

Consultant name	
Consultant code	
District	



Private & Confidential

Request for Extended Cover Option or Paid Up Option

Policy number	Name of Policy Owner	Contact telephone number
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Section 1 Extended Cover Option or Paid Up Option questionnaire (Please mark "✓" in appropriate box)

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.

- Q1 Please state the reason(s) for you to exercise the Extended Cover Option or Paid Up Option of this policy.
- Financial reason
 - Emigrate to the other countries
 - Agent's service related
 - Servicing agent leaves the Company
 - Product features related
 - Investment return related
 - Claim results related
 - Purchase another policy at the Company
 - Purchase another policy in other company
 - Others

- 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?
- Yes
 - No
 - Not applicable

- 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?
- Yes
 - No

- 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?
- Yes
 - No

- 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:
- i) Reducing the benefit amount;
 - ii) Adjusting protection and savings portion of the premium;
 - iii) Policy loan;
 - iv) Reducing premium / contribution;
 - v) Change of payment frequency to monthly mode;
 - vi) Contribution holiday
- Yes
 - No – go to Q7

- Q6 If yes to Q5, how did you know about these options?
- From insurance consultant / agent
 - From customer services staff
 - From policy contract
 - Others

- Q7 Do you know your current insurance consultant / agent and do you have his / her contact telephone number?
- Name only. Name
 - Name and contact number. Name
 - Don't know my current consultant / agent – go to Q12

- 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?
- Yes
 - No

- Q9 How would you evaluate the services provided by your current insurance consultant / agent?
- Good
 - Average
 - Below average

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

	Good	Average	Below average
Frequency of contact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trustworthiness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service attitude	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professionalism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- Q11 When did your current insurance consultant / agent last contact you?
- Within 1 month
 - Over 1 month to 3 months
 - Over 3 months to 1 year
 - Over 1 year
 - Never

- Q12 Have you contacted our customer services staff for this Extended Cover Option or Paid Up Option request?
- Yes, other options have been explained
 - Yes, but other options have not been explained
 - No

- Q13 How would you evaluate the services provided by our customer services staff?
- Good
 - Average
 - Below average
 - Never call customer services hotline

- Q14 How did you get the Extended Cover Option or Paid Up Option request form?
- From current insurance consultant / agent
 - From customer services staff
 - Others

- Q15 To help us serve you better in the future, overall speaking, how satisfied are you with the services provided by the Company?
- Very satisfied
 - Quite satisfied
 - Average
 - Not quite satisfied
 - Definitely not satisfied

The service that has impressed me is

The area for improvement would be

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Section 2 Type of Request (Please select either A or B and put "✓" in appropriate box)

* Delete as inappropriate

- A. Extended Cover Option
B. Paid Up

Section 3 Declaration

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.

Signature of Consultant

Date (dd/mm/yyyy)

Signature of Owner / Assignee

Date (dd/mm/yyyy)

NOTES :

1. Please use BLUE ball pen to fill in the form.

For Office Use Only

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 :		