



## Request for Change of Insurance Intermediary 更改保險中介人申請表

Policy Number  
保單號碼

Private & Confidential 私人及機密

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Name of Policyholder  
保單持有人姓名

Name of Insured  
受保人姓名

### IMPORTANT NOTE 注意事項

This Form should be completed in BLOCK LETTERS in BLACK/BLUE PEN. Any corrections made should be signed / initialed by the Form signatory or you should complete a new Form. Your request of change may not be processed until all requested information has been provided to Generali Life (Hong Kong) Limited / Assicurazioni Generali S.p.A. Hong Kong Branch (whichever applicable) (the "Company"). After the Company has completed this request, the existing insurance intermediary shall not be allowed to access the information of the above policy. A written confirmation and / or endorsement will be issued to you after the acceptance of your request of change.

本申請表應用黑色 / 藍色筆以英文正楷填寫。本表格內任何修改應在旁加簽或重新填寫一份。若所提供的資料未能達到忠意人壽(香港)有限公司 / 忠意保險有限公司香港分行(如適用)(「本公司」)之所有要求,此更改之申請有可能不會受理。當本公司完成是次更改申請後,原有保險中介人將不能再查閱以上保單的資料。本公司接受更改保單申請後會向閣下發出書面確認及 / 或批註。

I / We \_\_\_\_\_ (Name of Policyholder), hereby appoint \_\_\_\_\_  
本人 / 我們 (保單持有人姓名) 現委任

\_\_\_\_\_ (Full Name of New Insurance Intermediary) \_\_\_\_\_ (Generali Insurance Intermediary Code) as my / our  
(新保險中介人全名) (忠意保險中介人號碼) 作為本人 / 我們

insurance intermediary for my / our policy as stated above.  
上述保單之保險中介人。

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

X

Signature of Policyholder  
保單持有人簽署

Date (DD / MM / YYYY)  
日期(日 / 月 / 年)

Assignee hereby consents to the above request(s) for  
change applied by the Policyholder.  
承讓人特此同意保單持有人以上之變更請求之申請。

X

Signature of Assignee (if any)  
承讓人簽署(如適用)  
If signed by company authorized signatory(ies),  
please indicate his/her title with Company Chop  
如由公司獲授權簽署人士簽署,  
請列明其職銜及加上公司蓋印

X

Signature of Irrevocable Beneficiary (if any)  
不可撤換受益人簽署(如適用)

X

Signature of Witness  
見證人簽署

(Name 姓名: \_\_\_\_\_ )

## Personal Information Collection Statement 收集個人資料聲明

- a) From time to time, it is necessary for you to supply Generali Life (Hong Kong) Limited / Assicurazioni Generali S.p.A. Hong Kong Branch (where applicable) (the "Company") with data about yourself(ves), policyholder(s), life insured(s), beneficiary(ies), claimant(s), and/or other relevant individuals (the "Personal Data") in connection with the provision of insurance and/or related products and services to you, the processing of claims under insurance policies issued and/or arranged by the Company, and/or the processing of any or all other requests, enquiries and complaints from you.  
閣下須要不時向忠意人壽(香港)有限公司/忠意保險有限公司香港分行(如適用)(「本公司」)提供關於閣下自己、保單持有人、受益人、索償人及/或其他有關人士的資料(「個人資料」),以讓本公司為閣下提供保險及/或相關產品與服務,處理經由本公司發出及/或安排的保單之下的索償事宜,及/或處理閣下提出的任何或所有其他要求、查詢和投訴。
- b) Provision of the Personal Data to the Company by you is voluntary. However, failure to supply the Personal Data may result in the Company being unable to provide insurance and/or related products and services to you, process claims under insurance policies issued and/or arranged by the Company, and/or process any or all other requests, enquiries, or complaints from you.  
閣下向本公司提供的個人資料全屬自願。然而,若閣下未能提供個人資料,可能導致本公司不能夠為閣下提供保險及/或相關產品與服務,處理經由本公司發出及/或安排的保單之下的索償事宜,及/或處理閣下提出的任何或所有其他要求、查詢和投訴。
- c) The purposes for which the Personal Data may be used are as follows: (i) administering your insurance application, arranging and executing insurance contracts and/or related products and services, and managing your account with the Company;(ii) processing (including, but not limited to, investigating, analyzing, assessing and adjudicating) and/or settlement of claims under insurance policies issued and/or arranged by the Company;(iii) exercising rights of subrogation(if applicable);(iv) collection of amounts outstanding (if any) from customers;(v) arranging coinsurance and/or reinsurance in respect of the insurance policies issued and/or arranged by the Company;(vi) communicating with customers via telephone, mail, e-mail, facsimile and other communication means;(vii) providing customer services (including, but not limited to, processing enquiries and complaints) and other related activities;(viii) conducting data matching procedures;(ix) designing insurance and/or related products and services for customers' use;(x) statistical or actuarial research of the Company, Company's parent company and group companies (hereinafter referred to as the "Group Entities"), insurance industry associations or federations, government departments, regulatory or other recognized bodies;(xi) complying with the requirements under any laws, rules, regulations, codes, guidelines, court orders, compliance policies and procedures, and any other relevant requirements which the Company and/or its Group Entities are expected to comply with, including, without limitation, performing due diligence on customers and making disclosures of the relevant information; and(xii) fulfilling any other purposes directly relating to (i) to (xi) above.  
個人資料可被用於以下用途:(i)處理閣下的保險申請,安排並執行保險合約或相關產品與服務,並管理閣下在本公司的賬戶;(ii)處理(包括但不限於調查、分析、評估和裁定)及/或理賠經由本公司發出及/或安排的保單之下的索償事宜;(iii)行使代位權(如適用);(iv)向客戶追收尚欠金額(如有);(v)經由本公司發出及/或安排的保單之下籌劃共同保險及/或再保險;(vi)透過電話、郵件、電郵、傳真及其他通訊方式與客戶聯絡;(vii)提供客戶服務(包括但不限於處理查詢和投訴)及其他相關活動;(viii)進行資料核對程序;(ix)設計保險及/或相關產品與服務供客戶使用;(x)本公司的母公司及集團公司(下文合稱為「集團實體」)、保險業協會或聯會、政府部門、監管或其他認可機構的統計或精算研究;(xi)為遵從任何法律、規則、規例、守則、指引、法院命令、合規政策和程序的規定,或本公司及/或集團實體應遵守的任何其他有關規定,包括但不限於對客戶進行盡職審查及披露有關資料;及(xii)實現與上述(i)至(xi)直接有關的任何其他用途。
- d) The Company requires your separate consent to the use and provision of Personal Data in direct marketing (which includes an indication of no objection) to use your Personal Data, including but not limited to name, contact details, other products and services portfolio information, transaction pattern and behavior, financial background and demographic information, etc., to send you direct marketing communications regarding the following classes of products and services, including but not limited to direct marketing of: insurance related products and services; health, wellness, medical, hospitality and accommodation, and lifestyle and entertainment related products and services; discounts, promotions, rewards, loyalty or privileges programs related to the foregoing products and services; and donations and contributions for charitable or non-profit making purposes ("Classes of Marketing Subjects").The Company also intends to provide your Personal Data to the Group Entities and third party service providers selected by the Company, including, without limitation, call centers, so that they may send you direct marketing communications regarding the same Classes of Marketing Subjects.  
本公司須取得閣下的另行同意使用及提供個人資料作直接促銷(包括表示不反對)方可使用閣下的個人資料(包括但不限於姓名、聯絡資料、其他產品及服務組合資訊、交易模式與行為、財務背景及人口統計資料等)向閣下發送有關以下類別產品及服務的直接促銷通訊,包括但不限於直接促銷:保險相關產品及服務;健康、保健、醫療、住院和家居,以及生活和娛樂及其相關之產品與服務;與前述產品及服務相關之折扣、推廣、獎賞、客戶忠誠或優惠計劃;以及為慈善或非牟利用途的捐款和捐贈(「促銷目的類別」)。本公司亦擬將閣下的個人資料提供予集團實體,以及本公司選定的第三方服務供應商(包括但不限於電話服務中心),以便其向閣下發送關於上述促銷目的類別的直接促銷通訊。
- e) The Personal Data held by the Company shall be kept confidential, but the Company may provide the Personal Data to the following parties (whether within or outside the Hong Kong Special Administrative Region) for the purposes set out in paragraph (c) above, without prior notification to you and/or any other relevant individuals to whom the Personal Data is related: (i) intermediaries, claims service provider, reinsurers, banks and credit-card companies, health and medical organizations, professional advisers, contractors, business partners, and / or any other relevant parties, as appropriate, who provide administrative, telecommunication, computer, payment, marketing, investigation, advisory and/ or other services to the Company in connection with the operation of its business; (ii) relevant insurance industry associations or federations, and/ or members of such industry associations or federations; (iii) overseas locations or branches, as appropriate, of the Company and/or its Group Entities; (iv) persons to whom the Company and/or its Group Entities are under an obligation to make disclosure under the requirements of as mentioned in (c) (xii); (v) any court, government departments, regulatory or other recognized bodies (including, without limitation, tax authority, insurance authority, etc.) under any laws binding on the Company and/or its Group Entities; (vi) lawful successors or assigns of the Company; and (vii) persons who owe a duty of confidentiality to the Company and/or its Group Entities.  
由本公司持有的個人資料將受到保密,但本公司可依據以上(c)段所列的用途向以下各方(不論在香港特別行政區境內還是境外)提供個人資料,事前無須知會閣下及/或該等個人資料所涉及的任何其他有關人士:(i) 中介人、索償服務提供商、共同保險公司、再保險公司、銀行及信用卡公司、健康及醫療機構、專業顧問、承包商、業務夥伴及/或以任何適用於向本公司提供行政、電訊、電腦、付款、推銷、調查、諮詢及/或其他與業務營運相關服務的有關各方;(ii) 相關的保險業協會或聯會,及/或該等協會或聯會的成員;(iii) 本公司及/或以適用的集團實體海外辦事處或分行;(iv) 根據上述(c)(xii)的規定,本公司及/或集團實體負有義務須向其作出披露的人士;(v) 任何根據法律約束之下,本公司及/或集團實體須向其提供資料的任何法院、政府部門、監管或其他認可機構(包括但不限於稅務局、保險業監管局等);(vi) 本公司的合法繼承人或受讓人;及(vii) 對本公司及/或集團實體負有保密責任的人士。
- f) The Company may verify any or all of the Personal Data by using information collected and released or transferred by relevant insurance industry associations or federations, and/or members of such industry associations or federations.  
本公司可使用由相關的保險業協會或聯會及/或該等協會或聯會的成員所收集及發放或轉移的資料,來核實任何或所有個人資料。
- g) In accordance with the Personal Data (Privacy) Ordinance (Cap 486): (i) any individual has the right to: (A) check whether the Company holds Personal Data about him / her and, if so, obtain a copy of such data; (B) require the Company to correct any Personal Data relating to him / her that is inaccurate; and (C) ascertain the Company's policies and practices in relation to Personal Data and to be informed of the kind of Personal Data held by the Company; and (ii) the Company has the right to charge a reasonable fee for the processing of any data access request.  
根據第486章《個人資料(私隱)條例》:(i) 任何人士均有權:(A)查詢本公司有沒有持有其個人資料,如有的話,可取得一份該等資料;(B)要求本公司改正其任何不正確的個人資料;及(C)查明關於本公司的個人資料政策和處事常規,並可獲通知有關本公司所持個人資料的種類;及(ii) 本公司有權就處理任何查閱個人資料的要求之下收取合理的費用。
- h) The person to whom requests for access to Personal Data and/or correction of Personal Data and/or for information regarding policies and practices and kinds of Personal Data held are to be addressed as follows:  
如欲查閱及/或改正個人資料及/或查詢關於本公司的政策和處事常規及所持個人資料的種類,請向以下人員提出要求:

Personal Data Protection Officer, Generali Life (Hong Kong) Limited / Assicurazioni Generali S.p.A. Hong Kong Branch (where applicable), 21/F, 1111 King's Road, Taikoo Shing, Hong Kong  
個人資料保護主任忠意人壽(香港)有限公司或忠意保險有限公司香港分行(如適用)香港太古城英皇道1111號21樓

Note: In case of discrepancies between the English and Chinese versions of this Personal Information Collection Statement, the English version shall prevail.

附註:本收集個人資料聲明的英文及中文版本之間如有任何歧義,概以英文版本為準。

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