

## Claim Form - Disability

## 傷殘保障申請書

Claim Type 賠償類別

- ☐ Waiver of Premium (WP) 豁免保費 ☐ Income Protection (DI/PIP/PIPS) 傷殘入息保障
- ☐ Child's Protection Benefit (CPB) 兒童保障利益
- ☐ Disability of CPB payor 兒童保障利益付款人傷殘
- ☐ Death of CPB payor 兒童保障利益付款人死亡
- Date of death 死亡日期 \_\_\_\_\_ Place of death 死亡地點 \_\_\_\_\_

<input type="checkbox"/> New claim 首次索償	<input type="checkbox"/> Pending claim 待決索償	<input type="checkbox"/> Further claim 再度索償	<input type="checkbox"/> Review/appeal 重批/覆核
Please provide claim no. for reference 請提供賠償編號以作參考			

## Part I (To Be Completed by Claimant/Insured) 甲部 (由索償人 / 受保人填寫)

A. Insured's Particulars 受保人資料						
Policy no. 保單編號	Insured's name (WP)/payor's name (CPB) 受保人姓名 (豁免保費) / 付款人姓名 (兒童保障利益)	HKID card/passport no. 香港身份證 / 護照號碼	Date of birth 出生日期 DD日MM月YYYY年 / /	Sex 性別	Age 年齡	Tel. no. 電話號碼
B. Employment Particulars 就業詳情						
1. Present occupation 現時職業	Duties 工作範圍	Employer's name, address & tel. no. 僱主名稱、地址及電話				

If more than one occupation, state all and exact nature of occupational duties. 若有兼職請全部列明，並詳述職位及職責。

2. Did the insured file any medical leave certificate to his/her employer? 有否向僱主遞交病假證明書?	<input type="checkbox"/> Yes 有 <input type="checkbox"/> No 沒有
3. Did the insured submit any claim for workmen's compensation for this accident? 有否就此意外申請勞工賠償?	<input type="checkbox"/> Yes 有 <input type="checkbox"/> No 沒有
Submission date 遞交日期: ( / / ) DD日 MM月YYYY年	
4. The insured's average monthly earned income during the period one year prior to the commencement of disability (Please provide income statement) - applicable to DI/PIP/PIPS claim only 開始傷殘前一年內的平均收入? (請遞交入息證明) - 只適用於入息保障賠償	

As part of our endeavour to keep our records updated and to maintain high quality of service, we sincerely invite you to provide us your email address. Please visit our website <https://eservice.chubbliife.com.hk> to update your email address.

為使能為閣下提供更完善的服務及本公司可不時更新客戶個人資料，本公司現誠邀閣下使用本公司網上服務 <https://eservice.chubbliife.com.hk>，以提供閣下的電郵地址。

**C. Other Insurance Coverage 其他保險資料**

Does the Insured have any other insurance policy covering this case? 受保人會否就是次索償獲得其他保險賠償? ☐ Yes 有 ☐ No 沒有

If "Yes", please complete below particulars. 若有, 請詳細填寫以下資料。

Name of insurer 投保公司	Policy no. 保單號碼	Benefit type 保障類別	Benefit amount 保障金額
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**D. Disability Particulars 傷殘詳情****1. Disability due to accident 因意外導致傷殘**

a. When (date and time) did the accident occur? 意外在何時 (日期及時間) 發生	(     /     /     ) DD日 MM月 YYYY年	(     :     ) HR時 MIN分	<input type="checkbox"/> AM 上午 <input type="checkbox"/> PM 下午
b. Where did the accident occur? 意外在何地發生			
c. How did the accident occur? (Please describe in details) 意外如何發生? (請描述詳情)			
d. Which part of the body injured and type of injury? 受傷部位及傷勢?			
e. Any hospital confinement incurred? 有否住院 If Yes, please provide the date of admission. 如有, 請提供入院日期	<input type="checkbox"/> Yes 有 <input type="checkbox"/> No 沒有	(     /     /     ) DD日 MM月 YYYY年	

**2. Disability due to illness 因病導致傷殘**

a. Describe the symptom & abnormalities which led to Disability 請描述導致受保人是次傷殘病徵及不適			
b. Details of first consultation for the illness 初診詳情	Date of first consultation 初診日期 (     /     /     ) DD日 MM月 YYYY年	Doctor's name 醫生姓名 _____ Address of the doctor 醫生地址 _____ Details 詳細情形 _____	
c. Since when the insured had the symptom first appeared? 受保人何時出現上述徵狀?	(     /     /     ) DD日 MM月 YYYY年		
d. Has the insured been treated by other doctor(s) for similar or related illness in the past? 受保人是否有因同一或有關病症而求診於其他醫生?	<input type="checkbox"/> Yes, please state 如有, 請詳述 <input type="checkbox"/> No 沒有	Date of first consultation 初診日期 (     /     /     ) DD日 MM月 YYYY年 Doctor's name 醫生姓名 _____ Address of the doctor 醫生地址 _____ Details 詳細情形 _____	

3. When did the insured become totally disabled so as to prevent from doing any work? 何時開始完全傷殘並導致完全喪失工作能力?	(     /     /     ) DD日 MM月 YYYY年
4. If still disabled, when does the insured expect to be able to return to full time work? 若仍然傷殘，估計何時可以回復全職工作?	(     /     /     ) DD日 MM月 YYYY年
5. If the insured has recovered, when was the insured able to perform part of the duties of his/her occupation or light work of any sort? (Please describe full job duties) 若現在已康復，受保人何時開始可以執行其日常工作的部份職責或任何其他非勞動性工作？（請詳述工作性質）	(     /     /     ) DD日 MM月 YYYY年 Details 詳細情形 _____

#### E. Treatment Particulars 治療詳情

Details of hospital confined or physicians consulted for this injury or illness 詳列出此次受傷或疾病而就診之醫生 / 醫院詳情

Name of physician(s) and/or hospital(s) 醫生 / 醫院名稱	Address(es) 地址	Date of consultation(s) and/or period of confinement 就診 / 住院日期
_____	_____	_____
_____	_____	_____
_____	_____	_____

#### F. Income Benefits Particulars 收入詳情 (Applicable To Income Protection Claim Only 只適用於傷殘入息保障賠償)

Income benefits 收入資料	Is the insured now receiving? Yes/No 受保人有否接受? 是 / 否	Does the insured expect to receive? Yes/No 受保人期望接受? 是 / 否	Date of benefits start(ed) 收入開始日期	Amount and frequency (weekly, monthly, etc.) please state currency 確實金額及頻率（每星期 / 每月） 請提供貨幣
a. Salary 工資 Income, wages, salary or other monetary remuneration from: 從以下所得之收入、工資、薪金、金錢回報				
i) The insured's present employer 僱主	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	_____	\$ _____ Per _____
ii) The insured's business (if self-employed) or partnership 自僱 / 合作伙伴	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	_____	\$ _____ Per _____
iii) Any other sources 其它來源	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	_____	\$ _____ Per _____
b. Insurance 保險 Disability benefits under any 從以下所得之傷殘入息保障利益				
i) Individual disability income policy 個人傷殘入息保障	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	_____	\$ _____ Per _____
ii) Group life insurance policy 團體人壽保障	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	_____	\$ _____ Per _____
iii) Group disability income policy 團體傷殘入息保障	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	_____	\$ _____ Per _____
iv) Retirement plan 退休金	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	_____	\$ _____ Per _____

c. Government benefits/disability benefits under 從以下所得之傷殘入息保障				
i) Social security 社會保障	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ii) Workers' compensation 勞工賠償	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
iii) Unemployment benefit scheme 失業救濟金	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
iv) Any other governmental agency scheme 其它政府機構計劃	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Others (please specify) 其它 _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

e. If the insured is eligible for any income benefits on account of his/her disability, but have not yet applied for them, when does the insured intend to apply for them? 如受保人仍未申請以上入息保障賠償，受保人會在何時申請？

(      /      /      ) DD日 MM月 YYYY年

#### G. Payment Currency 賠款貨幣

Please issue the following currency for the claim payment 請以以下貨幣支付賠償金

☐ HK dollar 港幣      ☐ Policy currency 保單貨幣

#### H. Payment Instruction 賠款方式

- ☐ Cheque 支票
- ☐ Bank Draft 本票 (drawn in Mainland China 於中國內地兌現)
- ☐ Telegraphic Transfer (TT) 電匯

Remarks 備註：

- For TT payment, please provide the SWIFT code, bank name, bank address and bank account number.  
若選擇電匯，請提供銀行代號、銀行名稱、銀行地址及戶口號碼。
- Bank charges may be incurred by client for clearing the bank draft and TT. Policyowner is recommended to check with the bank before applying this instruction.  
銀行或會向閣下徵收兌現本票或電匯的相關手續費。建議保單持有人於遞交指示前先向銀行查詢。
- If no option is selected or unclear information, the claim payment will be settled by cheque.  
如沒有選擇或資料不清，賠償金額將以支票發出。

#### I. Agent's/Intermediary's Statement 保險代理 / 中介人聲明

I/We have verified the original HKID card/passport/residential address proof of the policyowner and confirmed the identity details in the HKID card/passport to be matched with the identity of the policyowner in this claim form. I/We will provide the required information and copies of the relevant documents to Chubb Life Insurance Hong Kong Limited without delay. 本人 / 吾等已核對保單持有人的香港身份證 / 護照 / 居住地址證明之正本，並確認香港身份證 / 護照之身份資料與此賠償申請書上保單持有人之資料一致。本人 / 吾等將會儘快遞交有關文件之副本予安達人壽保險香港有限公司。

Agent's/intermediary's name 保險代理 / 中介人姓名

Agent's/intermediary's code 保險代理 / 中介人代號

Agency 組別

Agent's/intermediary's signature 保險代理 / 中介人簽署

Sign date 簽署日期

## J. Personal Information Collection Statement 個人資料收集聲明

Chubb Life Insurance Hong Kong Limited (“Chubb Life HK”, “Company”, “we”, “us”, “our”).

安達人壽保險香港有限公司(「安達人壽香港」、「本公司」、「我們」或「我們的」)。

Chubb Life HK recognizes the importance of protecting your privacy and is fully committed to implementing and complying with the Data Protection Principles and the Personal Data (Privacy) Ordinance of Hong Kong.

安達人壽香港明白保護閣下的私隱的重要性，並致力實施和遵守香港的《保障資料原則》和《個人資料（私隱）條例》。

### Personal Information we may collect

#### 我們可能收集的個人資料

In the course of us providing you with the insurance policy and related services (“Services”), we may from time to time collect your personal information for the purposes set out in this Personal Information Collection Statement (“PICS”). We may collect your personal information directly from you, or indirectly from other third parties in connection with the Services, including but not limited to when you complete or submit an application form, submit a claim, access our website, or participate in any of our and/or our partner’s programs. The personal information we collect may include but is not limited to your personal identification information, contact information, financial information, policy information, claims history, medical and health records.

在我們為閣下提供保單和相關服務（「服務」）的過程中，我們可能會不時收集閣下的個人資料，用於本個人資料收集聲明（「個人資料收集聲明」）中規定的目的。我們可能會直接從閣下收集閣下的個人資料，或從與服務相關的其他第三方間接收集閣下的個人信息，包括但不限於閣下填寫或提交申請表、提交索償、登入我們的網站或參與我們的及/或我們合作夥伴的任何計劃。我們收集的個人資料可能包括但不限於閣下的個人身份資料、聯絡資料、財務資料、保單資料、索償歷史、醫療和健康紀錄。

When you provide us with personal information about another person in connection with your application or insurance policy, which may include but is not limited to your dependents, the insured, the beneficiaries, your authorized representatives (“relevant persons”), you confirm you have obtained that relevant person’s consent to provide such personal information to us for the purposes stated in this PICS.

當閣下向我們提供與閣下的申請或保單有關的其他人的個人資料時，這可能包括但不限於閣下的受養人、受保人、受益人、閣下的獲授權代表（「有關人士」），閣下確認已獲得該人的同意，為本個人資料收集聲明中所述的目的向我們提供該等個人資料。

As a condition precedent to your application for the policy, you are required to provide us with the information set out under [Parts I and II of the application]. If you do not provide us with the required information, this may result in the us not being able to process your application, process claims or provide you with the Services.

作為閣下申請保單的先決條件，閣下需要向我們提供[申請表的第一部分和第二部分]中列出的資料。如果閣下不向我們提供所需資料，可能會導致我們無法處理閣下的申請、處理索償或向閣下提供服務。

### What we may use your Personal Information for

#### 我們可能將閣下的個人資料用於什麼目的

By making the application and receiving the Services, you give us your consent to use, process, disclose, transfer, store your or the relevant persons, personal information for any purpose related to the Services, and to communicate with you and the relevant persons for such purposes, which may include without limit:

通過提出申請和接受服務，閣下同意我們為與服務相關的任何目的使用、處理、披露、轉移、儲存閣下或有關人士的個人資料，並就該目的與閣下和有關人士溝通，可能包括但不限於：

- (i) to process and evaluate this and any future application for the insurance policy;  
處理和評估此申請以及任何未來的保單申請;
- (ii) for policy administration, processing payments and premium collection;  
用於保單管理、處理付款和保費收取;
- (iii) to conduct medical, security and underwriting checks;  
進行任何醫療、保安及核保檢查;
- (iv) to assess insurance claims and to process payments;  
評估保險索償及處理付款事宜;
- (v) to provide insurance products and related services;  
提供保險產品及有關服務;
- (vi) with your consent, to promote and directly market to you and your related persons: (a) the insurance products and services of the Chubb Limited group of companies; (b) mandatory provident fund-related products/services sponsored by the third party scheme providers connected with us; (c) insurance, financial or investment related products/services, rewards, loyalty, co-branding and/or other privileges programs related to health, wellness, medical, entertainment, media, offered by third party partners appointed by us;  
在閣下的同意下，向閣下及閣下的有關人士推廣及直接促銷; (a) 安達集團公司的保險相關產品/服務; (b) 與我們有關聯之第三者計劃供應商所提供的強制性公積金相關產品/服務; (c) 保險、金融或投資相關產品/服務、獎勵、忠誠度、聯合品牌及/或其他由我們指定的第三方合作夥伴提供與健康、醫療、娛樂、媒體相關的優惠計劃;
- (vii) to perform data matching and communicating with you and/or your relevant persons for such purposes;  
進行資料核對，及因此用途與閣下及閣下的有關人士聯絡;
- (viii) to cooperate with law enforcement bodies for law enforcement purposes, to prevent any serious threat to public safety; for police investigation purposes; or to comply with requirements imposed by or agreed with government or regulatory bodies or imposed by law or for litigation;  
協助執法團體執法，以防止任何嚴重威脅公眾安全的事宜；作警察進行調查用途；或遵守政府或監管機構施加或協議的規定；或訴訟；
- (ix) to enable industry associations, federations, government or regulatory bodies to carry out their functions and requirements that may be assigned to them from time to time as are reasonably required and in the interests of the insurance industry;  
讓保險行業協會及聯會、政府或監管機構執行其經不時修定及為合理要求以維護其及保險行業利益的功能及規定;

- (x) to conduct research, research, surveys, data analytics and statistics, administration, communications, computer, security and other services (including medical services, mailing and IT services) in connection with the usual operations of the Company as a life insurance company; and  
進行與本公司作為人壽保險公司的日常運營有關的研究、調查、數據分析和統計、行政、通訊、電腦、安全和其他服務（包括醫療服務、郵寄和資訊科技服務）；及
- (xi) for any other purpose directly relating to any of the above.  
用於與上述任何一項直接相關的任何其他目的。

#### **Who we may share your personal information with**

##### **我們可能與誰共享閣下的個人資料**

We may for the purposes stated in this PICS disclose or transfer your or the relevant persons, personal information, within or outside of Hong Kong, to:

我們可能會就本個人資料收集聲明中所述的目的，在香港境內或境外披露或轉移閣下或有關人士的個人資料至：

- (i) our authorized agents, insurance intermediaries, third party providers or administrators including healthcare providers, in connection with the placement or handling of your insurance policy and any related claims and/or services;  
就閣下的保單及任何相關索償及/或服務的安排或處理，獲我們授權的代理人、保險中介人、第三方供應商或管理人員，包括醫療保健供應商；
- (ii) reinsurers, claims investigators, loss adjudicators, fraud investigators, medical advisers, debt recovery agents, credit reference agencies, law enforcement bodies, fraud prevention agencies;  
再保險公司；理賠調查公司；理賠調查員；欺詐調查員、醫療顧問、債務追收公司、信貸資料機構、執法機構、防止欺詐機構；
- (iii) any branch, subsidiary, holding company, associated company or affiliates of Chubb Life HK (“Group Companies”);  
安達人壽香港（「集團公司」）的任何分行、附屬公司、控股公司、聯營公司或聯繫公司；
- (iv) our appointed third-party vendors, agents, contractors, advisers;  
我們指定的第三方供應商、代理人、承包商、顧問；及
- (v) insurance industry associations and federations, government or judicial or regulatory bodies, or any person to whom we have a legal or regulatory obligation to make disclosure.  
我們有法律或監管義務向其作出披露的保險行業協會和聯會，政府或司法或監管機構，或任何人士。

#### **Your data access rights**

##### **閣下查閱資料的權利**

You have the right to obtain access to and to request correction of your personal information held by Chubb Life HK or be given reasons for any refusal of access or correction. We may charge you a reasonable fee to process your data access request.

閣下有權查閱和要求更正安達人壽香港持有的閣下的任何個人資料，或獲得拒絕查閱或更正的理由。我們可能會向閣下收取合理的費用，以處理閣下的資料查閱要求。

For more details of the Company’s policies on personal data and privacy protection, please read the Chubb Life HK’s Privacy Policy available at <https://www.chubb.com/hk-en/footer/chubb-life-privacy-policy.html>. Any questions regarding personal data, access to or correction of personal data should be made in writing and submitted to: Data Protection Officer of Chubb Life Insurance Hong Kong Limited at 35/F, Chubb Tower, Windsor House, 311 Gloucester Road, Causeway Bay, Hong Kong.

有關本公司個人資料及私隱保障政策的詳情，請參閱安達人壽香港的私隱政策，網址為<https://www.chubb.com/hk-zh/footer/chubb-life-privacy-policy.html>。有關個人資料、查閱或更正個人資料的任何問題，請以書面形式向安達人壽保險香港有限公司的資料保護主任提出，並送交至香港銅鑼灣告士打道三十一號皇室大廈安達人壽大樓三十五樓。

In case of discrepancies between the English and Chinese version, the English version shall apply and prevail.

如中英文本有任何歧義之處，概以英文本為準。

## K. Authorization 授權

I hereby irrevocably authorize or authorize on behalf of the Insured (if different) (i) any employer, doctor, hospital, clinic, insurance company, government office or any organizations or persons who have any records, knowledge or information (whether medical or otherwise) of me or the Insured (if different) to disclose, release or transfer to Chubb Life Insurance Hong Kong Limited “the **Company**” or its representative such information pertinent to this claim; (ii) the Company or any of its appointed medical/para-medical examiners or laboratories to perform the necessary medical assessment and tests to evaluate my or the Insured (if different) health status in relation to this claim. This authorization shall bind my and the Insured’s successors and assignees and remain valid notwithstanding my or the Insured’s death or incapacity in so far as legally possible. A photocopy of this Authorization shall be valid as the original. 本人或受保人授權（如有不同）(i) 任何僱主、醫生、醫院、診所、保險公司、政府部門，或其他機構及人士，如具有本人／受保人（如有不同）的任何紀錄、知識或資料，可將該等資料向貴公司或貴公司代表透露、發放或移交，用以作為該份索償申請的參考；(ii) 貴公司或貴公司委任的醫療／輔助醫療檢查員或檢驗所，就有關索償的申請，進行醫療評估或測驗，以檢定本人／受保人（如有不同）的健康狀況。該授權書對本人／受保人的繼承人及承讓人均有約束力，即使在本人／受保人（如有不同）死亡或喪失行為能力後仍然有效。該授權書的影印本具有與正本同等的效力。

Agent's/intermediary's code 保險代理/中介人號碼	Signature of insured 受保人簽署	Signature of policyowner (if other than insured) 保單持有人簽署（如並非受保人）
Signature of witness/agent/intermediary 見證人 / 保險代理 / 中介人簽署	Date 日期	Date 日期
	Full name of insured 受保人姓名	Full name of policyowner* 保單持有人姓名*
Name of witness/agent/intermediary in full 見證人 / 保險代理 / 中介人姓名	HKID card/passport no. of insured 受保人香港身份證 / 護照號碼	HKID card/passport/BR no. of policyowner* 保單持有人香港身份證 / 護照 / 商業登記號碼*
	Date of birth of insured 受保人出生日期	Date of birth of policyowner* 保單持有人出生日期*
Date 日期	Nationality of insured 受保人國籍	Nationality of policyowner* 保單持有人國籍*

\* In compliance with the Anti-Money Laundering and Counter-Terrorist Financing (Financial Institutions) Ordinance and the Guideline on Anti-Money Laundering and Counter-Terrorist Financing which is issued by the Office of the Commissioner of Insurance as amended from time to time, Chubb Life Insurance Hong Kong Limited is required to collect the identity information for the above items with asterisk (\*) and verify the identity of the Policyowner. Your agent/intermediary, therefore, is needed to verify the original identification documents and collect the copies of the relevant and other documents as deemed necessary of the Policyowner.

\* 根據打擊洗錢及恐怖分子資金籌集（金融機構）條例及保險業監理處所發出及不時修訂之「打擊洗錢及恐怖分子資金籌集指引」，安達人壽保險香港有限公司必須收取以上註有星號(\*)項目之保單持有人身份資料並核實保單持有人之身份。閣下之保險代理／中介人必須核實保單持有人之正本身份證明文件，並收取有關及其他所須文件之副本。

Chubb. Insured.<sup>SM</sup>