

## 商業財政問卷 BUSINESS FINANCIAL QUESTIONNAIRE

(準)受保人姓名 Name of (Proposed) Insured	(準)保單持有人姓名 Name of (Proposed) Policyholder	要保書/保單編號 Application/Policy No.
保險中介人姓名 Insurance Intermediary's Name	保險中介人註冊編號 Insurance Intermediary's Registration Code	分行/中介人編號 Branch/ Intermediary's Code

此問卷應由(準)保單持有人填寫 This statement should be completed by the (Proposed) Policyholder

1. 投保人壽保險的目的是什麼? What is/are the purpose(s) of this insurance application?
2. (準)受保人是否擁有或正向任何保險公司投保人壽或危疾保障? 若是, 請註明保險公司名稱、壽險種類、保障額及幣值。  
Does the (Proposed) Insured have in force or is the (Proposed) Insured applying for life or critical illness insurance with any insurance company? If Yes, please state the insurance company's name, insurance type and amount with currency.
3. (準)保單持有人的業務性質?  
What is the business nature of the (Proposed) Policyholder?
4. (準)保單持有人已營運的時間?  
For how long has the (Proposed) Policyholder been in operation?
5. 在過去三年內, (準)保單持有人的營業額、毛、淨利潤? (請提供已審核之數目)  
What are (Proposed) Policyholder's business turnover, gross and net profits over the past 3 years? (Please provide audited amount if available)
6. (準)保單持有人之資產狀況(包括流動資產總值、債務金額、流動資產總淨值及資產總淨值)? The financial details of the (Proposed) Policyholder (including total liquid assets, total liabilities, total net liquid assets and total net assets)?
7. 如果是屬於借款保障的, 請回答下列問題。(請提供一份借款合同副本)  
Please answer the following question if loan protection is the purpose of insurance application. Please provide a copy of the loan agreement)
  - a) 借款目的及借款金額?  
The objective of the loan and amount of the loan?
  - b) 借款的期限及還款條件?  
The duration and repayment conditions?
  - c) 借出者及借款者姓名/名稱?  
The names of the lender and the borrower?
  - d) 投保壽險是否借款的條件及會否立即安排貸款?  
Whether the issue of a life policy is condition of the loan and if immediate assignment will be arranged?
  - e) 有沒有其它現存的借款? 如有, 請詳述。  
Whether any other loans already existed? If yes, please provide details.

8. 如果是投保“要員保險”，請回答下列問題。

Please answer the following question if “keyman” insurance is the purpose of the application.

- a) (準)受保人為什麼是“要員”？  
Why is the (Proposed) Insured considered a “keyman”?
- b) 計算投保金額的基礎是什麼？  
The basis upon which the sum insured is calculated?
- c) 該“要員”是否持有該公司股份？如有，佔有多少百分比？  
Whether the “keyman” is a shareholder of the company and if yes, what percentage of the total shares owned?
- d) 該“要員”已為公司工作了多長時間？  
For how long has the “keyman” been working for the company?
- e) 選擇這種形式及期間的保單的原因？  
The reason for selecting this type and duration of policy?

9. 如果屬合夥人或合股人投保，請回答下列問題。

Please answer the following questions if partnership insurance is the purpose of application.

- a) (準)受保人擁有該公司 / 合夥的股份百分比？  
What percentage of the company's shares / partnership does the (Proposed) insured own?
- b) 倘(準)受保人去世，將會發生多少負債？如果有一份“買及賣”的協議書，請提供副本。What liability arises on the death of the(Proposed)Insured? If a “Buy and sell” agreement exists, please provide a copy.
- c) (準)保單持有人及(準)受保人的關係？  
What relationship exists between the (Proposed) Policyholder and the (Proposed) insured?
- a) 投放在業務上的價值為多少？請提出按什麼基礎計算。  
What value has been placed on the business? Please give details about the basis on which the valuation is calculated。
- e) 對所有股票持有人 / 合夥人都投保？如否，請解釋原因。  
Whether policies are being applied on the lives of all shareholders / partners? If no, please explain.
10. 如屬僱員福利投保，請回答：(準)保單持有人是否為所有相同職級員工投保相同保險金額？如否，請解釋原因。Please answer if employee benefit is the purpose of the application “Is it true that the (Proposed) Policyholder has applied or is applying equivalent insurance amount for all employee(s) of similar position? If no, please explain.

#### 個人資料收集聲明 PERSONAL INFORMATION COLLECTION STATEMENT

本人/我們確認已閱讀及明白「中國人壽保險(海外)股份有限公司」的收集個人資料聲明。有關最新版本的收集個人資料聲明，可於 [www.chinalife.com.hk](http://www.chinalife.com.hk) 下載或向中國人壽保險(海外)股份有限公司索取。I/We confirm that I/we have read and understood Personal Information Collection Statement (“PICS”) of China Life Insurance (Overseas) Company Limited. For the latest version of PICS, it can be downloaded from [www.chinalife.com.hk](http://www.chinalife.com.hk) or is made available upon request.

#### 聲明 DECLARATIONS

本人/我們謹此聲明，本人/我們所以上陳述為事實之全部，並同意該等陳述將作為本人/我們致中國人壽保險(海外)股份有限公司的上述要保書一部份。如有任何不正確或虛報資料，繕發之保單將根據貴公司的選擇而無效或可使無效。  
I/We declare that the above statements are full, complete and true, and agree that they shall form part of my/our application above mentioned to China Life Insurance (Overseas) Company Limited and that any untrue or inaccurate statement shall render the policy issued may be void or voidable at the option of the Company.

保險中介人簽署

(準)保單持有人簽署  
Proposed Policyholder's Signature

(準)受保人簽署 (若年齡在 18 歲或以上)  
Proposed Insured's Signature (If age 18 or above)

年 Year / 月 Month / 日 Day  
2 / 2

