

推廣編號
PROMOTION CODE

CP2102

推廣優惠¹ PROMOTION OFFER¹

於推廣期內，若您為指定機構的員工（包括僱員、合約員工、外判員工）、退休員工、會員，或其親屬或朋友（統稱「合資格客戶」）並成功投保香港年金計劃，所投保的合資格保單將可獲享1%保費折扣。

During the Promotion Period, if you are a staff (including employee, contract staff and secondee), a retiree or a member of the Designated Organisation or his/her Family Member or Friend (“Eligible Customer”) and successfully apply for the HKMC Annuity Plan, the eligible policy will be entitled to a 1% premium discount.

推廣優惠
Promotion Offer: 「指定機構推廣優惠」(「本優惠」)
“Promotion Campaign for Designated Organisation” (“Offer”)

推廣期
Promotion Period: 由即日起至另行通知(「推廣期」)
From now till further notice (“Promotion Period”)

產品
Product: 香港年金計劃(「年金計劃」)
HKMC Annuity Plan (the “Plan”)

注意事項

Important Notes:

- 填寫此「指定機構推廣優惠」參加表格(「參加表格」)前，請先細閱第三部分所列之條款及細則。
Please read the terms and conditions set out in Part III before completing this “Promotion Campaign for Designated Organisation” Enrolment Form (“**Enrolment Form**”).
- 有關在本參加表格所使用的詞彙的定義，請參閱第三部分條款及細則的第2項。
Please refer to clause 2 of Part III of the Terms and Conditions for the definitions of the capitalized terms in this **Enrolment Form**.
- 申請人必須填妥此參加表格，並連同年金計劃投保申請書一併遞交給香港年金有限公司(「香港年金公司」)，並透過相關代理銀行(如適合)轉介參與此推廣。本參加表格將構成年金計劃投保申請書的一部分。
Applicant is required to complete and submit to the HKMC Annuity Limited (“**HKMCA**”) the **Enrolment Form** together with the Plan application form and referred by the relevant Agent Bank (if applicable) to participate in this promotion. This **Enrolment Form** will form part of the Plan application form.
- 如欲了解更多關於年金計劃的產品特性和風險，請直接聯絡香港年金公司「指定機構推廣優惠」熱線(852) 2512 5058。
Please call HKMCA Promotion Campaign for Designated Organisation Hotline (852) 2512 5058 directly if you wish to know more about the product characteristics and risks of the Plan.

¹ 需受本優惠之條款及細則所約束。

¹ Subject to the terms and conditions of the Offer.



CAMPFORM

第一部分 — 申請者資料**PART I — INFORMATION OF APPLICANT****指定機構名稱****Name of Designated Organisation**

英文姓名 (須與香港身份證相同)

English Name (As shown on Hong Kong Identity Card)

中文姓名 (須與香港身份證相同)

Chinese Name (As shown on Hong Kong Identity Card)

申請者類別 (請在適當空格加上「✓」號)

Applicant Category (Please tick as appropriate)
 申請人為指定機構的員工 (僱員/合約員工/外判員工)* (*請刪除不適用) 或會員

 Applicant is a staff (employee/contract staff/seconded)*
 (*cross out if not applicable) or member of the Designated Organisation

 申請人為指定機構員工或會員的親屬 (請在下面提供親屬關係及填上員工或會員資料)

Applicant is a Family Member of the staff or member of the Designated Organisation (Please provide the relationship and fill in the staff or member information below)

親屬關係**Relationship of Family Member Information**
 配偶
Spouse

 父母或配偶之父母
Parents and in-laws

 祖父母或配偶之祖父母
Grandparents and in-laws

 兄弟姊妹及其配偶; 或配偶之兄弟姊妹
Siblings and in-laws

 申請人為指定機構的退休員工, 已於 _____ 年退休 (退休年份)

Applicant is a retiree of the Designated Organisation, and retired in _____ (year of retirement)

 申請人為指定機構退休員工的親屬 (請在下面提供親屬關係及填上退休員工資料)

Applicant is a Family Member of the retiree of the Designated Organisation (Please provide the relationship and fill in the retiree information below)

員工、退休員工或會員資料**Staff, Retiree or Member Information**
 英文姓名 (須與香港身份證相同)
 English Name (As shown on HKID Card)

 中文姓名 (須與香港身份證相同)
 Chinese Name (As shown on HKID Card)

 員工或會員編號 (如適用)
 Staff Number or Membership Number (if applicable)

 申請人為指定機構員工/退休員工/會員的朋友* (*請刪除不適用) (請在下面填上轉介人資料)

Applicant is a Friend of the Staff/Retiree/Member * (*cross out if not applicable) of the Designated Organisation (Please fill in the information below).

指定機構推薦人^的中文姓名或英文姓名 (須與香港身份證相同)
English Name or Chinese Name of the referrer^ of the Designated Organisation (As shown on HKID Card)

 ^推薦人即指定機構的員工、退休員工或會員
 ^Referrer refers to Staff, Retiree or Member of the Designated Organisation

<p>投保申請書編號 Application Number</p> <p>(與本參加表格一併遞交的投保申請書編號) (Application Number for the application form submitted together with this Enrolment Form)</p> <p>(請於申請會面時填寫) (To be filled in at the time of application meeting)</p>	
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補充資料 (如有)
SUPPLEMENTARY INFORMATION (IF ANY)

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第二部分 — 聲明及簽署

PART II — DECLARATION AND SIGNATURE

本人在簽署本**參加表格**前，已細閱並明白本優惠之條款及細則（詳見本**參加表格**第三部分）及填寫本**參加表格**的注意事項。本人同意受本優惠的條款及細則約束。本人聲明所提供的資料均屬真實、正確及完整，既不誤導也不欺詐。本人知悉香港年金公司會依據所提供的資料決定本人是否符合本優惠的資格。此保單申請需由香港年金公司批核。本人明白如果發現本人所提供的資料不真實、不正確、具有誤導性或欺詐性，本人的申請將會被取消（或已簽發的保單將會被撤消）及本人需對就因此而致使香港年金公司蒙受的任何損失、費用或損害負責。

I have read and understood the Terms and Conditions of this Offer (please see Part III of this **Enrolment Form**) and the Important Notes of this **Enrolment Form** before signing this **Enrolment Form**. I agree to be bound by them. I declare that the information provided is true, accurate, complete, neither misleading nor fraudulent. I acknowledge that the HKMCA will rely on the information provided for determining my eligibility of the Offer. The application for the policy will be subject to the approval of the HKMCA. I understand that my application will be cancelled (or policy issued will be revoked) if the information provided is found to be untrue, inaccurate, misleading or fraudulent and I will be liable for any loss, cost or damage to the HKMCA resulting therefrom.

本人確認已獲得推薦人同意提供其姓名、員工或會員編號（如適用）以申請參加本優惠（如適用）。

I declare that I have obtained prior consent from the referrer for disclosing his/her name, staff number or membership number (if applicable) to apply for the enrolment of this Offer (if applicable).

本人特此授權香港年金公司從指定機構及／或其相關員工、退休員工或會員獲取本人的個人資料，以使在香港年金公司認為適當的情況下核實本人符合本優惠之資格。

I hereby authorise the HKMCA to obtain my personal information from the Designated Organisation and/or from its relevant employee, retiree or member to verify my eligibility of this Offer as the HKMCA deems appropriate.

當本人在遞交本**參加表格**時，已同時簽署年金計劃投保申請書，並已閱讀及明白香港按揭證券有限公司（「**按揭證券公司**」）和其附屬公司有關《個人資料（私隱）條例》的收集個人資料聲明內容（詳見年金計劃投保申請書第九部分）。倘若本人不接受香港按揭證券公司使用本人的個人資料作直接促銷之用，本人可透過填寫年金計劃投保申請書相關部分行使拒絕接受直接促銷之權利。

When I submit this **Enrolment Form**, I have also signed the Plan application form, and I have read and understood the contents of the personal information collection statement of The Hong Kong Mortgage Corporation Limited ("**HKMC**") and its subsidiaries in relation to the Personal Data (Privacy) Ordinance (please see Part IX of the Plan application form for details). I understand that if I do not want my personal data to be used for direct marketing purpose, I can exercise my direct marketing opt-out right by completing the relevant part in the Plan application form.

SIGN 

申請人簽署

Applicant's Signature

日 DD / 月 MM / 年 YYYY

SIGN 

見證人簽署（如適用）*

Signature of Witness (if applicable)*

見證人姓名（如適用）*

Name of Witness (if applicable)*

日 DD / 月 MM / 年 YYYY

*請注意

PLEASE NOTE

如申請人為(1) 81歲或以上；(2)以圖章蓋印或指紋作簽署；(3)不能閱讀及理解中英文；或(4)患有視障，必須攜同一名見證人進行申請。簽署此**參加表格**之見證人必須與簽署年金計劃投保申請書之見證人相同。

For any applicant who is (1) 81 years old or above; (2) using chop or fingerprint for signature; (3) unable to read and understand both Chinese and English; or (4) visually impaired must bring along a witness for this application process. The witness who signs on this **Enrolment Form** must be the same witness signing on the Plan application form.

第三部分 — 條款及細則
PART III — TERMS & CONDITIONS

1. 本優惠由香港年金公司提供，並受下列條款及細則約束。
This Offer is offered by the HKMCA, subject to the following terms and conditions.
2. 定義
Definitions
除非另有定義，下述詞彙具有以下的含義：
Unless otherwise defined, the following terms should have the following meanings:
「代理銀行」指合資格獲取本優惠的香港年金公司的委任代理銀行。
“Agent Bank” means the bank which is an appointed agent of the HKMCA eligible for this Offer.
「指定機構」指由香港年金公司指定合資格獲取本優惠的機構，包括代理銀行。
“Designated Organisation” means the organization eligible for this Offer as designated by the HKMCA, including the Agent Bank.
「親屬」指該指定機構員工、退休員工或會員的：“Family Member” means:
 1. 配偶；
 2. 父母或配偶之父母；
 3. 祖父母或配偶之祖父母；或
 4. 兄弟姊妹及其配偶、或配偶之兄弟姊妹。
1. Spouse;
2. Parents and in-laws;
3. Grandparents and in-laws; or
4. Siblings and in-laws of a staff, a retiree or a member of the Designated Organisation.
「合資格客戶」指該指定機構的員工（包括僱員、合約員工、外判員工）、退休員工、會員，或其親屬或朋友。
“Eligible Customer” means a staff (including employee, contract staff and secondee), a retiree or a member of the Designated Organisation or his/her Family Member or Friend.
「朋友」指該指定機構的員工、退休員工或會員的朋友。
“Friend” means a friend of a staff, a retiree or a member of the Designated Organisation.
3. 於推廣期間，如合資格客戶投保年金計劃，成功投保後，在符合以下條款及細則的前提下，香港年金公司將就簽發給合資格客戶的年金計劃應支付的整付保費金額提供1%折扣優惠：
 - (a) 合資格客戶**必須**在推廣期內聯絡香港年金公司預約安排年金計劃銷售會面。代理銀行的合資格客戶**必須**由所屬代理銀行以其員工、退休員工、親屬或朋友的身份作出轉介；
 - (b) 合資格客戶**必須**於本參加表格簽署日起計一個月內連同填妥的年金計劃投保申請書遞交予香港年金公司；及
 - (c) 成功投保的合資格客戶**必須**在投保簽署日後10天內支付全數折實保費。

During the Promotion Period, if any Eligible Customer applies for the Plan, upon successful application, the HKMCA will offer a discount of 1% on the amount of single premium payable in relation to the Plan to be issued to the Eligible Customer provided that the following terms and conditions are satisfied:

 - (a) The Eligible Customers **must** contact the HKMCA during the Promotion Period to make a sales appointment for the Plan. Eligible Customers of an Agent Bank shall be referred by the respective Agent Bank he/she belongs to as a staff, a retiree, a Family Member or a Friend;
 - (b) The Eligible Customer **must** complete and submit this **Enrolment Form** together with the Plan application form to the HKMCA within 1 month from the signing date of this **Enrolment Form**; and
 - (c) The Eligible Customer who has successfully applied for the Plan **must** pay in full the discounted premium within 10 calendar days from the application signing date.
4. 申請人需要於銷售會面時提供相關員工、退休員工或會員的有效員工證、退休或會員證明的副本以作核實用途。香港年金公司保留權利要求申請人及／或指定機構及／或其相關員工、退休員工或會員提供有關員工、退休員工或會員於指定機構的工作、退休或會員身份證明，或作為親屬或朋友而符合本優惠的資格證明，或其他香港年金公司可接受的證明方法。
Applicant has to provide a copy of the relevant staff's, retiree's or member's valid staff card, retirement or membership proof during the sales meeting for verification purpose. The HKMCA reserves the right to request the applicant and/or the Designated Organisation and/or its relevant staff, retiree or member to provide relevant evidence of the staff, retiree or member status of the Designated Organisation or proof of eligibility as a Family Member or a Friend, or other methods of proof acceptable to the HKMCA.

5. 不符合本優惠資格之申請人

- (a) 如申請人不符合本優惠的資格，香港年金公司將採用新保費金額**作為由保單簽發日起生效的整付保費（此金額不得少於港幣50,000元）。該申請人的保單之保證每月年金金額、保證現金價值、一筆過身故賠償價值及特別款項提取價值（請參閱年金計劃之產品小冊子）將根據新保費金額重新釐定。如香港年金公司已支付予該申請人的保證每月年金金額多於根據新保費金額釐定之應支付金額，差額將由隨後的保證每月年金金額中扣除，直至香港年金公司全數收回多付的金額。
- (b) 倘若新保費金額少於年金計劃的最低保費金額要求，即港幣50,000元，該申請人須支付差額以符合年金計劃的最低保費金額要求；如該申請人未能支付差額，其投保申請將會被取消。

**「新保費金額」指在本優惠適用的情況下申請人本應支付的保費金額。

Applicant not eligible for the Offer

- (a) If the applicant is not eligible for the Offer, the HKMCA will adopt the New Premium Amount** as the amount of the single premium (provided that the amount shall be no less than HK\$50,000) under the policy that is being applied for as from the issuance of the policy. The Guaranteed Monthly Annuity Payment, Guaranteed Cash Value, Lump Sum Death Benefit Value and Special Withdrawal Value (please refer to the product brochure of the Plan) of the applicant's policy will be recalculated based on the New Premium Amount. Any Guaranteed Monthly Annuity Payment(s) that may have been paid to the applicant in excess of the payable amount based on the New Premium Amount shall be deducted from the subsequent Guaranteed Monthly Annuity Payment(s) payable to him/her until the excess shall have been fully recovered by the HKMCA.
- (b) If the New Premium Amount is below the Plan's minimum premium requirement of HK\$50,000, the applicant will be required to pay the shortfall in order to meet the Plan's minimum premium requirement; failure to pay the shortfall will result in the application being cancelled.

** "New Premium Amount" is the premium amount that would have been payable had the discount been applicable.

6. 如申請人在申請階段內撤回投保申請或在冷靜期內取消保單，香港年金公司只會退還申請人實際已繳付的折實保費金額並扣除任何已派發的保證每月年金金額（請參閱年金計劃之產品小冊子）及任何已提取之金額。

If the applicant withdraws the application during the application stage or cancels the policy within the cooling-off period, the HKMCA will only refund the discounted premium that was actually paid less any Guaranteed Monthly Annuity Payment(s) (please refer to the product brochure of the Plan) that has already been made and any withdrawals.

7. 除香港年金公司另有規定外，就申請人所購買的每份保單而言，本優惠不得與香港年金公司提供的其他推廣或折扣一併使用。

Unless otherwise specified by the HKMCA, in respect of each policy taken out by the applicant, the Offer may not be applied in conjunction with any other promotion or discount offered by the HKMCA.

8. 在任何情況下，本優惠均不可轉讓、交換或兌換現金。

Under no circumstances is this Offer transferrable, exchangeable or redeemable for cash.

9. 任何申請人提供的不正確、錯誤或虛假資料及／或偽造文件即屬違反優惠的條款及細則。香港年金公司保留拒絕或取消任何保單申請的權利並無需作出另行通知。

Any incorrect, false or fake information and/or forged documents provided by the applicant will constitute a breach of the terms and conditions of this Offer. The HKMCA reserves the right to reject or cancel any policy application without further notice.

10. 每份保單申請及本優惠須經香港年金公司批核。香港年金公司保留就有關任何申請作出批核及撤銷任何本優惠之決定的權利。

Each application for the policy and this Offer is subject to the approval of the HKMCA. The HKMCA reserves the right to make any such determination with respect to the approval of any application and to revoke any discount given as it sees fit.

第三部分 — 條款及細則 (續)
PART III — TERMS & CONDITIONS (CON'T)

11. 香港年金公司保留權利隨時更改、暫停或終止本優惠及／或修訂或修改本優惠的全部或部分條款及細則，而無需作出任何事先通知。
The HKMCA reserves the right to vary, suspend or discontinue this Offer and/or amend or alter the terms and conditions (in whole or in part) of this Offer at any time without any prior notice.
12. 香港年金公司有權就本優惠所產生的任何爭議作出最終決定。
In the event of any dispute that may arise from this Offer, the decision of the HKMCA shall be final and conclusive.

由授權中介人填寫 To be completed by Authorised Intermediary

授權中介人姓名 Name of Authorised Intermediary	授權中介人簽名 Signature of Authorised Intermediary	香港年金有限公司授權 中介人保險牌照號碼 HKMC Annuity Limited Authorised Intermediary's Insurance License Number	日期 Date