

【 備 忘 錄 】

檔案編號 : UWD-2013-MO14R-IB-HK
日期 : 2013 年 3 月 14 日
收件人 : 香港區各特許分銷商
發件人 : 核保部高級副總裁 Sammy Ho
有關事項 : 新增「個人資料收集聲明」表格(G42-PICS)

就公司於 2013 年 3 月 8 日發出新增「個人資料收集聲明」表格的備忘錄 UWD-2013-MO14-IB-HK，有以下修訂：

有關「保單服務(POS)」部份

由 3 月 18 日開始，如更改保單持有人／更改電話及電郵地址之申請並未有附上「個人資料收集聲明」表格，保戶服務部仍然會根據客戶之要求批核有關之申請。惟我們將視該客戶拒絕公司使用其個人資料作直接促銷用途。如經紀顧問欲於日後使用該客戶的個人資料作直接促銷用途，必須自行要求客戶簽妥直接促銷確認聲明，確保符合有關法例之規定。

有關「重要事項」部份

由於公司必須於取得客戶同意之後方可使用、保存及處理其個人資料，因此，經紀顧問必須於客戶簽妥個人資料收集聲明(例如 G42-PICS 表格或投保申請書)後，方可為客戶安排進行任何驗身程序。若公司收到客戶的驗身報告後之十四天內仍未收到上述文件(請注意：客戶簽署該文件日期必須在進行驗身程序前或當天；否則，該聲明不獲接納)，公司必須根據個人資料收集聲明的指引，注銷整份驗身／化驗報告，並且不作存檔。若客戶隨後才遞交投保申請書及 G42-PICS 表格，顧問便需為客戶安排重驗該等項目，並須負責支付該等費用。

請即通知各顧問有關上述事宜。如對上述事項有任何疑問，歡迎致電企業營銷部熱線 2919-9100 查詢。



核保部高級副總裁
Sammy Ho 謹啟

OFFICE MEMORANDUM

Reference No. : UWD-2013-MO14R-IB-HK
Date : Mar 14, 2013
To : All Franchised Agency / Brokers (Hong Kong)
From : Sammy Ho
Re : New Personal Information Collection Statement (G42-PICS)

With reference to Office Memorandum UWD-2013-MO14-IB-HK, issued on March 8, 2013 regarding the admin procedures to be followed when using the new Personal Information Collection Statement (G42-PICS), please note that we have now made the following amendments:

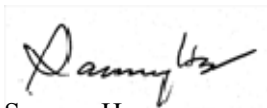
For the section of ‘Policy Owner Service (POS)’

Starting from March 18, 2013, for Change of Ownership / Change of Telephone Number / Change of email address, if Form G42-PICS is not attached to the mentioned service requests, POS will still approve the changes as requested by clients. However, we will assume that clients do not agree that we use their personal data for the purposes of direct marketing. If consultants would like to use the personal data of such clients for the purposes of direct marketing, they should arrange for the client to sign a declaration approving direct marketing by consultants themselves, to ensure that all direct-marketing activities comply with the new Guidance.

For the section of ‘Important Notes’

The Company should obtain client’s consent before collecting, maintaining and retaining their personal data. Consultants should therefore ask proposed clients to sign the Personal Information Collection Statement (e.g. Form G42-PICS or application form) before sending them for any medical exams. If the Company has received the medical reports on our proposed clients but does not receive their application form or G42-PICS within the next fourteen working days (the sign date of the above mentioned documents must be on or before the date of client undergo medical exam, otherwise, the document will not be accepted), the Company will follow the PCPD’s guidelines to erase and destroy their medical reports. The Company/Consultants are not allowed to retain these reports. If clients submit their applications and G42-PICS after the Company has deleted their previous medical records, consultants should arrange for clients to undergo the same medical exams again at consultant’s own cost.

Please download this message to your office. We will post this memorandum on the AES within the next three days for your reference. Should you have any queries, please feel free to contact Institutional Business Department at 2919-9100.



Sammy Ho
SVP, Underwriting