

付款聲明書

Payment Declaration Form

PSF-PDF

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付款人繳付保費。</p> <p>2. 此聲明書適用於由投保人 / 保單持有人以指定方法繳款或其他合資格的付款人之繳款。合資格的付款人類別詳見第一部份的「付款人身份」。</p> <p>3. 如合資格的付款人繳付港幣 120,000、美元 15,000 或人民幣 96,000 以上, 請遞交其身份證明文件核實副本。如繳付金額為港幣 500,000、美元 62,500 或人民幣 400,000 以上, 請遞交合資格的付款人與投保人 / 保單持有人之關係證明文件核實副本。</p> <p>4. 如款項是以香港金融管理局註冊的銀行發出的不記名支票、銀行本票或匯票(統稱為「票據」)支付, 而每張保單每年累計金額不超過港幣 400,000、美元 50,000 或人民幣 320,000, 請填寫此表格。如超過上述金額, 請必須提交銀行收據 / 銀行賬戶記錄的副本以確認付款人身份。若非由本地銀行發出之票據, 不論任何金額, 必須同時提交銀行收據 / 銀行賬戶記錄的副本以確認付款人身份。</p> <p>5. 合資格的付款人純粹代表投保人 / 保單持有人繳款, 並不會因此而獲賦予任何保單權益及 / 或權利。如首期款項以信用卡支付, 退款將經該信用卡退回。</p> <p>6. 請在適當方格內加上 ✓ 號, 並用正楷填寫。</p> <p>7. 投保人 / 保單持有人之簽署必須與本公司之存檔相符。</p> <p>8. 投保人 / 保單持有人及合資格的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>9. 請於簽署日起計 30 天內遞交至本公司辦理手續。</p> <p>10. 我們或會索取額外資料或證明(包括但不限於付款人之財富來源及資金來源證明)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>11. 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"><li>• (香港) 客戶服務熱線: (852) 3169 5500</li><li>• (內地) 客戶服務熱線: 95500</li><li>• 電郵: wecare@cpiclife.com.hk</li></ul> <p>1. China Pacific Life Insurance (H.K.) Company Limited (hereafter called "CPIC Life (HK)", "the Company" or "We") only accept(s) premium payment(s) by the Proposer / Policy Owner or Eligible Payor.</p> <p>2. This form is applicable for specific payment methods made by the Proposer / Policy Owner or any payment made by the Eligible Payor. Designated Eligible Payor refers to the part "Identity of Payor" of Section I.</p> <p>3. If the payment amount paid by the Eligible Payor is HKD120,000, USD15,000 or RMB96,000 above, please submit a certified true copy of his / her identity document. If the amount of payment is HKD500,000, USD62,500 or RMB400,000 above, please submit a certified true copy of relationship proof between the Eligible Payor and the Proposer / Policy Owner.</p> <p>4. If the payment is made by anonymous cheque, cashier's order or local bank draft (collectively referred as "Cheque(s)") issued by HKMA registered bank and the aggregate payment amount does not exceed HKD400,000, USD50,000 or RMB320,000 per policy per year, please complete this form. If the aggregate payment amount exceeds the aforesaid amount, please also submit copy of bank receipt / bank account statements for payor identification. If payment is made by Cheque issued by non-HKMA registered bank, regardless of the amount, please submit the bank receipt / bank account statements for payor identification.</p> <p>5. The Eligible Payor makes the payment(s) solely on behalf of the Proposer / Policy Owner and shall not be entitled to any benefit and / or right under the policy. If the initial payment is paid by credit card, a refund will be made through such credit card.</p> <p>6. Please ✓ the appropriate box(es) and complete in BLOCK LETTERS.</p> <p>7. The signature of the Proposer / Policy Owner must be consistent with that in the Company's record.</p> <p>8. The Proposer / Policy Owner and the Eligible Payor should endorse any changes or amendments in this form in full signature. Please do not sign a blank or incomplete form.</p> <p>9. This form must be received by the Company within 30 days of the date of its signing.</p> <p>10. We may request additional documents or proof (including but not limited to proof of source of wealth and source of fund of payor) for our processing of the payment received 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 to be rejected.</p> <p>11. 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"><li>• Hong Kong Customer Service Hotline: (852) 3169 5500</li><li>• Mainland Customer Service Hotline: 95500</li><li>• Email: wecare@cpiclife.com.hk</li></ul>

第一部份 付款人資料 Section I Payor Information

付款人身份  
Identity of Payor

☐ 投保人 / 保單持有人 Proposer / Policy Owner

☐ 合資格的付款人(個人) Eligible Payor (Individual)

請選擇關係 Please select the relationship:

☐ 受保人 Insured

☐ 投保人 / 保單持有人之配偶 Spouse of Proposer / Policy Owner

☐ 投保人 / 保單持有人之子女 Child of Proposer / Policy Owner

☐ 投保人 / 保單持有人之父母 Parent of Proposer / Policy Owner

☐ 合資格的付款人(實體) Eligible Payor (Entity)

請選擇關係 Please select the relationship:

☐ 實體為投保人 / 保單持有人 / 受保人或其配偶全權持有或持有股份超過 50%或在股東大會上行使或控制 50%以上投票權的公司

The entity is a company wholly owned or in which more than 50% of the shares are held or of which more than 50% of the voting rights at general meetings of the entity are exercised or controlled by the Proposer / Policy Owner / Insured or his / her spouse directly or indirectly

☐ 實體與投保人 / 保單持有人存在轉讓抵押貸款關係

There is a collateral assignment between the entity and the Proposer / Policy Owner

註：實體必須為公司，並符合以下所有要求：

Note: Entity must be in the form of a company and subject to all the following requirements:

i. 必須提供經認證的商業登記證及公司註冊證書及最近期週年申報表(或同等可顯示公司身份和所有權信息，註冊地址和營業地址的文件)之核實副本；

Certified True Copy of Business Registration, Certificate of Incorporation and the latest annual return (or equivalent document showing the company's identification and ownership information, registered address and business address) must be provided;

ii. 如為投保人 / 保單持有人 / 受保人或其配偶部份持股的公司或在股東大會上行使或控制部份投票權的公司，必須同時提供以下額外文件：

The following additional documents are required if the entity is partially owned by shares, or of which the voting rights at general meetings of the entity are partially exercised or controlled by the Proposer / Policy Owner / Insured or his / her spouse directly or indirectly:

a. 所有董事及持股大於 25%的控股股東或在股東大會上行使或控制 25%以上投票權的身份證明文件之核實副本及居住地址；及

Certified True Copy of the identity documents and residential address of all directors and shareholders holding more than 25% of the shares or exercising or controlling more than 25% of the voting rights at general meetings of the entity; and

b. 實體與投保人 / 保單持有人或其配偶之關係證明之核實副本；及

Certified True Copy of the proof of relationship between the entity and the Proposer / Policy Owner or his/ her spouse; and

c. 股東會議記錄證明董事會同意付款及公司章程大綱之核實副本

Board Resolutions to show the payment consent from the directors and Certified True Copy of Articles of Association

☐ 其他(請註明) Others (Please specify): \_\_\_\_\_

註：除上述訂明之合資格的付款人，其他關係必須經我們批准

Note: Apart from the above-specified Eligible Payors, others are subject to our approval.

第一部份 付款人資料 (續) Section I Payor Information (Continued)			
個人付款人 Individual Payor		實體付款人 Entity Payor	
英文姓名 (以身份證明文件為準) Full Name in English (As shown on Identity Document)	姓氏 Surname	公司英文全名 Company Full Name	
	名字 Given Name		
中文姓名 (以身份證明文件為準) Full Name in Chinese (As shown on Identity Document)	姓氏 Surname	公司中文全名(如有) Chinese Full Name (if any):	
	名字 Given Name		
性別 Sex	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female		註冊或成立或登記日期 Date of Incorporation, Establishment or Registration  日 DD / 月 MM / 年 YYYY
出生日期 Date of Birth	日 DD / 月 MM / 年 YYYY		
國籍 / 地區 Nationality / Region	<input type="checkbox"/> 香港 Hong Kong <input type="checkbox"/> 中國內地 Mainland China <input type="checkbox"/> 其他(請註明) Others (Please specify) _____		<input type="checkbox"/> 香港 Hong Kong <input type="checkbox"/> 中國內地 Mainland China <input type="checkbox"/> 其他(請註明) Others (Please specify) _____
身份證明文件類型及號碼 Type of the Identity Document	<input type="checkbox"/> 身份證號碼 Identity Card No.: _____  <input type="checkbox"/> 護照號碼 Passport No.: _____ 簽發國家 / 地區 Country / Region of Issue _____  <input type="checkbox"/> 其他(請註明) Others (Please specify): _____ 簽發國家 / 地區 Country / Region of Issue _____		公司註冊證書 / 商業登記證編號 Certificate of Incorporation No. / Business Registration No.  簽發國家 / 地區 Country / Region of Issue _____  <input type="checkbox"/> 公司註冊證書編號 Certificate of Incorporation No.: _____ 簽發國家 / 地區 Country / Region of Issue _____  <input type="checkbox"/> 商業登記證編號 Business Registration No.: _____ 簽發國家 / 地區 Country / Region of Issue _____  <input type="checkbox"/> 其他(請註明) Others (Please specify): _____ 簽發國家 / 地區 Country / Region of Issue _____
	聯絡電話 Contact no.		

第一部份 付款人資料 (續) Section I Payor Information (Continued)

個人付款人 Individual Payor		實體付款人 Entity Payor	
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: _____		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: _____		營業地址 Business 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: _____	
職業 Occupation 僱主名稱 Name of Employer _____ 公司業務性質/行業 Nature of Business/ Industry _____ 職位 Position _____ 受僱於現職年期 No. of years in current job _____		公司行業 Industry of business 業務性質 Nature of business _____ 營業年期 Years of business _____	
財富來源 Source of Wealth (可多選 Multiple Selection)	<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，請詳述 Others, please specify _____ _____
資金來源 Source of Fund (可多選 Multiple Selection)	<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，請詳述 Others, please specify _____ _____
由合資格的付款人繳款之原因 Reason for Payment made by the Eligible Payor	<input type="checkbox"/> 投保人 / 保單持有人為退休人士 Proposer / Policy Owner is a retiree <input type="checkbox"/> 投保人 / 保單持有人為學生 Proposer / Policy Owner is a student <input type="checkbox"/> 投保人 / 保單持有人為無業人士 Proposer / Policy Owner is an unemployed person <input type="checkbox"/> 作為禮物饋贈家人 As a gift for family members <input type="checkbox"/> 投保人 / 保單持有人依靠所屬 / 擁有的公司支付保費 Proposer / Policy Owner relies on the owned company to pay premiums <input type="checkbox"/> 其他原因，請詳述（例如：要員保單）Other reason, please specify (e.g. key man insurance policy): _____		
經銀行存入現金付款之原因 Reason for Cash Deposit via Bank			

## 第二部份 付款資料 Section II Payment Information

### 繳款日期 / 票據簽發日期 Payment Date / Cheque Issue Date

(不適用於自動轉賬繳費 Not applicable for payment by autopay)

日 DD / 月 MM / 年 YYYY

### 繳款金額 Payment Amount

☐ 港幣 HKD \$ \_\_\_\_\_  
☐ 美元 USD \$ \_\_\_\_\_  
☐ 人民幣 RMB \$ \_\_\_\_\_

### 繳款方法 Payment Method

#### ☐ 支票 Cheque

簽發銀行 Issuing Bank : \_\_\_\_\_ 票據號碼 Cheque No. : \_\_\_\_\_

#### ☐ 銀行本票 / 本地匯票 Cashier's Order / Local Bank Draft

簽發銀行 Issuing Bank : \_\_\_\_\_ 票據號碼 Cheque No. : \_\_\_\_\_

#### ☐ 經銀行存入現金 Cash Deposit via Bank

#### ☐ 轉數快 Faster Payment System

#### ☐ 電匯 / 轉賬 / 本地跨行轉賬 Telegraphic Transfer / Transfer / CHATS

#### ☐ 自動轉賬 Autopay

#### ☐ 其他 Others

### 繳款用途 Purpose of Payment

- ☐ 首期保費 Initial premium #  
☐ 續期保費 Renewal premium #  
☐ 償還貸款 Loan repayment  
☐ 保單更改 Policy change  
☐ 其他 (請註明) Others (Please specify) \_\_\_\_\_

# 不記名票據只適用作繳交保費之用  
Anonymous Cheques can be used for premium payment only.

## 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. 本人 / 我們，作為投保人 / 保單持有人 / 合資格的付款人，特此向太保壽險香港聲明上述票據確實由本人購買或由本人擁有之銀行賬戶中扣款購買（適用於不記名票據）。
  4. 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。
  5. 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。
  6. 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」及「中國內地私隱附錄(適用於中國內地的客戶)」(下稱「私隱附錄」)。本人 / 我們特此確認並同意太保壽險香港根據「個人資料收集聲明」使用和移轉本人 / 我們的個人資料及按照「私隱附錄」所述方式處理、使用和傳輸本人的個人資料以及敏感個人資料。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「個人資料收集聲明」所述的承轉人的類別。
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. I / We, the Proposer / Policy Owner / Eligible Payor, hereby declare to CPIC Life (HK) that the above-mentioned Cheque was purchased by myself or debiting funds from my bank account (Applicable for Cheque(s) without the full name of the payor).
  4. 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.
  5. 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.
  6. I / We acknowledge and confirm that I / we have read and understand the Personal Information Collection Statement and Privacy Addendum for Mainland China (applicable to customers located in Mainland China) (Privacy Addendum) 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 and CPIC Life (HK) can process, use and transfer my personal data and Sensitive Personal Data as set out in the Privacy Addendum. 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)

合資格的付款人簽署 (非投保人 / 保單持有人) 及公司蓋章\*  
Signature of Eligible Payor (if not Proposer / Policy Owner) and Company Chop\*

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

獲授權簽署人之姓名及職位 Full Name and Job Title of the Authorized Signatory\*

\*註：公司蓋章、姓名及職位只適用實體付款人  
Note: Company Chop, Full Name and Job Title are only applicable for entity payor

請參閱下頁的「個人資料收集聲明」及「私隱附錄」。

Please read the Personal Information Collection Statement and Privacy Addendum 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所有產品和服務,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:

- 處理保險產品或服務的申請及核實相關的資格;
- 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;
- 管理已簽發的保單;
- 處理付款指示;
- 處理任何保險索償;
- 進行統計及精算研究;
- 資料核對,或開展核對程式(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;
- 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);
- 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;
- 直接推廣;
- 進行保單檢閱及需要分析;
- 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;
- 在收集時列明的其他用途;
- 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。

- 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;
- 任何進行保險及 / 或再保險有關業務的公司;
- 任何與太保壽險香港有合約的持牌保險中介人;
- 任何保險索償調查人員;
- 任何夥伴金融機構;
- 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;
- 任何不時存在的保險業協會及聯會;
- 任何提供保險及 / 或再保險相關業務的其他服務供應商;
- 任何政府部門及司法機構或監管機構;
- 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他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 services.

**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 center 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.

## 中國內地私隱附錄 Privacy Addendum for Mainland China

本附錄僅適用於位於中國內地的客戶。本私隱附錄構成太保壽險(香港)的《個人資料收集聲明》的組成部分，僅適用於位於中國內地並從香港接收我們產品及/或產品相關服務的個人客戶。如本附錄與本公司的《個人資料收集聲明》中的條款存有任何衝突或不一致，應以本附錄之條款為準。

作為您的保單續發機構，太保壽險(香港)是您個人資料的處理者。根據中國內地有關資訊保護的法律，您可以通過 [wecare@cpiclife.com.hk](mailto:wecare@cpiclife.com.hk) 與我們取得聯繫。根據中國內地法律的要求，當我們向您提供產品及與服務時，我們可能需要就如何使用您的個人資料征得您的同意。對於某些基於中國內地法律被視為敏感的個人資料，我們可能需要征得您的單獨同意。您的個人資料將被收集、訪問、處理、使用、存儲和/或傳輸至中國內地以外的地區，其類型、目的、方法、權利行使方式和聯繫資訊詳見我們的《個人資料收集聲明》。如果您不同意本私隱附錄，我們可能無法向您提供您購買的產品，並且無法向您提供相關的服務。

根據中國內地有關數據保護的法律，我們將基於您的同意處理您的個人資料，除非您的個人資料屬於以下情況：

- 為訂立或履行您作為一方當事人的合同所必需的；
- 為履行法定義務所必需的；
- 為應對突發公共衛生事件所必需的；
- 為保護自然人的生命健康和財產安全所必需的；
- 為公共利益實施新聞報道、輿論監督行為在合理範圍內處理的個人資料；或
- 個人自行公開或者已經合法公開的個人資料。

部分我們收集的您的特定個人資料屬中國內地現行數據保護相關法律法規所定義的敏感個人資料，即如果被洩露或被非法使用，可能對您的權益、人身或財產安全產生重大影響的個人資料，包括但不限於金融賬戶、身份證件號碼、醫療健康資訊、生物特徵識別、宗教信仰、特定身份、個人行蹤軌跡有關的資料或未滿 14 周歲未成年人的個人資料。我們收集敏感個人資料僅用於特定目的，例如簽發您的保單，處理您提出的更改個人資料的要求，以及調查您向我們提交的所有索賠申請。如我們未能處理閣下的敏感個人資料，將無法為閣下提供相關的產品及/或服務。我們一般不會直接收集未滿 14 周歲兒童的個人資料，但在提供相關服務所需的情況下，我們可能會向兒童的父母或法定監護人收集此類個人資料，而父母或法定監護人可行使未成年人的權利並同意我們使用其個人資料。我們採用和實施嚴格的保安政策，以保護閣下敏感個人資料的機密性和隱私性。

我們將在必要期限內保留您的個人資料，以實現我們的《個人資料收集聲明》和本私隱附錄所述處理您的個人資料的必要目的。我們將通過以下一項或多項的因素來確定您個人資料的保存期限：我們是否與您仍然維持著法律關係；我們必須遵守的法律義務所要求的；以及是否涉及我們的法律地位（如適用的訴訟時效、訴訟、審計或監管調查）。閣下的個人資料此後將被安全刪除或處置。除非由於法定原因我們不得不保留某些資訊，否則我們將僅在法律法規要求的限度內處理該等資訊且不會將其用於我們的日常業務活動。

為了管理您的保單以及向您提供產品和服務，我們可能將您的個人資料提供給我們的《個人資料收集聲明》中的持牌保險中介人、承保人、第三方服務提供商、醫療機構例如醫院、醫療診所以及實驗室測試設施、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、審計師、法律顧問、財務顧問、再保險人、政府部門及司法機構、監管機構、保險業協會及聯會、銀行、支付結算代理人、第三方支付服務提供商和索賠調查機構。目前，我們將您的個人資料提供給位於中國內地的中國太平洋人壽保險股份有限公司（[life.cpic.com.cn/xrsbx/](http://life.cpic.com.cn/xrsbx/)）處理，以便向您提供產品和服務，其類型、目的和方法詳見我們的《個人資料收集聲明》。

個人資料的接收方可以收集和處理您的個人資料，並將其返還給我們，以便我們管理您的保單。我們向接收方提供的個人資料類型包括但不限於：您的個人身份資訊、醫療資訊、過去的健康記錄/資訊和財務資訊。我們會通過電子或其他方式向接收方提供您的個人資料，並按照我們的指示、私隱政策以及任何其他適當的保密和安全措施，為我們處理此類資訊。根據中國內地適用的法律法規，我們在控制、處理和傳輸您的個人資料和敏感的個人資料時，將採取最高的安全措施。我們還制定了自己的安全政策以保護您的個人資料和敏感個人資料。

除我們的《個人資料收集聲明》中規定的訪問權外，您還有權獲得我們持有的您個人資料的副本、撤回對我們使用閣下個人資料的同意、有權限制或反對他人處理閣下的個人資料並有權在下列任何情形發生時要求刪除您的個人資料：

- 處理您的個人資料的目的已經達到或未能達到，或該個人資料對於達到該目的已無必要；
- 我們已停止提供產品或服務，或保留期限已屆滿；
- 您撤回同意；
- 我們違反了現行數據保護相關的法律法規。

您可以通過本私隱附錄中列出的聯繫方式與我們聯繫，以撤回對我們處理您個人資料的同意。如果您撤回對我們處理您的個人資料的同意，我們可能無法向您提供相關產品和/或服務。如閣下有意根據中國個人資料保護法行使閣下的任何權利，可以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。

如果與本私隱附錄的規定不一致時，包括但不限於定義（例如敏感個人資料），則以中國《網絡安全法》、《個人資料保護法》、《數據安全法》其實施辦法和其他網絡安全和數據保護相關的中華人民共和國法律法規為準。

我們有權不時更新本私隱附錄，並通過我們網站或應用平臺（視具體情況而定）發布本私隱附錄的更新以向您通知相關內容。



This Addendum only applies to you if you are located in Mainland China. This Privacy Addendum forms part and parcel of CPIC Life (HK)'s Personal Information Collection Statement and specific to individual customers who are located in Mainland China and receiving our product(s) and/or service(s) associated with the product(s) from Hong Kong. If there is any conflict or inconsistency between the terms of this Addendum and any terms set forth in CPIC Life (HK)'s Personal Information Collection Statement, the terms of this Addendum shall prevail.

CPIC Life (HK) (hereinafter also referred to as "we", "us" or "our"), the issuer of your insurance policy, is the processor of your personal data and you may reach us via [wecare@cpiclife.com.hk](mailto:wecare@cpiclife.com.hk) in accordance with the applicable data protection laws of Mainland China. As required by the laws of Mainland China, when we provide you with the product(s) and the service(s), we may need to seek your consent on how we use your personal data and, in relation to certain personal data which is considered sensitive based on the laws of Mainland China, we may need your separate consent. Your personal data will be collected, accessed, processed, used, stored, and/or transferred outside of Mainland China, with the types, purposes, methods, way of right exercise and contact information set out in our Personal Information Collection Statement. If you do not consent to this Privacy Addendum, we may not be able to provide you with the product(s) you are purchasing from us and offer you with the service(s).

Under the applicable data protection laws in Mainland China, we will process your personal data based on your consent, unless your personal data are:

- necessary to conclude or perform a contract in which you are a party;
- necessary for us to comply with legal obligations;
- necessary to respond to public health emergencies;
- necessary to protect individuals' life, health, and property safety;
- reasonably processed in news reporting and public opinion oversight for public interests; or
- publicly available, because of your voluntary disclosure or a legal requirement, and reasonably processed.

Certain personal data that we collect about you is sensitive personal data as defined in the applicable data protection laws in Mainland China ("Sensitive Personal Data"), which is personal data that may materially impact your rights and interests, cause harm to your dignity, personal or property safety, if leaked or unlawfully used, including but not limited to financial accounts, national identification number, medical or health-related information, biometric identification, religious belief, specific identity, individual location tracking or any personal data of minors under the age of fourteen. We collect the Sensitive Personal Data only for specific purposes, such as assessing your application for the issuance of an insurance policy to you, processing your request of changes in personal data and investigation on any claims applications submitted to us. We will not be able to provide you with the product(s) and/or service(s) if we fail to process your Sensitive Personal Data. We generally do not directly collect personal data from a child under the age of fourteen but may collect such personal data from the parent or legal guardian of the child where such processing necessary for providing relevant services while the parent or legal guardian may exercise the minor's rights and consent to us. We adopt and implement strict security policies to protect the confidentiality and privacy of your sensitive personal information. We adopt and implement strict security policies to protect the confidentiality and privacy of your sensitive personal information.

We will retain your personal data for the period necessary to fulfill the necessary purposes of processing your personal data as outlined in our Personal Information Collection Statement and this Privacy Addendum. The criteria used to determine our retention periods may include one or more of the following: as long as we have an ongoing relationship with you; as required by a legal obligation to which we are subject; and as advisable in light of our legal position (such as in regard of the applicable statute of limitation, litigation, audits or regulatory investigation). Your personal data will be securely deleted or disposed of thereafter. Unless we have to retain certain data due to legal reasons, we will only process such data to the extent required by laws and regulations and will not use it in our daily business activities.

We may also provide your personal data to other recipients, within or outside Mainland China as set out in our Personal Information Collection Statement including but not limited to any licensed insurance intermediaries, insurers, third party service providers, medical institutions such as hospitals, medical clinics and laboratory testing facilities, China Pacific Insurance (Group) Co., Ltd. ("CPIC Group") and any other companies within the Group, auditors, legal advisors, financial advisors, reinsurers, governmental and judicial bodies, regulators, associations and federations of the insurance industry, banks, payment settlement agents, third party payment service providers and claims investigation organizations, for the purpose of the administration of your insurance policies and the provision of product(s) and service(s) to you. Currently, we provide your personal data to China Pacific Life Insurance Co., Ltd. ([life.cpic.com.cn/xrsbx/](http://life.cpic.com.cn/xrsbx/)) which is located in Mainland China for processing for the purpose of providing you with the product(s) and service(s), with the types, purposes and methods as set out in our Personal Information Collection Statement.

The recipient(s) of your personal data may collect and process your personal data and return to us for the purpose of the administration of your insurance policies. The types of personal data that we provide to the recipients include without limitation personally-identifiable information, your medical information, your past health records/information, and your financial information. We may deliver your personal data through electronic means or other mode of dispatch to the recipients to process such information for us in accordance with our instructions and in compliance with our privacy policy as well as any other appropriate confidentiality and security measures. In compliance with the applicable rules and regulations of Mainland China, we implement maximum security in controlling, processing and transferring of your personal data and Sensitive Personal Data. We also adopt our own security policies to safeguard your personal data and Sensitive Personal Data.

In addition to the access rights set forth in our Personal Information Collection Statement, you have the right to obtain a copy of your personal data held by us, the right to withdraw consent to use of such personal data, the right to restrict or object processing of such personal data and the right to request us to delete such personal data under any of the following circumstances:

- where the purposes of processing your personal data have been achieved or have failed to be achieved, or the personal data is no longer necessary for achieving the purposes;
- where we have ceased to provide the product(s) or service(s), or the retention period has expired;
- where you have withdrawn your consent; and
- where we have violated the applicable data protection laws and regulations.

You may withdraw your consent to our use of your personal data by contacting us through the contact details set out in this Privacy Addendum. If you withdraw your consent to our processing of your personal data, we may not be able to provide the relevant product(s) and/or service(s) to you. If you wish to exercise any of your rights under the Personal Information Protection Law of China, you may make your request by writing to our Data Protection Officer at Room 1802, 18/F, Lee Garden One, 33 Hysan Avenue, Causeway Bay, Hong Kong.

To the extent inconsistent with the provisions of this Privacy Addendum, including but not limited to definitions (e.g., Sensitive Personal Data), China's Cybersecurity Law, Personal Information Protection Law, Data Security Law, their implementing measures and other Chinese laws and regulations in relation to cybersecurity and data protection will prevail.

We have the right to update this Privacy Addendum from time to time and we will notify you of our updates to this Privacy Addendum by posting it on our website or application platforms (as the case may be).