

保單持有人
Name of Policy Holder

☐ 先生 Mr. ☐ 博士 Dr.
☐ 女仕 Ms. ☐ 小姐 Miss.

發行保險公司
Life Insurance Issuer

捐贈保單編號
Donated Insurance Policy No.

更改受益人資料生效日期
Effective Date of Beneficiary's
Information Change

受益慈善機構 Name of Charitable Institution	公司註冊編號 Beneficiary's CR No.	捐贈百分比 % of Donation	捐贈保額總值 ⁽¹⁾ Total Amount of Donated Sum Insured
		%	\$

(1) 捐贈保額總值將以更改受益人資料生效日，人壽保單內的身故賠償額/年金的現金價值 x 捐贈百分比計算。

Total Amount of Donated Sum Insured is calculated according to the death benefit of life insurance / cash value of annuity x percentage of donation on the effective date of beneficiary's information

聯絡電子郵箱
Email Address

本人在此聲明於意願書中披露的內容均盡力確保準確可信，同意將內容經匿名化處理後，製備統計資料促進公眾利益。
I hereby declare that to the best of my knowledge and belief, the information provided above are accurate and credible, and agree to release the relevant statistical information to promote public interest after the process of removing personal identifiers.

保險中介人資料 Insurance Intermediary

協助完成相關捐贈安排的保險中介人資料

Information on insurance intermediaries who assisted in completing relevant policy donation arrangements

持牌保險中介人姓名
Name of Licensed Insurance
Intermediary

登記編號
Insurance Intermediary
Licence No

所屬保險公司
Insurance Company

查閱持牌保險中介人登記冊 (個人)
Please Check Register of Licensed Insurance Intermediaries (Individual)
<https://iir.la.org.hk/#/search/individual>

營業區域/直屬團隊
District/Agency Name/
Direct Team

分區名稱
Branch Name

分組名稱
Unit Name

保險中介人手提電話
Mobile No.

保險中介人電郵
Email Address

意願書遞交方法 Methods of Submission



2570 1525



lifecare@luaf.org.hk

保單捐贈人 | 生命傳愛大使提名人 簽署
Signature of Policy Donor | Nominator of LifeCare Ambassador

日期 YY/MM/DD
Signed Date



保單捐贈嘉許計劃 - 生命傳愛大使提名

Nomination Form of Policy Donation Recognition Program - LifeCare Ambassador



本人希望 *提名以上持牌保險中介人為保單捐贈嘉許計劃 - 生命傳愛大使。

I wish to nominate* the mentioned licensed insurance intermediary to be LifeCare Ambassador of Policy Donation Recognition Program.

提名嘉許級別
Award Nomination

現屆保協會員
Current LUAFK Member

☐ 是 Yes ☐ 否 No

 LIFECARE AMBASSADOR 生命傳愛大使	 LIFECARE LEADER 生命傳愛領袖	 LIFECARE MASTER 生命傳愛大師
☐ 生命傳愛大使 LifeCare Ambassador	☐ 生命傳愛領袖 LifeCare Leader	☐ 生命傳愛大師 LifeCare Master

保單捐贈意願書 - 常問問題

FAQ of Policy Donation Pledge Form

什麼是保單捐贈意願書？

保單捐贈意願書是一份須由保單持有人親簽的文件，表達保單捐贈的意願，但並不具法律效力。

保單捐贈意願書有什麼用途？

資料經內部處理後，主要用作下兩大用途。

1. 製作年度保單捐贈統計予公眾及慈善機構參考，共同推動保單捐贈文化。
2. 表揚出心力的保險從業人員，推廣保單捐贈不遺餘力。

是否必須遞交保單捐贈意願書？

不是。遞交保單捐贈意願書屬自願性質，不具法律約束。保單持有人有權自行決定隨時要求更改或取消已遞交的保單捐贈意願書。

慈善機構如何得知已成為保單受益人？

保單受益人屬保單持有人的個人私隱。因此，除非由保單持有人主動通知慈善機構，或透過保單捐贈意願書同意披露相關範圍資料，否則一般情況，慈善機構未必得知自己已成為保單受益人，與一般受益人情況相同。

什麼是保單捐贈嘉許計劃？

為表揚表現突出的財務策劃顧問，生命傳愛行動每年均會舉辦嘉許禮感謝他們在工作中不忘義務付出，關心社會事務，和不同社群的福祉。他們代表著對社會有所承擔，關懷社會，並願意作出貢獻的公民。

What is Policy Donation Pledge?

Policy Donation Pledge is a non-legal binding document to be submitted by policyholder who intends to record his/her wish to donate policy(s) after death.

What is Policy Donation Pledge for ?

After the content is anonymized, it serves for two major purposes.

1. To develop "Annual Statistics of Policy Donation" as a reference for both public & third sector.
2. To recognize insurance intermediaries who have given his/her best to promote policy donation, cultivating our society with a caring culture.

Is it compulsory to submit?

No, it's not. Submission of a Policy Donation Pledge Form is entirely voluntary. It is neither a contract, nor it is legally binding. The policyholder always has the right to request to amend or cancel the Policy Donation Pledge Form at any time on his/her own decision.

Would the charity receive notification upon the change of beneficiary ?

The designation of beneficiary is the privacy of policyholder. Unless the details is disclosed by the policyholder or the disclosure of fully anonymised personal data based on the consent signed on policy donation pledge by policyholder, charity would NOT be informed as a beneficiary upon the change. The term & condition is applied to all beneficiary(s).

What is PDP Recognition Program ?

Policy donation is made possible through the selfless contribution by our LifeCare Movement (LCM) Ambassadors, who deserved every single recognition for their voluntary services. We held an Annual LCM Policy Donation Recognition Ceremony as a grand event to express our appreciation to their outstanding performances.

聯絡我們 Contact Us

如有任何意見或查詢，歡迎致電或電郵與我們聯絡。

Any suggestions or enquiries, please contact us by phone or email.

(852) 2969 0200

lifecare@luaf.org.hk



保單捐贈 policydonation

主辦機構 Organizer

合辦機構 Co-Organizer



贊助機構 Sponsoring Organization

