

保險中介人 INSURANCE INTERMEDIARY			
姓名 Name	經紀/職員編號 Agent/Bank Staff Code	區域/分行編號 District/Branch Code	聯絡號碼 Contact Tel. No.
甲部- 由索償人填寫 PART I - TO BE COMPLETED BY THE CLAIMANT			
保單編號 Policy No.	已故受保人姓名 Name of the Deceased	身份證號碼 ID No.	最後職業 Last Occupation
死亡日期及地點 Date and Place of Death	死亡原因 Cause of Death	曾否或將舉行解剖驗屍/法醫官調查死因? Any post-mortem examination / coroner's inquest done or pending? <input type="checkbox"/> 是 (如有報告, 請附上) Yes (Please attach report, if any) <input type="checkbox"/> 否 No	
1. 若因意外導致死亡, 請詳述意外詳情 If death due to <u>Accident</u> , please describe the accident details	日期 Date _____ (年/月/日 YY/MM/DD) 地點 Place _____ 意外詳情 Accident Details _____		
2. 若因疾病導致死亡, 請詳述最後疾病之詳情 If death due to <u>Illness</u> , please describe the accident details	病徵首次出現日期 Date symptoms first appeared _____ (年/月/日 YY/MM/DD) 病徵詳情 Symptoms Details _____ 初診日期 First Consultation Date _____ (年/月/日 YY/MM/DD) 醫院/醫生名稱及地址 Name and address of the hospital/physician _____ 其他曾應診最後疾病的醫院/醫生資料 Other hospital/physicians consulted for the last illness 求診日期 Consultation Date(s) _____ (年/月/日 YY/MM/DD) 醫院/醫生名稱及地址 Names and addresses of the hospitals/physicians _____		
3. 過去五年內曾為死者治病之各醫院/醫生資料 Information of all hospitals/physicians who attended the deceased in the past 5 years	醫院/醫生姓名及地址 Name of Physician & Address	診治日期(年/月/日) Consultation Date(YY/MM/DD)	疾病/診斷 Illness/ Diagnosis
4. 其他保險保障資料 Insurance coverage with other companies	公司名稱 Name of Company	保單號碼 Policy No	投保額(貨幣) Amount of Assurance(Currency)
5. 賠付方式 Settlement Option	賠償貨幣 Currency Option 賠償方法 Payment Method <input type="checkbox"/> 支票領取 Cheque to Collect 只適用於港幣 / 人民幣 / 美元 Only HKD / CNY / USD are applicable ▶ 於分行(編號) at Branch (Code) 銀行經辦/編號 Bank Rep / Code	□ 港幣 HKD <input type="checkbox"/> 保單貨幣 Policy Currency	▶ 於客戶服務中心 at Customer Service Center <input type="checkbox"/> 中環 Central <input type="checkbox"/> 尖沙咀 Tsim Sha Tsui
	<input type="checkbox"/> 自動轉賬 Autopay 只接受受益人單獨持有之中國銀行(香港)戶口 Must be a BOCHK account solely owned by the Beneficiary 戶口持有人姓名 Account Holder Name _____ 請遞交相關的戶口證明 Please submit account proof _____		
	注意事項: 閣下須負責確保提供的自動轉賬銀行戶口號碼及資料為正確及有效。中銀人壽不會就閣下提供不正確/無效的自動轉賬銀行戶口號碼或資料而蒙受之損失承擔任何法律責任。如理賠金額未能成功轉至指定之銀行戶口, 賠償將以支票形式支付。 Remarks: It is your responsibility to ensure that the autopay account number and information is accurate and valid. BOC Life shall not be liable for any loss suffered by you arising from your provision of incorrect/ invalid autopay account number and information. Claim payment will be made by cheque in the event of unsuccessful direct credit to designated bank account.		
索償文件清單 CLAIMS DOCUMENT CHECKLIST			
文件類別 Document Type			身故保障 Death Benefit
理賠申請表甲及乙部份(保證核保豁免遞交乙部份) Claim Form Part I & Part II (Guarantee Issued to submit Part II)			✓
死亡證明書正本 Original Death Certificate			✓
受保人及受益人的身份證明文件正本 Original Identity proof of the Insured and Beneficiary			✓
受保人與受益人的關係證明文件副本 Copy of Relationship proof between the Insured and Beneficiary			✓
稅務居民身份自我證明表格(受益人為遺產管理人除外) Self-Certification Form for Tax Residency (Excluded if beneficiary is Administrator of Estate)			✓
死亡公證書正本 Original Notarial Death Certificate			*
入境處發出之身證註銷證明副本 Copy of Identity Card Cancellation issued by Immigration Department			*
驗屍報告/警察報告/交通意外報告/口供紙副本 Copy of Post-Mortem/Police Report/Traffic Accident Report/Oral Statement			*
✓ 基本文件 Required Documents * 附加文件 Optional Documents 重要提示 Important Notes <ol style="list-style-type: none"> 請確保申請表甲及乙部完全填寫及提交所需索償文件, 以免延後索償進程。 Please ensure Claim Form Part I & Part II are fully completed and all required claim documents are submitted to avoid unnecessary delay in claim process. 索償人有可能就個別情況要求遞交額外資料以便處理索償申請。 Claimant may be requested to provide additional information in certain circumstances to process the claim. 			

索償人/受益人資料 - 個人客戶 Claimant / Beneficiary's information - Individual Customer

索償人/受益人姓名 Name of the Claimant / Beneficiary	身份證號碼 ID No.	國籍(國家/地區) Nationality (Country/Region)
住宅地址 Residential Address 室 Flat/Room _____ 樓 Floor _____ 座 Block _____ 大廈/屋苑名稱 Building/Estate _____ 街道名稱 No. & Name of Street/Road _____ 分區 District _____ 香港 / 九龍 / 新界* 國家/地區 Country/Region _____		電話號碼 (國家/區域編碼 - 地區編碼 - 電話號碼) Telephone No. (Country / Region code - Area code - Tel no.) 手提電話號碼 Mobile Phone No. : _____ - _____ - _____ 住宅電話號碼 Residence Tel. No. : _____ - _____ - _____ 辦事處電話號碼 Office Tel No. : _____ - _____ - _____
通訊地址及永久地址 (若與住宅地址不同, 請填寫此欄。) Mailing Address & Permanent Address (If different from the Residential Address, please complete this section.) <input type="checkbox"/> 通訊地址 Mailing Address _____ <input type="checkbox"/> 永久地址 Permanent Address _____		

* 將不適用者刪除 Delete as appropriate

索償人/受益人資料 - 公司客戶 Claimant / Beneficiary's information - Company Customer

#如索償人/受益人為獨資經營者, 獨資東主須同時填寫「索償人/受益人資料 - 個人客戶」部分及遞交「稅務居民身份自我證明表格 - 個人」
#For Claimant/Beneficiary being a sole proprietor, please also complete the "Claimant / Beneficiary's information - Individual Customer" and submit "Self-Certification Form for Tax Residency-individual"

公司名稱 Name of the company	商業登記證/公司註冊證號碼 * Business Registration/ Incorporation No.	註冊國家/地區 Country/Region of Incorporation
註冊辦事處地址 Incorporation Address 室 Flat/Room _____ 樓 Floor _____ 座 Block _____ 大廈名稱 Building _____ 街道名稱 No. & Name of Street/Road _____ 分區 District _____ 香港 / 九龍 / 新界* 國家/地區 Country/Region _____	電話號碼 (國家/區域編碼 - 地區編碼 - 電話號碼) Telephone No. (Country / Region code - Area code - Tel no.) 辦事處電話號碼 Office Tel. No. : _____ - _____ - _____ 手提電話號碼 Mobile Phone No. : _____ - _____ - _____ 其他 Other : _____ - _____ - _____	
營業地址及通訊地址 (若與註冊辦事處地址不同, 請填寫此欄。) Business Address & Mailing Address (If different from the Incorporation Address, please complete this section.) <input type="checkbox"/> 營業地址 Business Address _____ <input type="checkbox"/> 通訊地址 Mailing Address _____		

* 將不適用者刪除 Delete as appropriate

聲明及授權 DECLARATION & AUTHORIZATION

本人 _____, 別名 _____, 前名 _____, 香港身份證號碼 _____
(索償人 / 受益人姓名) (索償人 / 受益人別名) (索償人 / 受益人曾使用的姓名) (號碼)

【乃死者 _____, 別名 _____, 前名 _____, 香港身份證號碼 _____ 之 _____】
(死者姓名) (死者別名) (死者曾使用的姓名) (號碼) (關係)

現聲明本人有權申請成為死者的遺產代理人及可作為代表所有有權申請承辦死者的遺產的人士。本人已閱讀及完全明白載於本文件的個人資料收集聲明。本人同意本人及死者的個人資料可用作該聲明第 7 段所述之用途及貴公司可把該等個人資料提供給該聲明第 8 段所述各方作上述用途。本人謹此同意及授權任何僱主、註冊西醫、醫院、診所、保險公司、銀行、政府機構或其他機構、組織或人士, 凡知道或持有任何有關死者醫事或其他資料之紀錄者, 均可將該等資料提供給中銀集團人壽保險有限公司或其指定的代表人士。本授權及同意書的影印本與正本均有同等效力。本人謹此同意及授權貴公司, 從原可支付給本人之保險金額中(如有), 扣除未繳保費(如有)及貴公司代保險業監管局按相關規定收取的相應徵費。

I, _____, alias _____, former name _____ of HKID no. _____
(name of claimant / beneficiary) (alias of claimant / beneficiary) (former name of claimant / beneficiary used) (ID number)

[the _____ of the Deceased _____, alias _____, former name _____ of HKID no. _____]
(relationship) (name of the deceased) (alias of the deceased) (former name of deceased used) (ID number)

am entitled to be the personal representative of the Deceased or I can act for and on behalf of all persons who may be entitled to apply for the administration of the Deceased's estate. I have read and fully understand the Personal Information Collection Statement contained in this document. I agree that the personal data of myself and the Deceased may be used for the purposes set out in paragraph 7 of that Statement and the Company may provide the personal data to the parties set out in paragraph 8 of that Statement for the aforementioned purposes. I hereby authorize any employer, physician, hospital, clinic, insurance company, bank, government authorities or organization or person that has any records or knowledge of the Deceased to disclose to BOC Group Life Assurance Company Limited or its representatives any and all information with respect to the Deceased's health, medical history, hospitalization, advice, treatment, disease, investigatory result, employment record, accident report or statement. A photocopy of this declaration and authorization shall be considered as effective and valid as the original.

I hereby agree and authorize the Company to deduct unpaid premium (if any) and corresponding levy to be collected by the Company on behalf of the Insurance Authority according to relevant requirements, from the policy proceeds payable to me (if any).

索償人/受益人簽署 Signature of Claimant / Beneficiary

姓名 Name in Block Letter

身份證號碼 ID No.

簽署日期 Date

請參閱下頁的個人資料收集聲明 Please read the Personal Information Collection Statement on next page

個人資料收集聲明

在中銀集團人壽保險有限公司（“中銀人壽”），保護我們客戶個人資料對我們很重要。作為一個提供保險產品及服務的機構，收集及運用客戶個人資料是我們日常商業運作的基本工作。

如客戶希望了解中銀人壽的私隱政策聲明的詳情，歡迎透過以下網址 <http://www.boclife.com.hk/tc/privacy-policy.html> 閱讀有關文件。

1. 本聲明載中銀集團人壽保險有限公司（下稱「本公司」）有關其資料當事人（見以下定義）的資料政策。

2. 就本聲明而言，《本集團》指本公司及其控股公司、分行、附屬公司、代表辦事處及附屬成員，及其中任何一方，不論其所在地。附屬成員包括本公司的控股公司之分行、附屬公司、代表辦事處及附屬成員，不論其所在地。

3. 「資料當事人」一詞，不論於本聲明何處提及，包括以下為個人的類別：

(a) 本公司提供的保險及相關服務的申請人或客戶/用戶，包括保單權益人、索償人、受益人、受保人及其他有關人士及其被授權人；

(b) 任何公司申請人及客戶/用戶的董事、股東、高級職員及經理；及

(c) 本公司的供應商、承建商、服務供應商及其合規的經理。

為免疑問，「資料當事人」不包括任何法人團體。本聲明的內容適用於所有資料當事人，並構成其與本公司不時訂立或可能訂立的任何合約及/或保單的一部分。若本聲明與有關合約及/或保單存在任何差異或分歧，就有關保護資料當事人的個人資料而言，概以本聲明為準。本聲明並不限制資料當事人在個人資料（私隱）條例（香港法例第48章）（「條例」）及/或其他適用之法律（包括香港特別行政區境內或境外之法律）下之權利。

4. 資料當事人在建立、延續保險業務及行政事宜及/或有關的產品及服務、處理有關本公司簽發的保單的索償，及/或處理任何和所有其他資料當事人的要求、查詢或投訴，及/或為遵守在香港特別行政區境內或境外的監管或其他機關頒佈的任何法律、發出的指引或要求（包括但不限於根據香港特別行政區與美國之間的跨政府協議（「跨政府協議」）、香港特別行政區與美國在2014年3月25日簽署的《稅務資訊交換協議》執行《海外賬戶稅收合規法案》，以及經濟合作暨發展組織作出的規定，包括關於其為履行其共同報告標的主管機關協商的監管機制）時，資料當事人需要不時（包括通過人工智慧驅動的方面）向本公司提供有關的個人資料。

5. 若未能向本公司提供足夠資料，可能會由於資料當事人不時導致本公司無法評估處理你的申請及/或提供保險及相關服務和產品。若你拒絕給予上述明確的同意，本公司也可能需要向適用的監管機構簽保單項下的價值和付款金額；在特定的情況下，若你拒絕給予明確的同意，本公司可能保單項下的部分或所有利益；或終止保單。

6. 本公司會不時從各方收集或接收有關資料當事人的資料。該等資料包括但不限於在資料當事人與本公司或本集團成員延續正常業務往來期間，例如，當資料當事人簽發支票、存款或透過本公司或本集團成員發出的或提供的信用卡進行交易或在一般情況下以口頭或書面形式與本公司溝通時，從資料當事人所收到的資料。資料亦可能與本公司或本集團的關係性質有所不同，其中包括以下用途：

(a) 處理、評估及/或批核有關保險產品及服務的申請、調查及諮詢申索、偵測和防止欺詐行為（無論是否與就其申請而發出的保單有關）、及有關該等產品及服務的增添、更改、變更、取消、續期及/或復效的申請；

(b) 管理由本公司及/或本集團簽發的保單；

(c) 研究及/或設計供客戶使用的保險（金融）產品及/或服務；

(d) 與任何由本公司或本集團提供的產品及/或服務相關，而由你提出或對你作出的索償，或以其他形式涉及你的索償有關的用途，包括但不限於作出、辯護、分析、調查、處理、評估、釐定、結清或回應該等索償；

(e) 在適當時機進行身份及/或信貨檢查及進行資料配對過程；

(f) 為符合根據上述適用於本公司及/或期望本公司及/或本集團遵循從有關披露及使用資料之責任、規定或安排：

① 在香港特別行政區境內或境外之已存在、現有或將來對其具約束力或適用於其的任何法律；

② 在香港特別行政區境內或境外之已存在、現有或將來由任何法定、監管、政府、稅務、執法或其他機構，或由金融服務提供者之自律監管或行業團體或組織所發出或提供之任何指引或指導；

③ 本公司及/或本集團因其金融、商業、營業或其他利益或活動處於或關連於相關本地或海外的法定、監管、政府、稅務、執法或其他機構或金融服務提供者之自律監管或行業團體或組織之司法管轄區而須承擔或獲施加與本地或海外之法定、監管、政府、稅務、執法或其他機構或金融仲介人、或金融服務提供者之自律監管或行業團體或組織之間的現有或將來之任何合約承諾或其他承諾及/或本公司及/或本集團遵守適用稅務法律的義務，包括但不限於《海外賬戶稅收合規法案》和跨政府協議；

(g) 處理（包括但不限於調查、分析、核保及裁定）有關本公司簽發的保單的索償；

(h) 為推廣服務、產品及其他標的（詳見下述第11段）；

(i) 提供客戶服務（包括但不限於處理查詢及投訴）及有關活動：

① 供本公司及本集團作為諮詢及諮詢研究用途；

② 釐定本公司欠款人或你拖欠本公司的任何款項的額度，及強制執行你應向本公司履行之責任，包括但不限於向你或任何已為你的債務向本集團提供任何擔保或承諾的人士追欠款；

③ 為符合根據任何本集團計劃下就過往欠款、恐懼份子資金籌集或其他非法活動之制裁或防止或偵測而作出本集團內資料及資訊分享及/或任何其他使用資料及資訊的任何責任、規定、政策、程式、措施或安排；

④ 使本公司的責任或建議承諾人，或本公司對資料當事人的權利的參與人或附屬參與人評核意圖成為轉讓，參與或附屬參與的交易；

⑤ 與資料當事人或其他人士之資料比較以進行信貸調查，資料核實或以其他方法產生或核實資料，不論有關比較是否為對資料當事人採取不利之行動而推行；

⑥ 作為維持資料當事人的信貸記錄或其記號（不論資料當事人與本公司是否存在任何關係），以作現在或將來參考之用；及

⑦ 任何與上述第7段事項有關繫，有附帶性或有助的用途。

8. 本公司會對其持有的資料當事人資料保密，但如適用之法律有所要求，僅在獲得資料當事人的單獨同意的情況下本公司可能會把該等資料提供及披露（如條例及適用之法律所定義的）給下述各方為先前一段列出的用途：

(a) 任何代理人、承包人、或向本公司提供行車、電訊、電腦、付款或其他與本公司業務運作有關的服務的協力廠商服務供應商，不論其所在地；

(b) 任何對本公司包括本集團的任何成員有保密責任並已承諾對其保密有關資料的其他人士；

(c) 任何再保險人或索償調查公司，有關的保險行業協會及該等協會及聯合的會員；

(d) 信貸資料服務機構；

(e) 任何資料當事人已經或將會存在往來的金融機構、消費卡或信用卡發行公司、保險公司、證券及投資公司；

(f) 本公司及/或本集團在根據對本身及/或本集團約束力或適用於其本地或外國法律，法例或規規定下之責任或其他原因而必須向該人、實體、或政府或政府機構或金融仲介人作出披露，或按照及為實施由任何法定、監管、政府、稅務、執法或其他機構或金融服務提供者之自律監管或行業團體或組織所提供之指或發出之指或指導需預向向該人作出披露，或根據與本地或海外之法定、監管、政府、稅務、執法或其他機構或金融服務提供者之自律監管或行業團體或組織之間的任何合約承諾或其他承諾而向該人作出披露之任何人士，該等人士可能處於香港特別行政區境內或境外及可能是已存在、現有或將來出現的任何人士；

(g) 假如資料當事人的資料是被收集並用於處理其申請、調查和結清申索，以及偵測和防止欺詐行為，有關個人資料將會被轉移給以下人士，而他們只能在有合理需要履行前述任何一項目的之情況下才可收集和利用這些資料：保險理算人、代理人和經紀；僱主；醫護專業人士；醫院；會計師；財務顧問；律師；整合保險業申索和承保資料的組織；防欺詐組織；其他保險公司（無論是直接地，或是通過防欺詐組織或本段中指名的其他人士）；員警；和保險業就現有資料而對所提供的資料作出分析和檢查的數據庫或登記冊（及其運營者）。

(h) 本公司的任何在建議承讓人或就本公司對資料當事人的權利的參與人或附屬參與人或受讓人；及

① 本集團之任何成員；

② 協力廠商金融機構、承保人、信用卡公司、證券、商品及投資服務供應商；

③ 協力廠商獎賞、年資獎勵、聯名合作及優惠計劃供應商；

(i) 本公司及本集團之聯名合作夥伴（有關服務和產品的申請表上會提供聯名合作夥伴的名稱（視屬何情況而定））；及

④ 慈善或非牟利組織；及

⑤ 就上述第70段及適用於本公司使用之協力廠商服務供應商（包括但不限於代辦郵件公司、電訊公司、電話促銷及直銷代理人、電話服務中心、數據處理公司及資訊科技公司），不論其所在地。

本公司可能為上述第7段所列之不對資料當事人所用的資料轉移往香港特別行政區境外的地區，如適用之法律有所要求，本公司將徵求資料當事人對該等跨境傳輸活動的單獨同意。

9. 如適用之法律有所要求，本公司將在和協力廠商共用資料當事人的個人資料前，告知資料當事人接收姓名和聯繫方式、處理和提供其個人資料的目的和方式，以及將要提供和分享個人資料的種類，並徵求資料當事人對共用其個人資料的單獨同意。前述的個人資料接收方將為實現本通知下規定的目的所必需的範圍內使用個人資料，並在實現目的所需的最短時間內保存個人資料，或（如適用之法律有所要求）前述的個人資料接收方將按照適用之法律使用及保存個人資料。

10. 本公司收存的部分資料可能構成個人資訊保護法下的「敏感個人資料」，而只有在採取了嚴格的保護措施且在處理處以應充分必要的前提下，本公司才會處理敏感個人資料。如適用之法律有所要求，該等敏感個人資料將在獲得資料當事人的單獨同意後才進行處理。

11. 使用資料作直接促銷

本公司擬使用資料當事人的資料作直接促銷及本公司須為此目的取得資料當事人同意（包括資料當事人不反對之表示）。因此，請注意以下：

(a) 本公司所有資料當事人的姓名、聯絡詳情、產品及服務投資組合資訊、交易模式及行徑、財務背景及統計資料可不時被本公司用於直接促銷；

(b) 以下服務、產品及類別可作推廣：

① 財務、保險、信用卡、證券、商品、投資、銀行及相關服務和產品；

② 獎賞、年資獎勵或優惠計劃及相關服務和產品；

③ 本公司的聯名合作夥伴提供之服務和產品（有關服務和產品的申請表上會提供聯名合作夥伴的名稱（視屬何情況而定））；及

④ 為慈善及/或非牟利的目的之捐款及資助；

(c) 上述服務、產品及類別可由本公司或/或旗下人士提供（或如涉及捐款及資助）募捐：

① 本集團之任何成員；

② 協力廠商金融機構、承保人、信用卡公司、證券、商品及投資服務供應商；

③ 協力廠商獎賞、年資獎勵、聯名合作及優惠計劃供應商；

(iv) 本公司及本集團之聯名合作夥伴（有關服務和產品的申請表上會提供聯名合作夥伴的名稱（視屬何情況而定））；

(v) 慈善或非牟利組織；及

(d) 除非本公司推廣上述服務、產品及類別的外，本公司同時擬提供列明於上述第11(a)段之資料至上述第11(c)段的所有或其中任何人士，該等人士藉以用於推廣上述服務、產品及類別的，並本公司須為此目的取得資料當事人同意（其中包括資料當事人不反對之表示）。

若資料當事人不願意本公司使用或提供其資料予其他人士，藉以用於以上所定之直接促銷，資料當事人可通知本公司以行使其不同意此安排的權利。

12. 本公司或協力廠商服務供應商可能會應用大數據分析和人工智能（「BDAI」）處理和分析資料當事人的資料，以實現上述第7段所列出的用途。本公司亦可能應用BDAI促進自動化決策，以提升客戶服務及體驗、加強風險管理及合規、提供個人化產品或服務，以及改善營運效率。

13. 使用本公司開應用程式介面（「Open API」）向資料當事人的協力廠商服務供應商轉移個人資料。

本公司可根據資料當事人向本公司或資料當事人使用之協力廠商服務供應商所發出的指示，使用本公司的Open API向協力廠商服務供應商轉移資料當事人的資料，以作本公司或協力廠商服務供應商所通知資料當事人的用途及/或資料當事人根據條例所同意的用途。

14. 根據條例及/或適用之法律的條款，任何資料當事人有權：

(a) 查核本公司是否持有他的資料及要求查閱該等資料；

(b) 要求本公司改正任何有關他的不準確的資料；

(c) 查明關於本公司保障個人資料私隱的政策及實務和獲知本公司持有的個人資料種類；

(d) 根據適用之法律：

① 要求本公司刪除其個人資料；

② 反對以其額定方式使用其個人資料；

③ 要求對處理其個人資料的規則進行解釋說明；

④ 要求本公司將其向本公司提供的個人資料轉移給其選擇的協力廠商；

⑤ 撤回批露、處理或轉移其個人資料的同意（資料當事人撤回他們的同意可能導致本公司無法評估/處理你的申請及/或提供保險及相關服務和產品）；和

⑥ 要求對自動化決策過程中產生的決定進行解釋，以及拒絕接受僅由自動化決策技術作出的決定。

15. 根據條例及/或適用之法律的條款，本公司有權就處理任何查閱資料的要求收取合理費用。

16. 任何關於查詢或改正資料，或索取關於本公司保障個人資料私隱的政策及實務或所持有的資料種類的要求，應向下列人士提出：

中銀集團人壽保險有限公司

資料保障主任

中銀集團人壽保險有限公司

香港太古城皇庭道111號13樓

傳真：(852) 2522 1219

17. 本公司會不時更新本聲明，並建議閣下瀏覽本公司網站以瞭解我們的個人資料收集聲明。本聲明可在本公司網站(<https://www.boclife.com.hk/tc/personal-information-collection-statement.html>)上查閱。客戶如想索取我們最新的個人資料收集聲明，請致電客戶服務熱線(852) 2860 0688與本公司聯絡。

18. 本聲明的英文版本與中文版本如有任何分歧，一概以英文版本為準。

二零二六年一月

Personal Information Collection Statement

At BOC Group Life Assurance Company Limited ("BOC Life"), the protection of personal information of our customers is important to us. As a provider of insurance products and services, the collection and use of the personal information of our customers is fundamental to our daily business operations.

If you wish to understand BOC Life's Privacy Policy Statement in detail, you may visit relevant document using the hyperlink below <http://www.boclife.com.hk/en/privacy-policy.html>.

1. This Statement sets out the data policies of BOC Group Life Assurance Company Limited (the "Company") in respect of data subjects (as hereinafter defined).

2. For the purposes of this Statement, the "Group" means the Company and its holding companies, branches, subsidiaries, representative offices and affiliates of the Company's holding companies, wherever situated.

3. The term "data subject(s)", wherever mentioned in this Statement, includes the following categories of individuals:

(a) applicants for or customers/users, including policyowner(s), claimant(s), beneficiary(ies), life insured(s), and/or relevant individuals, of insurance and related services and products and facilities and so forth provided by the Company and their authorized signatories;

(b) directors, shareholders, officers and managers of any corporate applicants and data subjects/users; and

(c) suppliers, contractors, service providers and other contractual counterparties of the Company.

For the avoidance of doubt, "data subjects" shall not include any incorporated bodies. The contents of this Statement shall apply to all data subjects and form part of any contracts and/or policies that the data subjects have or may enter into with the Company from time to time. If there is any inconsistency or discrepancy between this Statement and the relevant contract and/or policy, this Statement shall prevail insofar as it relates to the protection of the data subjects' personal data. Nothing in this Statement shall limit the rights of the data subjects under the Personal Data (Privacy) Ordinance (Cap. 486, Laws of Hong Kong) (the "Ordinance") and/or other applicable laws, including the laws within or outside the Hong Kong Special Administrative Region.

4. From time to time, it is necessary for the data subjects to supply the Company with personal data (including through interfaces powered by artificial intelligence) in connection with the provision, continuation and administration of insurance and/or related products and services to the data subjects, the processing of claims under insurance policies issued by the Company, the processing of any and all other requests, enquiries and complaints from the data subjects, and/or compliance with any laws, guidelines or requests issued by regulatory or other authorities within or outside the Hong Kong Special Administrative Region (including but not limited to the implementation of the U.S. Foreign Account Tax Compliance Act ("FATCA") pursuant to the intergovernmental agreement ("IGA") between the Hong Kong Special Administrative Region and the U.S., the tax information exchange agreement that the Hong Kong Special Administrative Region signed with the U.S. on 25 March 2014, and the provisions issued by the Organization for Economic Co-operation and Development, including the regulatory scheme relating to its Competent Authority Agreement ("CAA") to implement its Common Reporting Standard ("CRS").

5. Failure to supply such data may result in the Company being unable to assess / process your application and / or provide insurance and related services and products, due to lack of information. We may also be required to report to applicable regulatory authority(ies) values and payment amounts under the insurance policy if you refuse to give the said express consent; under specified circumstances, withhold some or all benefit under the insurance policy if you refuse to give the express consent; or terminate the policy.

6. Data relating to the data subjects are collected or received by the Company from various sources from time to time. Such data may include, but not limited to, data collected from data subjects in the ordinary course of the continuation of the relationship between the Company or any member of the Group and data subjects, for example, when data subjects write cheques, deposit money, effect transactions through credit cards issued or serviced by the Company or any member of the Group or generally communicate verbally or in writing with the Company. Data may also be generated or combined with other information, available to the Company or any member of the Group.

7. The purposes for which the data relating to the data subjects (including credit information and claims history) may be used will vary depending on the nature of the data subjects' relationship with the Company and / or the Group, they may include the following:

- (a) processing, evaluation and/or approving applications for insurance products and services, investigate and settle claims, detect and prevent fraud (whether or not relating to the policy issued in respect of this application) and additions, alterations, variations, cancellations, renewals, and reinstatements of such products and services;
- (b) administering insurance policies issued by the Company and/or the Group;
- (c) researching and/or designing insurance/financial products and/or services for customers' use;
- (d) any purposes with regard to any claims made by or against or otherwise involving you in relation to any products and/or services provided by the Company and/or the Group including, but not limited to, making, defending, analyzing, investigating, processing, assessing, determining, settling or responding to such claims;
- (e) conducting identity and/or credit checks whenever appropriate and carrying out data matching procedures;
- (f) complying with the obligations, requirements or arrangements for disclosing and using data that apply to the Company and/or the Group or that it is expected to comply according to:
 - (i) any local or foreign law, legislation or regulation binding or applying to it within or outside the Hong Kong Special Administrative Region existing currently and in the future;
 - (ii) any guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of financial services providers within or outside the Hong Kong Special Administrative Region existing currently and in the future;
 - (iii) any present or future contractual or other commitment with a local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities or financial intermediary, or self-regulatory or industry bodies or associations of financial services providers that is assumed by or imposed on the Company and/or the Group by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign legal, regulatory, governmental, tax, law enforcement or other authority, or self-regulatory or industry bodies or associations and/or the obligations of the Company and/or the Group to comply with applicable tax laws including but not limited to FATCA and the IGA;
- (g) processing (including, but not limited to, investigating, analyzing, underwriting and adjudicating) claims under insurance policies issued by the Company
- (h) marketing services, products and other subjects (please see further details in paragraph 11 below);
- (i) providing customer services (including, but not limited to, processing enquiries and complaints) and related activities;
- (j) conducting statistical or actuarial research of the Company and/or the Group;
- (k) determining amount of indebtedness owed to or by you, and enforcing your obligations including without limitation the collection of amounts outstanding from you or any person who has provided any security or undertaking for your liabilities owing to the Group;
- (l) complying with any obligations, requirements, policies, procedures, measures or arrangements for sharing data and information within the Group and/or any other use of data and information in accordance with any group-wide programmes for compliance with sanctions or prevention or detection of money laundering, terrorist financing or other unlawful activities;
- (m) enabling an actual or proposed assignee of the Company, or participant or sub-participant of the Company's rights in respect of the data subjects to evaluate the transaction intended to be the subject of the assignment, participation or sub-participation;
- (n) comparing data of data subjects or other persons for credit checking, data verification or otherwise producing or verifying data, whether or not for the purpose of taking adverse action against data subjects;
- (o) maintaining a credit history or otherwise, a record of data subjects (whether or not there exists any relationship between data subjects and the Company) for present and future reference; and
- (p) any purposes incidental, associated or relating to Paragraph 7.

8. Data held by the Company relating to data subjects will be kept confidential but, subject to the data subject's separate consent (insofar as required by applicable laws), the Company may provide and disclose (as defined in the Ordinance and/or applicable laws) such data to the following parties for the purposes set out in the previous paragraph:-

- (a) any agent, contractor or third party service provider who provides administrative, telecommunications, computer, payment or other services to the Company in connection with the operation of its business, wherever situated;
- (b) any other person under a duty of confidentiality to the Company including any member of the Group which has undertaken to keep such information confidential;
- (c) any reinsurance and claims investigation company, relevant insurance industry association and federation, and members of such industry associations and federations;
- (d) credit reference agencies, and, in the event of default, to debt collection agencies;
- (e) any financial institution, charge or credit card issuing company, insurance company, securities and investment company with which the data subjects have or propose to have dealings;
- (f) any person, entity, or government or government agency or financial intermediary, to whom the Company and/or the Group is under an obligation or otherwise required to make disclosure under the requirements of any local or foreign law, legislation or regulation binding on or applying to the Company and/or the Group, or any disclosure under and for the purposes of any guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of financial services providers with which the Company and/or the Group is expected to comply, or any disclosure pursuant to any contractual or other commitment of the Company or the Group with local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of financial services providers, all of which may be within or outside the Hong Kong Special Administrative Region and may be existing currently and in the future;
- (g) if the data relating to the data subjects is being collected and used for the purpose of processing your application, investigating and settling claims and preventing and detecting fraud, such personal data will be transferred to the following persons who may collect and use this information only as reasonably necessary to carry out one of the aforementioned purposes: insurance adjusters, agents and brokers; employers; health care professionals; hospitals; accountants; financial advisors; solicitors; organisations that consolidate claims and underwriting information for the insurance industry; fraud prevention organisations; other insurance companies (whether directly or through fraud prevention organisation or other persons named in this paragraph), the police and databases or registers (and their operators) used by the insurance industry to analyse and check information provided against existing information.
- (h) any actual or proposed assignee of the Company or participant or sub-participant or transferee of the Company's rights in respect of the data subject; and
- (i) (i) any member of the Group;
 - (ii) third party financial institutions, insurers, credit card companies, securities, commodities and investment services providers;
 - (iii) third party reward, loyalty, co-branding and privileges programme providers;
 - (iv) co-branding partners of the Company and the Group (the names of such co-branding partners can be found in the application form(s) for the relevant services and products, as the case may be);
 - (v) charitable or non-profit making organisations; and
 - (vi) external service providers (including but not limited to mailing houses, telecommunication companies, telemarketing and direct sales agents, call centres, data processing companies and information technology companies) that the Company engages for the purposes set out in paragraph (7)(h) above, wherever situated.

The Company may from time to time transfer the data relating to the data subjects to a place outside Hong Kong Special Administrative Region for the purposes set out in paragraph 7 above. Insofar as required by applicable laws, the Company will obtain the data subject's separate consent in relation to such international transfers.

9. To the extent required by applicable laws, the Company will, prior to sharing the data subject's personal data with third parties, notify the data subject of the name and contact details of the recipients, the purposes and means of processing and provision of the data subject's personal data, and the types of personal data to be provided and shared, and obtain the data subject's separate consent to the sharing of the data subject's personal data. The foregoing data recipients will use the personal data to the extent necessary for the specific purposes set out in this Notice and store the personal data for the minimum length of time required to fulfil the purposes, or insofar as required by applicable laws, in accordance therewith.

10. Some of the data collected by the Company may constitute sensitive personal data under applicable laws. In this case, the Company will only process sensitive personal data if strict protection measures are put in place and there is sufficient necessity to justify the processing. Insofar as required by applicable laws, such sensitive personal data will be processed with the data subject's separate consent.

11. USE OF DATA IN DIRECT MARKETING

The Company intends to use the data subject's data in direct marketing and the Company requires the data subject's consent (which includes an indication of no objection) for that purpose. In this connection, please note that:

- (a) the name, contact details, products and services portfolio information, transaction pattern and behaviour, financial background and demographic data of the data subject held by the Company from time to time may be used by the Company in direct marketing;
- (b) the following classes of services, products and subjects may be marketed:
 - (i) financial, insurance, credit card, securities, commodities, investment, banking and related services and products;
 - (ii) reward, loyalty or privileges programmes and related services and products;
 - (iii) services and products offered by the Company's co-branding partners (the names of such co-branding partners can be found in the application form(s) for the relevant services and products, as the case may be); and
 - (iv) donations and contributions for charitable and/or non-profit making purposes;
- (c) the above services, products and subjects may be provided or (in the case of donations and contributions) solicited by the Company and/or:
 - (i) any member of the Group;
 - (ii) third party financial institutions, insurers, credit card companies, securities, commodities and investment services providers;
 - (iii) third party reward, loyalty, co-branding and privileges programme providers;
 - (iv) co-branding partners of the Company and the Group (the names of such co-branding partners can be found in the application form(s) for the relevant services and products, as the case may be); and
 - (v) charitable or non-profit making organisations;

(d) in addition to marketing the above services, products and subjects itself, the Company also intends to provide the data described in paragraph 11(a) above to all or any of the persons described in paragraph 11(c) above for use by them in marketing those services, products and subjects, and the Company requires the data subject's written consent (which includes an indication of no objection) for that purpose.

If a data subject does not wish the Company to use or provide to other persons his data for use in direct marketing as described above, the data subject may exercise his opt-out right by notifying the Company.

12. The Company or its third party service providers may use Big Data Analytics and Artificial Intelligence (BDAI) to process and analyse data relating to the data subjects to achieve the purposes listed in paragraph 7 above. The Company may also use BDAI to facilitate automated decision-making for enhancing customer services and experiences, strengthening risk management and compliance, offering personalized products and services, as well as improving operational efficiency.

13. TRANSFER OF PERSONAL DATA TO DATA SUBJECT'S THIRD PARTY SERVICE PROVIDERS USING THE COMPANY'S OPEN APPLICATION PROGRAMMING INTERFACES ("OPEN API")

The Company may, in accordance with the data subject's instructions to the Company or third party service providers engaged by the data subject, transfer data subject's data to third party service providers using the Company's Open API for the purposes notified to the data subject by the Company or third party service providers and/or as consented to by the data subject in accordance with the Ordinance.

14. Under and in accordance with the terms of the Ordinance and/or applicable laws, any data subject has the right:-

- (a) to check whether the Company holds data about him and to request access to such data;
- (b) to require the Company to correct any data relating to him which is inaccurate;
- (c) to ascertain the BOC Life's protecting personal data privacy policies and practices and to be informed of the kind of personal data held by the Company;
- (d) in accordance with applicable laws,
 - (i) to request the Company to delete his/her personal data;
 - (ii) to object to certain uses of his/her personal data;
 - (iii) to request an explanation of the rules governing the processing of his/her personal data;
 - (iv) to ask that the Company transfer personal data that he/she has provided to the Company to a third party of his/her choice under circumstances as provided under applicable laws;
 - (v) to withdraw any consent for the collection, processing or transfer of his/her personal data (the data subject should note that withdrawal of their consent may result in the Company being unable to provide, continue and administrate the insurance and/or related products and services); and
 - (vi) to have decisions arising from automated decision making ("ADM") processes explained and to refuse to such decisions being made solely by ADM.

15. In accordance with the terms of the Ordinance and/or applicable laws the Company may charge a reasonable fee for the processing of any data access request.

16. The person to whom requests for access to data or correction of data or for information regarding BOC Life's protecting personal data privacy policies and practices and kinds of data held are to be addressed is as follow:

BOC Group Life Assurance Company Limited

The Data Protection Officer
BOC Group Life Assurance Company Limited
13/F, 1111 King's Road, Tsim Sha Tsui, Hong Kong
Facsimile: (852) 2522 1219

17. We update this Statement from time to time. We encourage you to familiarise yourself with this Statement on our Company's website. This Statement is available on our website at <https://www.boclife.com.hk/en/personal-information-collection-statement.html>. If you would like to obtain a latest copy of this Statement, please contact our customer service hotline at +852 2860 0688.

18. If there is any inconsistency between the English version and the Chinese version of this Statement, the English version shall prevail.

January 2026

乙部 - 由主診醫生填寫，所需費用由索償人自行承擔。

PART II - TO BE COMPLETED BY THE ATTENDING PHYSICIAN/SURGEON AT THE CLAIMANT'S OWN EXPENSES

死者資料 Details of Deceased	姓名 Name	身份證號碼 ID No.	年齡/性別 Age/Sex
1. 死亡日期及地點 Date and Place of Death			
2. 直接的死亡原因 Immediate Cause of Death			
3. 就此最後疾病之首次求診日期 Date of first consultation related to the last illness.			
4. 就此最後疾病於首次求診時之主訴/病徵 Chief complaints/symptoms related to the last illness at the first consultation.			
5. 根據你的意見，死者於首次求診前，該最後疾病已持續多久？ How long, in your opinion, had the deceased suffered from the last illness prior to his/her first attendance?			
6. 你是否病人慣常求診的醫生？ Are you the patient's usual physician?	<input type="checkbox"/> 是 YES 醫療紀錄可追溯至 Medical record date back to _____ (年/月/日 YY/MM/DD) <input type="checkbox"/> 否 NO		
7. 病人是否經其他醫生轉介？ Is the patient referred by another doctor?	<input type="checkbox"/> 是 YES 轉介醫生的姓名和地址 Name and address of the referral doctor _____ <input type="checkbox"/> 否 NO		
8. 其他曾就死者相同/相關的病徵提供治療的醫生/醫院 Other physician(s)/hospital(s) who attended the deceased for the same / related conditions			
9. 此死亡是否由於復發或慢性病況繼發而來？ Was the death secondary to a recurrent or chronic condition?	<input type="checkbox"/> 是 YES, 請提供詳情 Please provide details <input type="checkbox"/> 否 NO		
10. 有否任何因素促使或導致是此死亡？ Were there any precipitating factors which may have contributed to or hastened the death of the deceased?	<input type="checkbox"/> 是 YES, 請提供詳情 Please provide details <input type="checkbox"/> 否 NO		
11. 死者之直系家屬中有否曾患有相同/相關的疾病？ Had any of the deceased's immediate family members suffered from similar or related illnesses?	<input type="checkbox"/> 是 YES, 請提供詳情 Please provide details <input type="checkbox"/> 否 NO		
12. 是否有其他死者慣常求診的醫生？ Was there any usual physician of the deceased other than you?	<input type="checkbox"/> 是 YES, 請提供詳情 Please provide details <input type="checkbox"/> 否 NO		
13. 請提供死者曾求診過之所有醫療病況詳情 Please list details of all medical conditions that the deceased had ever consulted you with	求診日期 <u>Consultation Date</u> 主訴/病徵及時期 <u>Complaint/Symptoms & Duration</u> 診斷檢驗及結果 <u>Diagnostic Tests & Results</u> 診斷及治療 <u>Diagnosis & Treatments</u> _____ _____ _____ _____		

14. 住院紀錄 Hospitalization Record	醫院名稱 <u>Name of Hospital</u> <hr/> <hr/> <hr/> <hr/>	住院時期 <u>Confinement Period</u>	手術程序及日期(年/月/日) <u>Surgical Procedure and Date(YY/MM/DD)</u> <hr/> <hr/> <hr/> <hr/>
15. 你是否知道死者曾患有任何其他的嚴重、慢性或先天疾病？ Have you ever heard of the deceased suffering from any other major, chronic or congenital disease?	<input type="checkbox"/> 是 YES, 請提供詳情 Please provide details <input type="checkbox"/> 否 NO		
16. 死者是否因其他原因，直接或間接引致或加劇死亡？ Was the deceased's death directly or indirectly due to or aggravated by other factors?	<input type="checkbox"/> 是 YES 請在適當位置劃上剔號並提供詳情 Please tick where it is appropriate and give details <input type="checkbox"/> 酒精/麻醉劑/藥品中毒 Intoxication by alcohol/ narcotics/ drug <input type="checkbox"/> 參與危險性運動/活動 Hazardous sport/ activity <input type="checkbox"/> 自殺或自致之傷害 Suicide/ self- inflicted injury <input type="checkbox"/> 先天性情況 Congenital condition <input type="checkbox"/> 精神紊亂 Mental disorder <input type="checkbox"/> 愛滋病/與愛滋病相關的併發症 AIDS/ AIDS related complex disease <input type="checkbox"/> 其他 Others _____ <input type="checkbox"/> 否 NO		
17. 死者過往有否右列之習慣？ Did the deceased have the following past habit?	<input type="checkbox"/> 是 YES 請在適當位置劃上剔號並提供詳情 Please tick where it is appropriate and give details <input type="checkbox"/> 濫用藥物 Drug addiction <input type="checkbox"/> 吸煙習慣 Smoking habit <input type="checkbox"/> 飲酒習慣 Drinking habit 詳情 Details: 以上習慣開始於 The above habit since _____ 至 to _____ 類別 Type _____ 每天用量 Daily Consumption Amount _____ <input type="checkbox"/> 否 NO		
18. 其他與此索償有關的資料 Additional information you consider relevant to this claim			
本人謹此聲明曾為受保人作出診治，而據本人所知所信，以上填報的各項答案均屬正確。 I hereby certified that I did personally treat the patient and that the answers given above are all true to the best of my knowledge and belief.			
主診/專科醫生的姓名 (資歷) Name of Attending Physician/Specialist (with qualifications)		地址 Address	
主診/專科醫生簽名 (蓋印) Signature of Attending Physician/Specialist (with chop)		日期 Date	