

Third Party Payment Declaration Form

第三者付款聲明書

☐ Please tick the appropriate box. 請在適當方格內填上√號。

* Please delete where appropriate. 請刪去不適用者。



Part 1 第一部分 Personal & Policy Details 個人及保單資料		
Proposal / Policy No. 投保書/保單號碼		
Billing No. 繳費編號		
Name of Life Proposed / Life Assured 受保人姓名		
Name of Proposer / Policyowner 投保人/保單持有人姓名		
Full Name of Third Party Payor 第三者付款人全名	English 英文	Chinese 中文
Relationship between Third Party Payor and *Proposer / Policyowner / Life Proposed / Life Assured 第三者付款人與 *投保人/保單持有人/受保人的關係 Note 備註: For third party payments, only payments by person(s) in the specified categories will be accepted. 就第三者付款而言, 只接受由指定類別人士之付款。	<input type="checkbox"/> Spouse 配偶 <input type="checkbox"/> Sibling 兄弟姊妹 <input type="checkbox"/> Parents-in-law 岳父母 <input type="checkbox"/> Parent 父母 <input type="checkbox"/> Grandparent 祖父母 <input type="checkbox"/> Legal Guardian 合法監護人 <input type="checkbox"/> Child 子女 <input type="checkbox"/> Grandchild 孫兒女 (Please provide supporting document. 請提供證明文件。) <input type="checkbox"/> Company solely/partially owned by the *Proposer/Policyowner/Life Proposed/Life Assured or their spouse, parents or children *投保人/保單持有人/受保人或其配偶、父母、子女完全/部分持有之公司 (Please provide (i) a copy of Business Registration Certificate or Certificate of Incorporation and (ii) a copy of latest Annual Return. For partially owned company, please also provide supporting document with consent from the directors (e.g. board minutes). 請提供(i)商業登記證或公司註冊證明書之副本及(ii)最新周年申報表之副本。如為部分持有之公司, 須同時提供取得董事會同意的證明文件 (如董事會議紀錄。))	
*Identity Card / Passport / Travel Document No. of Third Party Payor 第三者付款人的*身份證/護照/旅行證件號碼	Gender 性別 *Male 男 / Female 女	
Nationality of Third Party Payor 第三者付款人的國籍	Date of Birth of Third Party Payor 第三者付款人的出生日期	DD/MM/YYYY 日/月/年
Address & Contact No. of Third Party Payor 第三者付款人的地址及聯絡電話號碼		

Part 2 第二部分 Payment Amount & Method 繳款金額及方法		
1. We only accept HKD payment for HKD policy; HKD or USD payment for USD policy. The currency that we accept for RMB policy depends on the terms and conditions of specific product. 港元保單只接受以港元付款; 美元保單只接受以港元或美元付款。人民幣保單之付款貨幣受個別計劃之條款及細則所規限。 2. If payment was made by credit / debit card / telegraphic transfer / bank transfer and there is subsequently a refund, such refund will be directly credited to the credit card account holder / bank account holder / remitter (as the case may be). Any handling charge or exchange rate difference arising from such refund will be borne by credit / debit cardholder / bank account holder / remitter. 如以信用卡/借記卡/電匯/銀行轉賬繳款而其後發生退款, 該退款將直接退回予信用卡卡主/借記卡卡主/滙款人之賬戶內(視乎情況而定)。信用卡公司/發卡機構在收款及退款時徵收之手續費或使用不同匯率而產生之外匯差額將由信用卡/借記卡卡主/滙款人承擔。 3. If the third party payment is over HKD200,000 equivalent, a copy of the identity card / passport / travel document of the Third Party Payor must be submitted. 如第三者款項為超過 200,000 港元等值之金額, 第三者付款人必須遞交身份證/護照/旅行證件之副本。 4. If the third party payment is over HKD 500,000 equivalent, a copy of the relationship proof such as marriage certificate/birth certificate/household register must be submitted to verify the relationship between Third Party Payor and Proposer/Policyowner/Life Proposed/Life Assured. 如第三者款項為超過 500,000 港元等值之金額, 第三者付款人必須遞交關係證明文件如結婚證書/出世紙/內地戶口證明文件之副本以核實第三者付款人與投保人/保單持有人/受保人的關係。 5. The maximum amount of cash payment that is accepted at Cashier is HKD120,000/USD15,000 per payment installment per policy. 於繳費處以現金繳費, 每份保單每期繳費的交易金額上限為 120,000 港元/15,000 美元。		
Payment Amount made by the Third Party Payor 由第三者付款人繳付之金額	<input type="checkbox"/> HKD 港元 / <input type="checkbox"/> USD 美元 / <input type="checkbox"/> RMB 人民幣	Amount 金額
Payment Method 繳款方法		
<input type="checkbox"/> Cash 現金 <input type="checkbox"/> Cheque 支票 Cheque No.支票號碼 _____ Name of Bank 銀行名稱 _____		
<input type="checkbox"/> *VISA / Master Credit Card *VISA / 萬事達信用卡 <input type="checkbox"/> UnionPay Credit Card 銀聯信用卡 <input type="checkbox"/> UnionPay Debit Card 銀聯借記卡 <input type="checkbox"/> JCB Card	<input type="checkbox"/> EPS 易辦事 <input type="checkbox"/> Bank Transfer 銀行轉賬 (Only accept the banks which are designated by Prudential 只接受保誠指定之銀行) <input type="checkbox"/> Telegraphic Transfer (TT) /Local TT 電匯及本地滙款 <input type="checkbox"/> Others 其他: _____	*Card /Account No.卡/戶口號碼 _____ Name of Bank 銀行名稱 _____



Part 3 第三部分 Personal Information Collection Statement 收集個人資料聲明

Prudential Hong Kong Limited (referred to as "Company", "our", "we", or "us") take the privacy and protection of your personal information seriously. We collect personal information from you that is necessary for us to either provide you with the product or service you have requested or to comply with statutory or contractual requirements. We may collect personal information including, but not limited to, full name, address, contact details, contact details history, date of birth, gender, nationality, family members, beneficiaries, identity card copy and details, travel document information, health/medical records, credit information, product history, claims history, financial and medical information ("Personal Information") to provide you with the insurance or financial products or services. We may also collect Personal Information about you from third parties such as other insurance companies, agents, credit reference/reporting agencies, vendors, financial institutions, fraud prevention agencies, government agencies, medical personnel, courts or public record.

1. Purpose of Collection

We may use your Personal Information for the following purposes: (a) to process your application; (b) to administer and process insurance policies, insurance claims and medical, security and underwriting checks; (c) to process payment instructions; (d) to verify your eligibility for insurance, financial or wealth management products and services; (e) to design and provide you with insurance, financial and related products and services; (f) to communicate with you; (g) to comply with any regulatory or other legal requirements or other internal business requirements (whether imposed on us or any third parties in section 2 below); (h) to investigate and settle claims and detect and prevent fraud (whether or not relating to the policy issued in respect of this application); (i) to carry out checks using agencies including credit reference agencies, tracing companies or publicly available information; (j) to provide customer services; (k) to perform automated decision-making or profiling; (l) to perform a policy review or needs analysis; (m) to conduct research and statistical analysis (including use of new technologies); and (n) any other purpose directly relating to any of the above purposes. With your consent, we may also use your personal data to send you marketing communications, as described below.

Some of the purposes above are necessary to allow us to perform our contractual obligations to you and to enable us to comply with applicable laws and regulation. We may also use and share your Personal Information for the purposes described above to improve our products and services. Your Personal Information will be stored either for as long as you (or your joint policyholder) are our customer, or longer if required by law or as is otherwise necessary.

2. Classes of Transferees

We may disclose your Personal Information to the group of companies including the Company and those of other entities whose ultimate parent company is Prudential plc ("companies within the Prudential Group") and to our financial/health business partners. We may also disclose your Personal Information to third parties (within or outside Hong Kong) for the purposes outlined at Section 1 above, including but without limitation, to the following third parties: (a) insurance agents; (b) insurance brokers; (c) re-insurance companies; (d) claims investigation companies; (e) organisations that consolidate claims and underwriting information for the insurance industry, fraud prevention organisations, other insurance companies (whether directly or through fraud prevention organisations or other persons named in this paragraph) and databases or registers (and their operators) used by the insurance industry to analyse and check information provided against existing information; (f) third party service providers who provide administrative, telecommunications, computer, payment, printing, redemption or other services to us to enable us to operate our business (including without limitation insurers, lawyers, bankers, accountants, professional advisors, financial institutions and trustees); (g) industry associations and federations; (h) medical bill review companies; (i) your joint policy or investment holder; (j) researchers; (k) credit reference agencies; (l) debt collection agencies; (m) partnering financial institutions and partnerships; and (n) regulators and government agencies, law enforcement agencies and the courts. We may also disclose your Personal Information in connection with a transaction with another company which affects the control, governance, structure and/or management of all or a substantial part of our business, or if required to satisfy applicable legal or regulatory requirements. With your consent, we may also disclose your personal data to third parties to allow them to send you marketing communications, as described below.

3. Consequence of failing to provide Personal Information

Unless otherwise specified by us, it is mandatory for you to provide the Personal Information requested by us. If you do not provide such Personal Information, we may not be able to provide you the product or service that you've requested.

4. Access and Correction Rights

Under the Personal Data (Privacy) Ordinance (the "Ordinance"), you have the right to request access to and correction of any Personal Information that you provide to us. If want to exercise your rights, or if you require any other information, you can advise our Data Protection Officer at service@prudential.com.hk or using the details on "Contact Us" section of the Company website or our Privacy Notice.

If you move/moved to a European Union ("EU") jurisdiction, we may be required to provide you with further information, and you may have additional rights, under the EU General Data Protection Regulation. This information and these rights are set out in the Privacy Notice on our Company website.

We update our Privacy Notice from time to time. We encourage you to familiarise yourself with the Privacy Notice on our Company website. By completing and progressing with this form, you confirm that you have read and understood this PICS. The Privacy Notice is available on our Company website at <https://www.prudential.com.hk/scws/pages/en/privacy-policy/index.html>.



Part 3 第三部分 Personal Information Collection Statement 收集個人資料聲明

保誠保險有限公司（簡稱「本公司」或「我們」）認真對待閣下個人資料的私隱及保護。為使我們可以向閣下提供閣下要求的產品或服務，或為遵守法定及合約要求，我們會向閣下收集必要的個人資料。為向閣下提供保險或金融產品或服務，我們可能會向閣下收集個人資料，包括但不限於全名、地址、聯絡資料、過往聯絡資料、出生日期、性別、國籍、家庭成員、受益人、身分證副本及資料、旅遊證件資料、健康 / 醫療紀錄、信貸資料、過往產品紀錄、過往索償紀錄、財務及醫療資料（「個人資料」）。我們亦可能會從第三方，如其他保險公司、代理、信貸資料服務 / 報告機構、供應商、金融機構、防欺詐機構、政府機構、醫務人員、法院或公開紀錄，收集關於閣下的個人資料。

1. 收集資料之目的

我們可能會使用閣下的個人資料作下列目的：(a) 處理閣下的申請；(b) 管理和處理保單、保險索償、醫療、抵押和承保檢查；(c) 處理付款指示；(d) 核實閣下申請保險、金融或財富管理產品及服務的資格；(e) 設計及為閣下提供保險、金融及相關的產品和服務；(f) 與閣下進行通訊；(g) 遵守任何監管或其他法律規定或其他內部業務規定（不論是向我們或下述第 2 部分所列的任何第三方實施）；(h) 就索償進行調查及和解，以及偵查及防止欺詐（不論是否有關就本申請簽發的保單）；(i) 使用代理機構（包括信貸資料服務機構）、追蹤公司或公開可得資料以執行核實；(j) 提供客戶服務；(k) 執行自動決策或資料剖析；(l) 進行保單審查或需求分析；(m) 進行研究和統計分析（包括使用新科技）；及 (n) 與上述任何目的直接相關的任何其他目的。經閣下同意，我們亦可能會按照以下說明使用閣下的個人資料以向閣下發出促銷通訊。

為履行對閣下的合約責任及至使我們能夠遵守適用法律及法規，上述部分目的屬必要的。我們亦可能會為上述所列的目的使用及分享閣下的個人資料以改善我們的產品及服務。只要閣下（或閣下的聯名保單持有人）仍為我們的客戶，我們將一直保存閣下的個人資料，或如法律有所規定或因其他原因而為必要，我們則將其保存更長時間。

2. 被資料轉交者的類別

我們可能會向該公司集團，包括本公司以及其他母公司為英國保誠集團的實體（「保誠集團內的公司」），及我們的金融 / 健康業務夥伴，透露閣下的個人資料。為達到上述第一部分所列明之目的，我們亦可能還會向第三方（在香港境內或境外）透露閣下的個人資料，包括但不限於以下第三方：(a) 保險代理；(b) 保險經紀；(c) 再保險公司；(d) 索償調查公司；(e) 為保險業整合索償及承保資料的組織、防欺詐組織、其他保險公司（不論直接或透過防欺詐組織或本段指名的其他人士），及保險業用作分析及核實現有資料與及後提供的資料而使用的數據庫或登記冊（及其營運商）；(f) 提供行政、電訊、電腦、付款、印刷、贖回或其他服務以令我們的業務可以運作的第三方服務供應商（包括但不限於保險公司、律師、銀行家、會計師、專業顧問、金融機構及受託人）；(g) 行業協會及聯會；(h) 醫療賬單審查公司；(i) 閣下的聯名保單或投資持有人；(j) 研究人員；(k) 信貸資料服務機構；(l) 收賬代理；(m) 夥伴金融機構及合作夥伴；及 (n) 監管機構及政府機構、執法機構及法院。在有關影響到我們全部或重大部分業務的控制權、治理、結構及 / 或管理的與另一公司的交易時，或在必須符合適用的法律或監管要求下，我們亦可能會透露閣下的個人資料。經閣下同意，我們亦會向第三方透露閣下的個人資料以讓該等第三方向閣下發出促銷通訊（如下文所述）。

3. 未能提供個人資料的影響

除非我們另有規定，否則閣下必須提供我們要求的個人資料。若閣下未提供有關個人資料，我們可能無法為閣下提供所要求的產品或服務。

4. 查閱和更正的權利

根據《個人資料（私隱）條例》（「條例」），閣下有權要求查閱及更正任何閣下提供給我們的個人資料。閣下如欲行使閣下的權利，或如閣下需要任何其他資料，請發送電郵至 service@prudential.com.hk 或使用本公司網站或我們的私隱通知中「聯絡我們」部分所列的資料與我們的資料保護主任聯絡。

如閣下搬遷 / 已搬遷至歐洲聯盟（「歐盟」）司法管轄區，我們可能需要向閣下提供進一步資料，且閣下可能在歐盟《通用數據保障條例》下享有額外權利。此類資料及此等權利均載於本公司網站上的私隱通知中。

我們會不時更新我們的私隱通知，並建議閣下瀏覽本公司網站以了解該私隱通知。閣下填妥並繼續提交本表格，即表示閣下確認已閱讀並理解本收集個人資料聲明。該私隱通知可在本公司網站 [<https://www.prudential.com.hk/scws/pages/tc/privacy-policy/index.html>] 上查閱。



Part 4 第四部分 Declaration 聲明

I/We, the Proposer / Policyowner / Third Party Payor, hereby jointly and severally declare to Prudential that:

本人 / 吾等，作為投保人 / 保單持有人 / 第三者付款人，謹此共同及各別地向保誠作出以下聲明：

- the information given by me/us in this declaration form (including in particular, the relationship declared by Third Party Payor and Proposer / Policyholder / Life Proposed / Life Assured in Part 1) is true and accurate and can be relied upon by Prudential;
本人/吾等在本聲明書上提供之資料(尤其包括在第一部分中所聲明第三者付款人其與投保人 / 保單持有人 / 受保人之間的關係)為真實及準確及可被保誠信賴;
- I/we have read the Personal Information Collection Statement in Part 3 and agree to its terms fully.
本人/吾等已閱讀第三部分的收集個人資料聲明並對其內容完全同意;

The Third Party Payor further declares that in making the payment for the Proposal/Policy mentioned in Part 1 above, such payment is made for the benefit of the Proposer / Policyowner / Life Proposed / Life Assured out of the Third Party Payor's own free will.

第三者付款人同時亦聲明，在為上述第一部分內提及的投保書 / 保單作出付款時，該筆付款是為投保人 / 保單持有人 / 受保人之利益而作出並是出於第三者付款人的個人意願。

In any circumstances, a person who is not a party to the above policy (including but not limited to the Life Assured or the Beneficiary) has no right to enforce any of the terms of the above policy.

任何不是上述保單某一方的人士或實體(包括但不限於受保人或受益人)，在任何情況下均不能強制執行上述保單的任何條款。

Part 5 第五部分 Signature 簽署

If the signatory is a Company / Partnership / Sole Proprietorship, its authorized signatories should sign and chop.
如簽署方為公司 / 合夥 / 獨資經營持有，須由公司授權人員簽署及蓋章。

Day 日 / /
Month 月 Year 年

Signature of Proposer / Policyowner
投保人 / 保單持有人簽署
(Signature of Policyowner must be
consistent with that in our record)
(保單持有人的簽署必須與本公司的記錄
相符)

Signature of Third Party Payor
第三者付款人簽署
(It must be consistent with that in the Third
Party Payor's bank account / credit card / debit
card record)
(須與第三者付款人的銀行戶口或相關信用卡/借
記卡上的簽署樣式相符)

If the Proposer / Policyowner uses signature chop or fingerprint, two witnesses are required. The witness must be an individual third party aged 18 or above. The personal particulars of the witness(es) will only be used for the purpose of verification and confirmation of the identity(ies) of the signatory(ies) of this form. 若投保人 / 保單持有人以圖章蓋印或指模簽署，必須有兩位見證人。見證人必須為年滿 18 歲或以上的第三者。見證人之個人資料只會用於處理本申請及確認此表格簽署人的身份之用。

Signature of Witness
見證人簽署

Name & Identity Document
Number of Witness
見證人姓名及身份證明文件號碼

Signature of Witness
見證人簽署

Name & Identity Document
Number of Witness
見證人姓名及身份證明文件號
碼

Please DO NOT sign on BLANK form. 請勿在空白表格上簽署。

