



保單捐贈意願書

Policy Donation Pledge Form

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.ia.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

保單捐贈計劃 - 生命傳愛大使嘉許提名

Policy Donation Program - Nomination for LifeCare Ambassador Recognition

本人希望 *提名以上持牌保險中介人嘉許成為保單捐贈計劃 - 生命傳愛大使。
I wish to nominate *the mentioned licensed insurance intermediary to be awarded as LifeCare Ambassador of Policy Donation Program.

提名嘉許級別 Award Nomination			
現屆保協會員 Current LUAHK Member	☐ 生命傳愛大使 LifeCare Ambassador	☐ 生命傳愛領袖 LifeCare Leader	☐ 生命傳愛大師 LifeCare Master
☐ 是 Yes ☐ 否 No			



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。
2. 表揚出心出力的保險從業人員，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。

什麼是保單捐贈計劃-生命傳愛大使嘉許？

為表揚表現突出的財務策劃顧問，**生命傳愛行動**每年均會嘉許由客戶提名的生命傳愛大使，以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，對社會有所承擔。

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



策略伙伴
Strategic Partner



全力支持
With Full Support



贊助機構 Sponsoring Organization



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Manulife 宏利



英國保誠



Sun Life
永明金融



萬通保險

雲鋒金融集團成員



www.policydonation.org.hk

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 policy 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 Policy Donation Program - LifeCare Ambassador Nomination ?

Policy donation is made possible through the selfless contribution by our LifeCare Ambassadors, who deserve every single recognition for their voluntary services. **LifeCare Movement** holds an Annual Policy Donation Program Recognition Ceremony as a grand event to express our appreciation to the nominated financial planners for their outstanding performances.

收集個人資料用途聲明

Statement of Purposes for Collection of Personal Data

1. 你是自願向中央保單捐贈資料庫提供保單捐贈的資料。所有收集於保單捐贈資料庫的資料會被視作個人資料，並絕對保密，只供已獲授權人士進行相關資料整理。
2. 保單捐贈資料庫的個人資料，主要由**香港人壽保險從業員協會慈善基金**內部使用。
3. 保單捐贈資料庫的個人資料將由收集日期起計保存一百零一年，或直至**香港人壽保險從業員協會慈善基金**得悉有關保單受保人士已去世為止，以較早者為準。
4. 如**香港人壽保險從業員協會慈善基金**在收到保單捐贈意願書後，未能成功與你聯絡以核實個人資料，或當你的個人資料已被輸入保單捐贈慈善基金後，相關的保單捐贈意願書將會被銷毀。
5. 根據《個人資料(私隱)條例》第18條和22條和附表1第6原則所述，你有權查閱和修正個人資料，包括有權取得你於以上第1段所述的情況下所提供的個人資料。**香港人壽保險從業員協會慈善基金**應查閱要求而提供資料時，可能會徵收費用。
1. Your pledge with the Centralised Policy Donation Database (CPDD) is a voluntary act. All collected data in the CPDD for the purpose of performing relevant data management.
2. Collected data in the CPDD are mainly for use within the LUA Foundation (LUAF).
3. Collected information in the CPDD will be retained for 100 years from the date of collection, or until the insured has been informed of the death of the person to whom the data refers, whichever is earlier.
4. The policy donation pledge forms submitted will be destroyed if LUA Foundation fails to establish contact with you for verification of information, or after your personal data have been inputted into the CPDD.
5. You have the right of access and correction with respect to your personal data as provided for in Sections 18 and 22 and Principle 6 of Schedule 1 of the Personal Data (Privacy) Ordinance. Your right of access includes the right to obtain a copy of your personal data provided by you on the occasions as mentioned in paragraph 1 above. A fee may be charged by LUA Foundation for complying with a data access request.