書；(iii)提供貴公司及關連機構有關保險的推廣資料；(iv)處理保險的索償或有關之分析。

本人有權查閱及要求更改由貴公司所持有有關本人的任何個人資料。任何關於個人資料查閱或更改之要求，可向貴公司的個人資料私隱主任提出，地址為香港港島東華蘭路18號港島東中心24-27樓。

Signature of Consultant 保險顧問簽署

Date (DD/MM/YYYY) 日期 (日 / 月 / 年)

Signature of Owner / Assignee 保單持有人 / 受讓人簽署

Date (DD/MM/YYYY) 日期 (日 / 月 / 年)

NOTES 注意事項：

1. Please use BLUE ball pen to fill in the form 請以藍色原子筆填寫表格。

For Office Use Only 本公司內部專用

LPP :	Last doc rec'd date :	Exchange rate :
Payment method : C / T / P / O		
Send to : Company record / c-o Agent (District code :) / At present / Other
Remark :		

Zurich Insurance Group (Hong Kong)

24-27/F, One Island East, 18 Westlands Road, Island East, Hong Kong
Customer Services Hotline: (852) 2535 3500 Fax: (852) 2967 1384 <http://www.zurich.com.hk>

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