

Broker Bulletin No 272
New Version of Policy Services Forms & Operation Changes
新版本之保單行政申請書及營運更改

Dear Business Partners,

To align with our long term business transfer from AXA (Hong Kong) Life Insurance Company Limited to AXA China Region Insurance Company (Bermuda) Limited. With effect today there are various changes on Life Operation. :

A. New version form for policy administration

1. Major Changes

- Removal of the company name of “AXA (Hong Kong) Life Insurance Company Limited”
- A new section "Application of Change types" is added to most of the forms. Customer is required to tick the checkbox(es) of the requested change(s).
- A new section “Death Benefit Option” for downgrade to “Level Benefit” is added to Investment-Linked Policy Miscellaneous Application Form (LFPA008-1212).

2. List of forms

Item No	Old Form Code	New Form Code	Form Name
1	LFPA008-1205	LFPA008-1212	Investment-Linked Policy Miscellaneous Application Form
2	LFPA011-1205	LFPA011-1212	Application for Cash Withdrawal/Policy Loan Agreement and Assignment
3	LFPA012-1205	LFPA012-1212	Policy Service Application Form I
4	LFPA015-1205	LFPA015-1212	Application For Change Of Customer Contact Details & Life eService
5	PS-DDAAGR-1111	PS-DDAAGR-1212	Direct Debit Authorization Agreement <i>(For AXAHK use only)</i>
6	CS001-1107	CS001-1212	Third-party Payment Declaration Form
7	LFUW058-1205	LFUW058-1212	Policy Service Application Form II
8	LFPA003-1205	LFPA003-1212	Agreement and Assignment of Policy as Collateral Security
9	LFPA004-1204	LFPA004-1212	Absolute Assignment
10	LFPA010-1205	LFPA010-1212	AXA Vertex Annuity InvestLife Plan Miscellaneous Application Form
11	LFPA013-1205	LFPA013-1212	Application/Change/Termination of Trust Form
12	LFPA014-1205	LFPA014-1212	Paramount Investment Insurance Plan Miscellaneous Application Form
13	LFPA016-1204	LFPA016-1212	Supplement - For Corporate Owner
14	LFPS003-1205	LFPS003-1212	Application For Policy Surrender

3. Form delivery arrangement

- Forms can be downloaded from AWB. Client signature on all pages is required for using download form.
- Hard copy order can be made via FI department or your relationship manager.

4. Form Effective Date & Transitional Period

- Effective Date: Today
- Transitional Period:
 - Old version of Policy Services Forms (item 1 to 4, 6 to 14) submitted on or before 31 January 2013 can be accepted.
 - Old version of Direct Debit Authorization Agreement (*For AXAHK use only*) (item 5) submitted on or before 14 January 2013 can be accepted

B. Payment Arrangement

1. Cheque Payment

Old Payee Name	New Payee Name
AXA (Hong Kong) Life Insurance Company Limited	AXA China Region Insurance

- Transitional Period - Cheque with new payee name will be effective today and cheque with old payee name will be accepted till 30 Jun 2013.

2. Cash Deposit or Account Transfer to AXA's Bank Account

Client may use account transfer or cash deposit to following banks:

Name of Bank	HK Dollar Account	US Dollar Account
HSBC	004-499-000966006	004-499-000966201
Bank of China	012-875-00317977	012-875-08006336

Remark:-

Original Deposit Slip or Transaction Advice Slip must be returned to Cashier
We do not accept any cheque bank into above bank accounts.

3. Large Cash Payment Declaration Form (Form Code: CDS002-1107)

- For all incoming payment effective today, Large Cash Payment Declaration Form will be ceased.

C. Life eService enhanced service (NOT applicable to AXAHK policies)

Life eServices will be applied automatically if customer provides his/her email address on the following forms.

- Absolute Assignment
- Policy Service Application Form I
- Application/Change/Termination of Trust Form
- Application For Change Of Customer Contract Details & Life eService

致各大經銷商：

為配合安盛(香港)人壽保險有限公司的長期業務轉讓予安盛保險(百慕達)有限公司，以下相關營運更改於即日起生效。

甲、新修訂的保單行政申請書

1. 主要更改

- 移除公司名稱「安盛（香港）人壽保險有限公司」。
- 新增部分「增更改項目申請」於大部份申請表格內，客戶必須於更改項目的空格內加上「✓」號。
- 新增「身故賠償選項」於「投資連繫式保單多項服務申請書」(LFPA008 -1212)申請下降選項至「固定賠償」。

2. 表格列表

項目號碼	舊表格編號	新表格編號	表格名稱
1	LFPA008-1205	LFPA008-1212	投資連繫式保單多項服務申請書
2	LFPA011-1205	LFPA011-1212	提取保單價值 / 保單貸款申請書
3	LFPA012-1205	LFPA012-1212	保單服務申請書 I
4	LFPA015-1205	LFPA015-1212	客戶聯絡資料更改及人壽保險網上服務申請書
5	PS-DDAAGR-1111	PS-DDAAGR-1212	直接付款授權書 (只適用於AXAHK保單)
6	CS001-1107	CS001-1212	第三者付款聲明書
7	LFUW058-1205	LFUW058-1212	保單服務申請書 II
8	LFPA003-1205	LFPA003-1212	以保單作為抵押品的協議及轉讓書
9	LFPA004-1204	LFPA004-1212	絕對轉讓書
10	LFPA010-1205	LFPA010-1212	AXA 駿峰年金投資保障計劃多項服務申請書
11	LFPA013-1205	LFPA013-1212	申請 / 更改 / 終止信託書
12	LFPA014-1205	LFPA014-1212	盛峰投資保險計劃多項服務申請書
13	LFPA016-1204	LFPA016-1212	資料補充 - 持有人為公司團體專用
14	LFPS003-1205	LFPS003-1212	終止保單申請書

3. 表格派送安排

- 可由 AWB 下載有關表格，客戶需於下載版表格每頁簽署。
- 印刷版表格可透過客戶經理或我們之銷售支援隊伍聯絡訂取。

4. 表格生效日期及過渡期

- 生效日期：即日
- 過渡期：
 - 舊版本的保單行政申請表格(項目號碼1至4, 6至14)將可遞交至2013年1月31日。
 - 舊版本的直接付款授權書(只適用於AXAHK保單) (項目號碼5) 必需於2013年1月14日或以前遞交。

乙、保費繳付安排

1. 支票付款

舊祈付名稱	新祈付名稱
安盛(香港)人壽保險有限公司	安盛保險(百慕達)有限公司

- 過渡期 — 新支票付款祈付名稱於2012年12月31日生效及舊抬頭名稱簽發的支票只接受至2013年6月30日。

2. 現金存款或帳戶轉賬至AXA銀行帳戶

客戶可以透過以下銀行以現金或戶口轉帳到 AXA：

銀行名稱	港幣存款戶口	美元存款戶口
香港上海滙豐銀行	004-499-000966006	004-499-000966201
中國銀行	012-875-00317977	012-875-08006336

備註

- 每個交易均需將存款單或交易通知書正本交回繳費處辦理。
- 不接受支直接存入上述帳戶內。

3. 大額付款聲明書 (CDS002-1107)

- 由即日起取消大額付款聲明書, 此變更亦適用所有遞交之繳費。

丙、人壽保險網上服務 – 服務優化 (不適用於AXAHK保單)

由2012年12月31日起，如客戶於下列申請表格提供電郵地址，人壽保險網上服務將自動申請：

- 絕對轉讓書
- 保單服務申請書 I
- 申請 / 更改 / 終止信託書
- 客戶聯絡資料更改及人壽保險網上服務申請書

Any enquiries, please feel free to contact your Relationship Manager or FI hotline on 2519 1133.
如有任何疑問，歡迎與您的客戶經理或我們之銷售支援隊伍聯絡 (2519 1133)。

Administration 行政			
Life Products – New Business 人壽保險產品 – 新生意	Steve Chui Jessica Tong	2519 1203 2519 1933	steve.chui@axa.com.hk jessica.tong@axa.com.hk
Client Administration, e-services 客戶行政、網上服務	Vicky Leung	2519 1365	vicky.leung@axa.com.hk
General enquiries, Suggestions / Complaints 一般查詢、意見及投訴	Agnes Lee	2519 1103	agnes.wy.lee@axa.com.hk
Evolution – All enquiries 有關Evolution的查詢		2802 2832 (then Press 3)	evolution@axa.com.hk

Yours faithfully,



Eddie Fung
Head of Financial Intermediaries