

## OIU 保單帳戶價值定期部分解約申請書

### OIU Policy Value Regular Partial Surrender Application

● 本表單之填寫請以英文為主，正體中文或簡體中文亦可；本表中英文與中文文義如有歧異時，以中文為準。  
 Please fill this form in English (traditional and simplified Chinese also acceptable). If any difference exists between the English and Chinese text, the Chinese text shall prevail.

要保人姓名： Policyholder		護照號碼： Passport number	
保單號碼： Policy number		申請日期： Application date	年 _____ 月 _____ 日 YYYY                      MM                      DD

**壹、申請辦理定期部分解約 / Application for regular partial surrender**

本人（即要保人）茲向宏泰人壽保險股份有限公司國際保險業務分公司（下簡稱貴公司）申請定期部分解約贖回保單帳戶價值，請貴公司依下列約定主動辦理，為避免雙方日後爭議，特立本申請書內容如下：

I (the policyholder) hereby apply to the Hontai Life Insurance Co., Ltd OIU (the Company) for regular partial surrender of the Policy Account Value. I hereby request that the Company will process my application based on the following information in this application to prevent any further disputes:

一、定期部分解約時間及金額 / Regular partial surrender schedule and value :

1. 自第一筆定期部分解約贖回日期起依以下週期辦理（如約定日期非營業日則順延至次一營業日辦理）：  
 After the redemption of the first partial surrender, all the future partial surrenders will be conducted in the following cycles (if the designated date does not fall on a business day, it shall be conducted on the following business day) :

每年 / Every year       每半年 / Every six months       每季 / Every quarter

2. 定期辦理部分解約贖回同保單幣別之金額  \_\_\_\_\_ 元，或  保單帳戶價值之 \_\_\_\_\_ %（最高限為 10% 且須為整數）；若贖回金額低於 600 元時則不予辦理，前述部分解約金額皆依辦理當時之投資標的等比例贖回。  
 For partial surrender of  \_\_\_\_\_ dollars (in policy currency) · or  \_\_\_\_\_ % of policy account value (10% at maximum and must be a round number). If the surrender value is less than 600 dollars, the surrender will not be processed. The partial surrenders above will be redeemed in the same percentages of investment objects as the original policy.

3. 請說明取回解約金之用途(Please explain the (economic) purpose for the policy termination/ surrender) :

投資理財(Investment)     繳稅(Tax expenses)     教育支出(education expenses)  
 消費性支出(consumer expenses)     醫療支出(Medical expenses)     裝修房屋(Home renovation expenses)  
 其他(Others) · 請簡要具體說明(Brief explanation) : \_\_\_\_\_

- 二、第一筆定期部分解約贖回日期指定為西元 \_\_\_\_\_ 年 \_\_\_\_\_ 月 15 日（須為契約生效日期或本申請書填寫日期 30 日後，該日如非營業日則順延至次一營業日辦理）；第一筆定期部分解約贖回款項將於指定日期後最近一次的 15 日辦理取消單位數，款項將於數日後匯至您的指定帳戶。

The first partial surrender redemption date is \_\_\_\_\_ (year) \_\_\_\_\_ (month) 15th, (must be 30 days after the issued-day of the contract or this application is filled. If not a business day, it will be processed on the following business day). The first partial surrender will be redeemed by cancellation of units on the 15th day of the month closest to the designated date and will be wired to your designated account a few days later.

- 三、給付方式：請貴公司每次將上開預定部分解約金額匯入本人指定之下列金融帳號：

Payment method: The Company shall wire the partial surrender to my designated account below:

受款銀行 Beneficiary's Bank	銀行及分行名稱(Bank and branch name) : _____ 受款銀行國家 (Country) : _____ 銀行代碼 : _____ (Swift Code)
受款人帳戶 Beneficiary (Policyholder)	帳戶名稱(Account name) : _____ <span style="color: red;">* The English name must match the Policyholder's name on his account opening letter.</span> 帳號(Account No.) : _____

四、聲明事項/Disclaimers:

1. 本人了解依條款約定，每次部分解約金額不得低於保單幣別 600 元整，且在部分解約時，保單帳戶價值剩餘的金額不可低於保單幣別 10,000 元整，或當時本人（要保人）若申請辦理解約（契約終止）應付解約費用之兩倍金額，取其高者。若在提出部分解約的申請後，剩餘保單帳戶價值低於上述金額時，貴公司將以剩餘之保單帳戶價值扣除應給付之費用後結清給付保單帳戶價值，契約效力即為終止。

I understand that according to the insurance policy provisions, each partial surrender must not be lower than 600 dollars (in policy currency) and that the remaining account value must not be lower than 10,000 dollars (in policy currency) at the time of partial surrender or, as I (policyholder) apply for surrender (termination of the contract), twice of the surrender charge (the higher one applies). If, after applying for partial surrender, the remaining account value is lower than the numbers above, the Company may deduct all related charges from the remaining account value before returning the remaining account value to me. At this time the contract's validity is terminated.

2. 本部分解約申請及作業、匯款相關費用等，皆依保單條款 6.4 節辦理。

All the fees related to this regular partial surrender application, processing and remittances will be charged pursuant to Condition 6.4 of the Policy Terms and Conditions.

3. 本人確已評估及了解部分解約可能蒙受之損失或契約效力之改變。

I have evaluated and understood the loss and change in the contract validity potentially caused by partial surrenders.

貳、變更定期部分解約之金額為 / Change the regular partial surrender value to :

\_\_\_\_\_ 元 ( 同保單幣別 ) · 或  帳戶價值之 \_\_\_\_\_ % ( 最高限為 10% 且須為整數 )。

\_\_\_\_\_ dollars (in policy currency) or  \_\_\_\_\_ % of the account value (10% at maximum and must be a round number).

參、終止定期部分解約之約定 / Termination of regular partial surrender

要保人簽名 / Signature of the Policyholder :	日期/Date : _____年____月____日 YYYY MM DD
法定代理人簽名 / Signature of the Legal Representative :	
係未成年者之 / Relationship of Policyholder/Insured : <input type="checkbox"/> 父親 / Father <input type="checkbox"/> 母親 / Mother <input type="checkbox"/> 其他 / Other : _____ ( 勾選其他者，請提供證明文件 / Check the other, please provide supporting documentation. )	

● 此申請書係本人輔導下填寫，並核對要保人 / 法定代理人身分無誤，且親視要保人及法定代理人親筆簽名，內容絕無隱瞞或不正確之情事，若有造成貴公司損害，願負賠償責任。  
This application was filled under my supervision. I have examined and confirmed the identities of the policyholder/legal representative and personally witnessed the policyholder and legal representative sign this document. All the information in this application is true and correct. I shall be liable for any damages to the Company as result of this application.

保經 / 代公司簽署人章： Signatory of the licensed intermediary company (stamp)	業務員簽名： Signature of the licensed intermediary	業務單位代號： Center code	受理章/日期： Acceptance stamp / date
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宏泰人壽保險股份有限公司 / Hontai Life Insurance Co., Ltd.	
經辦 / Person in charge :	受理日期 / Reception date :