

StudySmart+ Overseas Student Insurance Plan enrollment form 「智學保+」海外留學保險計劃 投保表格

For internal use only
只供內部使用

Agent name
代理人姓名: _____

Agent no.
代理人編號: _____

Enquiry no. 查詢電話: +852 2903 9391 Fax 傳真: +852 2968 0639

Please ✓ the appropriate box and * delete where inappropriate. 請 ✓ 適用方格及於*號刪去不適用者。

All fields are mandatory. Please complete in BLOCK LETTERS. 所有項目必須填報, 請以英文正楷大寫填報。

1. Applicant information 投保人資料

Mr. 先生 Mrs. 太太 Ms. 女士 Last name 姓

First name 名

Chinese name 中文姓名

Date of birth 出生日期 Day日 Month月 Year年

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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HKID card no. 香港身份證號碼

Marital status 婚姻狀況

Mobile phone no. 流動電話號碼

Day time telephone no. 日間聯絡電話

Email address 電郵地址

Correspondence address 通訊地址
Flat/Room 室 / 單位

Floor 樓

Block 座

Building 大廈

Estate name/No. & name of street/Lot no.
屋苑名稱 / 街名及門牌 / 地段

District 地區

HK/KLN/NT*
香港 / 九龍 / 新界*

2. Insured person's information 受保人資料

Enroll Full Year Study Plan¹ 投保全年留學計劃¹

Mr. 先生 Ms. 女士 Last name 姓

First name 名

Chinese name 中文姓名

Date of birth 出生日期 Day日 Month月 Year年

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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HKID card no. /Passport no. 香港身份證號碼 / 護照號碼*

Relationship with applicant 與投保人關係

Select your plan¹ 計劃選擇¹

Basic Plan 基本計劃

Advanced Plan 專上計劃

¹ Full Year Study Plans are limited to 1 insured person per policy.
全年留學計劃每份保單只限一位受保人。

Select plan duration 計劃年期選擇

1-year-plan 1年計劃

2-year-plan 2年計劃

Country of study 留學國家

Effective date 生效日期

Day日 Month月 Year年

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Premium (HKD) 保費 (港元)

2. Insured person's information (continued) 受保人資料 (續)

Enroll Short-term Study Plan 投保短期課程計劃

If more than four insured persons apply for this plan, please photocopy and complete this section for each of the additional insured person(s).
如多於四位受保人申請此計劃，請自行複印受保人資料之部分並為每位額外受保人填寫。

	Insured person 受保人1	Insured person 受保人2	Insured person 受保人3	Insured person 受保人4
Last name 姓				
First name 名				
Chinese name 中文姓名				
Gender 性別	<input type="checkbox"/> Male 男 <input type="checkbox"/> Female 女	<input type="checkbox"/> Male 男 <input type="checkbox"/> Female 女	<input type="checkbox"/> Male 男 <input type="checkbox"/> Female 女	<input type="checkbox"/> Male 男 <input type="checkbox"/> Female 女
Relationship with applicant 與投保人關係				
HKID card no./Passport no.* 香港身份證號碼/護照號碼*				
Date of birth 出生日期	Day日 Month月 Year年 □□□□□□□□	Day日 Month月 Year年 □□□□□□□□	Day日 Month月 Year年 □□□□□□□□	Day日 Month月 Year年 □□□□□□□□
Period of travel ² 旅遊期限 ²	From 由 Day日 Month月 Year年 □□□□□□□□		To 至 Day日 Month月 Year年 □□□□□□□□	
Duration 保障期	<input type="checkbox"/> 2 months 2 個月		<input type="checkbox"/> 4 months 4 個月	
Country of Study 留學國家				
Premium (HKD) 保費 (港元)				

² Both days included, maximum period of insurance is six months. The period of travel must be the same for all insured persons under the same policy.
上列兩日包括在內，最長保障期限為六個月。同一份保單之所有受保人的旅遊期限必須相同。

Total premium payable (HKD)
應付保費總額 (港元)

3. Payment method 付款方法

Credit card type 信用卡類別



Cardholder's name

持卡人姓名

Credit card no.

信用卡號碼

Credit card expiry date Month月 Year年

信用卡有效日期至

□□□□□□

The cardholder hereby authorizes Zurich Insurance Company Ltd to charge automatically the premium due from his/her credit card stated above including subsequent premium payment for renewal of the policy of the selected insurance plan, and accepts full responsibility for any overdraft on his/her credit card which arises as a result of such transfer. For the continuation of coverage, the cardholder understands that he/she should arrange sufficient credit balance in his/her credit card by the premium due date for the automatic debit of premium.

The insured person(s) will become the policyholder for his/her insurance plan automatically at policy anniversary should the insured person(s) reached the age of 18 and will be charged with the corresponding renewal premium in accordance with the premium table. Zurich Insurance Company Ltd will collect the renewal premium from the same payment account as stated above on due dates, unless informed otherwise.

持卡人茲授權蘇黎世保險有限公司從他/她上述之信用卡以直接轉帳自動支付應繳保費金額包括往後續保的各期保費及同意因該等轉帳而令他/她信用卡出現透支，持卡人願承擔全部責任。為了持續的保費，持卡人明白他/她需於保費到期日前安排足夠的信貸餘額於他/她的信用卡上作保費自動轉帳之用。

如受保人於保單週年日時已年滿18歲，便會自動成為其保單的保單持有人，並會根據保費表收取相應的續保費用。蘇黎世保險有限公司將繼續於到期日時在以上付款帳戶收取續保保費，直至另行通知。

If credit cardholder is not the applicant, please state the relationship between the credit cardholder and the applicant

若信用卡持有人並非投保人，請列明信用卡持有人與投保人的關係

Signature of Credit cardholder
信用卡持卡人簽署

Day日 Month月 Year年

Date
日期

□□□□□□□□

4. Declaration 聲明

1. I/We hereby apply for StudySmart+ Overseas Student Insurance Plan ("this Plan"). I/We declare that to the best of my/our knowledge and belief the information given on this enrollment form is true and complete in every respect and all information disclosed have been verified by me/us as true and correct, and that no insured person listed hereon is travelling against the advice of any medical practitioner or for the purpose of obtaining medical or surgical treatment of such person. Where applicable, I/we declare that I/we have full and complete authority from the insured person(s) to submit on their behalf this application and to disclose any personal information being requested to assess this application. I/We agree that this enrollment form and declaration shall form the basis of the contract between me/us and Zurich Insurance Company Ltd ("the Company").
本人 / 我們現投保「智學保+」海外留學保險計劃（「此計劃」）。本人 / 我們謹此聲明本投保表格所列全部資料乃就本人 / 我們所知一切據實填報，並經本人 / 吾等核實正確無誤。上述受保人是次出外旅遊並未違背專業醫生勸告或以為受保人尋求醫療或手術治療為目的。在適用的情況下，本人 / 我們聲明本人 / 我們已獲受保人授予全權代為遞交此投保表格並披露所要求的任何個人資料，以作評估申請之用。本人 / 我們明白本投保表格及聲明將構成本人 / 我們與蘇黎世保險有限公司（「貴公司」）之間的合約依據。
2. I/We understand that I/we shall refer to the policy of this Plan for details of the insurance coverage, exclusion clauses and terms and conditions.
本人 / 我們明白所有保障範圍、不承保事項、條款及細則概以此計劃保單為準。
3. I/We understand I/we must complete and provide all information requested in this form, failing which the Company cannot process my/our application for this Plan.
本人 / 我們明白本人 / 我們必須完成及提供此表格之所有資料，貴公司將不會受理本人 / 我們資料不全之保單申請。
4. I/We authorize the Company to obtain the necessary medical information from the insured person's medical practitioner(s) and I/we agree to supply additional information relevant to the policy of this Plan at my/our own expense.
本人 / 我們授權 貴公司有權向受保人之醫生索取所需之病歷資料。本人 / 我們亦同意提供任何進一步與此計劃有關之資料，並自付所需費用。
5. I/We declare that the insured person(s) is/are in good health and free from physical and mental impairment or deformity.
本人 / 我們聲明受保人現在生理 / 心理健全，並無任何殘障或缺陷。
6. I/We hereby authorize any company within the Zurich Insurance Group which is in possession of my/our personal information to release part or all of the information to the Company or its agents.
本人 / 我們特此授權蘇黎世保險集團中任何持有本人 / 我們個人資料的公司提供部分或全部資料予 貴公司或其代理人。

This insurance application will not be in force until it has been accepted by the Company and the premium has been paid.
此保險申請須待 貴公司覆核，接納投保書及繳訖保費後才能生效。

5. Notice to customers relating to the Personal Data (Privacy) Ordinance ("Ordinance") 有關個人資料（私隱）條例（「私隱條例」）的客戶通知

The personal information of customers (including policyholders, insured persons, beneficiaries, premium payors, trustees, policy assignees and claimants) collected or held by **Zurich Insurance Company Ltd ("Company")** from time to time, which also includes data collected or generated in the ordinary course of the Company's business and the continuation of relationship with the customer (such as claim information and medical history received from third parties), may be used by the Company and/or a company within its group ("**Zurich Insurance Group**") for the purposes **necessary** in providing services to the customers (otherwise the Company is unable to provide services to customers who fail to provide the required information).
由蘇黎世保險有限公司（「本公司」）不時收集或持有的客戶（包括保單持有人、受保人、受益人、保費付款人、信託人、保單受讓人及索償人）個人資料，其中亦包括在公司日常業務過程中以及就持續與客戶的關係而收集或產生的資料（例如從第三方收到的索償資料和病歷），均可供本公司及 / 或其所屬集團（「蘇黎世保險集團」）內的公司使用作為向客戶提供服務而必須的用途（否則本公司將無法為未能提供所需資料的客戶提供服務）。

Please read carefully the details of the Company's privacy policy which is made available on our website at www.zurich.com.hk/pics or by scanning the QR code. You may also contact our Customer Care Center at 2968 2288 or insurance intermediaries for enquires. 本公司之私隱政策詳載於www.zurich.com.hk/pics或可透過掃描QR碼細閱。您亦可致電2968 2288與我們的客戶服務中心聯絡或向保險中介人查詢。



Consent for marketing purposes - Voluntary: 就市場推廣用途之同意 – 自願性：

Certain personal information of policyholders and insured persons collected or held by the Company (which also includes data collected or generated in the ordinary course of the Company's business and the continuation of relationship with the customer), in particular, names, contact information, age, gender, identity document reference, marital status, financial background, demographic data, transaction pattern and behavior, policy information, claim information, and medical history may be used by the Company, **only upon having such policyholders' or insured persons' consent or indication of no objection**, for providing marketing materials and conducting direct marketing activities in relation to insurance and/or financial products and services of the Zurich Insurance Group and/or other financial services providers, and/or other related services of business partners, with whom the Company maintains business referral or other arrangements (such as reward, loyalty, co-branding or privileges programs and related services and products, services and products offered by the Company's business or co-branding partners, donations or contributions for charitable and/or non-profit making purposes). For the avoidance of doubt, the latest instruction (for example, consent or indication of no objection, or request for opt-out) received from a customer shall override any previous instruction given to the Company in this regard in relation to all personal information of the customer collected or held by the Company from time to time.

由本公司收集或持有的保單持有人及受保人的某些個人資料（其中亦包括在本公司日常業務過程中以及就持續與客戶的關係收集或產生的資料），特別是姓名、聯絡資料、年齡、性別、身份證明文件資料、婚姻狀況、經濟背景、人口統計數據、交易模式和行為、保單資料、索償資料及醫療紀錄等，**於獲該保單持有人或受保人同意或作不反對指示後**，均可供本公司使用作為蘇黎世保險集團及 / 或與本公司維持業務引薦關係或其他安排之其他金融服務供應商的保險及 / 或金融產品及服務，及 / 或其他商業合作夥伴之相關服務，提供市場推廣資料及進行直接市場推廣活動。（例如獎賞、忠誠獎勵、合作品牌或優惠計劃以及相關服務和產品，由本公司商業合作夥伴或合作品牌夥伴提供的服務和產品，出於慈善及 / 或非牟利目的的捐贈或捐款）。為免生疑問，就本公司不時收集或持有的所有客戶個人資料，本公司將會以從客戶收到的最新指示（例如同意或表示不反對的指示，或提出反對要求）。

5. Notice to customers relating to the Personal Data (Privacy) Ordinance (“Ordinance”) (continued) 有關個人資料 (私隱) 條例 (「私隱條例」) 的客戶通知 (續)

The Company may provide (and may receive money or property in return for providing) certain personal information, in particular, name, contact information, age, gender and policy information of a policyholder and an insured person, **only upon having such policyholder's and insured person's written consent**, to be used by the following parties, within or outside of Hong Kong, for their own and/or the Company's **marketing purposes** set out above:

- (1) companies within the Zurich Insurance Group;
- (2) other banking/financial institutions, commercial or charitable organizations with whom the Company maintains business referral or other arrangements;
- (3) third party reward, loyalty, co-branding or privileges program providers;
- (4) third party marketing service providers and insurance intermediaries.

於獲保單持有人及受保人書面同意後，本公司方可就以下人士本身及 / 或就本公司的**市場推廣用途**，向以下於香港境內或境外的人士提供其某些個人資料 (並可能收到金錢或其他財產作為回報)，特別是姓名、聯絡資料、年齡、性別、保單持有人及受保人的保單資料等，以供其使用：

- (1) 蘇黎世保險集團成員公司；
- (2) 與本公司維持業務引薦關係或其他安排的其他銀行 / 金融機構、商業或慈善組織；
- (3) 第三方獎賞、忠誠獎勵、合作品牌或優惠計劃提供者；
- (4) 第三方市場推廣相關服務供應商及保險中介人。

I/We understand that I/we can withdraw any consent provided for marketing purposes anytime by notice to the Company.

本人 / 我們明白可隨時通知 貴公司以撤回任何就市場推廣用途所給予之同意。

I/We do not agree to the use or transfer of my/our personal data for marketing purposes as set out above.

本人 / 我們不同意 貴公司使用或向第三方提供本人 / 我們的個人資料作上列市場推廣用途。

I/We confirm that all information provided by me/us in this enrollment form is true, correct and accurate. I/We further confirm my/our agreement to all sections in this enrollment form, including without limitation, the above Declaration and the Notice to Customers relating to the Personal Data (Privacy) Ordinance.

本人 / 我們確認由本人 / 我們於此投保表格提供之所有資料均為事實正確無誤。本人 / 我們更確認同意本投保表格內之所有部分，包括但不限於上列之聲明及有關個人資料 (私隱) 條例的客戶通知。

Signature of applicant

投保人簽署

Day日 Month月 Year年

Date
日期

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Remarks:

We acknowledge and confirm that we have read through and understand all related terms and conditions as stated on this application and we hereby agree to accept this application and appoint "SCF Insurance Management Limited" as our insurance agent to arrange this insurance policy. SCF Insurance Management Limited, an agency of Zurich Insurance Company Limited, will be responsible for providing relevant administrative services, including but not limited to client enquiry service, quotation document preparation, policy administration, to Clients introduced by Sun Life Individual Insurance Agent (with General Insurance License) in respect of the selected insurance products.