

# CHANGE OF CONTACT DETAILS 更改客戶聯絡資料申請表



To: AMG WEALTH MANAGEMENT LIMITED ("AMG")

致：安柏環球財富管理有限公司（「安柏」）

## FOR INDIVIDUAL CLIENT ONLY 個人客戶專用

English Name 英文姓名 (as shown on ID/Passport) (與身份證/護照相同)
ID/Passport No. 身份證/護照號碼

## FOR CORPORATE CLIENT ONLY 公司客戶專用

Company Name 公司名稱
Business Registration Number 商業登記號碼

## UPDATE OF INFORMATION 更新資料

I would like to update the contact information as recorded in the followings where applicable: 本人要求更新以下的聯絡資料(如適用):

- ◆ The AMG client agreement that previously signed by me and 由本人曾簽署的安柏客戶協議書及

(Please select the Policies and/or Schemes to be changed and tick '✓' where appropriate) 【請選擇所需更改之保單及/或計劃，並在適當位置加上「✓」】

- ALL** Policies and/or Schemes that owned by me, with AMG as the current servicing financial intermediary.  
本人於安柏所持有的**所有**保單及/或計劃。
- BELOW** Policies and/or Schemes that owned by me, with AMG as the current servicing financial intermediary.  
本人於安柏所持有的**以下**保單及/或計劃。

Product Provider (Full Name) 保險公司名稱	Policy / Schemes No. 保單 / 計劃號碼 *

\* Applicable for Life Insurance, Investment-Linked Assurance Schemes ("ILAS"), General Insurance ("GI") Policy and Mandatory Provident Fund ("MPF") Scheme  
適用於人壽保險、投資相連壽險、一般保險保單及強制性公積金計劃

## Important Notes 重要事項：

By submitting this document, I fully understand, agree and consent that 於提交此文件時，本人完全明白及同意如下：

- all the terms and conditions as stated in the AMG client agreement that previously signed by me would remain the same.  
本人與安柏所簽訂的安柏客戶協議書內的條款及細則均會維持不變。
- my contact information that stated in this document will replace the contact information that I previously submitted to and recorded in AMG and below contact information will be used by AMG for all future correspondence.  
本人以此文件提供的聯絡資料會完全取代與安柏以往記錄，並且安柏將以下列提供的聯絡資料作為日後與本人通訊之用。
- I would submit, along with this document, the corresponding "Contact Information Update form(s)" provided by the respective financial product provider(s) ("Provider") to notify the Provider about the update of my contact information.  
本人於提交此文件時，亦一併提交保險公司的個人資料更新表格，以通知保險公司有關本人已更新的聯絡資料。
- for joint owners' case, AMG sends correspondence to the 1<sup>st</sup> policy owner only.  
如以聯名戶口開戶，安柏將會寄相關文件至第一保單持有人之通訊地址。
- AMG accepts no responsibility for the consequences of sending correspondence to these contact information provided by me.  
安柏無需承擔任何因本人所提供的聯絡資料所引致的後果。

Internal Use	Client ID:
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FOR INDIVIDUAL CLIENT ONLY 個人客戶專用

<b>1. Change of Contact Details 更改聯絡資料</b>
<b>The following New Address applies to 以下新地址將適用於^ :</b> <input type="checkbox"/> Residential Address** and Correspondence Address 住宅地址**及通訊地址 <input type="checkbox"/> Residential Address** 住宅地址** <input type="checkbox"/> Correspondence Address 通訊地址
_____ _____ _____
<b>^Remarks 備註 :</b> 1. Please put a "✓" in the appropriate box and complete in BLOCK LETTERS. 請在適當方格內加上「✓」號，並以正楷填寫。 2. Both Residential and Correspondence Address will be changed if not indicated. 如沒有指示，住宅地址及通訊地址將會被更改。
<b>New Telephone Number and Email Address 新電話號碼及電郵地址 :</b> Home Phone# 住宅電話號碼 _____ Mobile Phone# 手提電話號碼 _____ Office Phone# 公司電話號碼 _____ Email Address 電郵地址 _____
<b>** Please provide a proof of new address dated within the last 3 months 請提供距今不超過三個月之地址證明</b>

<b>2. Change of Personal Details (Please attach copies of supporting documents) 更改個人資料 (請附上有關證明文件副本)</b>
<b>New Name/ Nationality/ Identity No./ Signature and Other 新姓名/ 國籍/ 證件號碼/ 簽名及其他 :</b> Chinese Name 中文姓名 _____ English Name 英文姓名 _____ Nationality 國籍 _____ ID/Passport No. 身份證/護照號碼 _____ Signature 簽名 _____ Other (please specify) 其他 (請註明) _____

FOR CORPORATE CLIENT ONLY 公司客戶專用

<b>1. Change of Contact Details 更改聯絡資料</b>
<b>New Address(es) 新地址 :</b> Please note my new <b>Registered Address**</b> is 請注意本人的新 <b>註冊地址**</b> 為 : _____ _____ Please note my new <b>Business Address</b> is 請注意本人的新 <b>營業地址</b> 為 : _____ _____ Please note my new <b>Mailing Address</b> is 請注意本人的新 <b>通訊地址</b> 為 : _____ _____
<b>New Contact Person's Name/ Designation/ Contact Details and Other 新聯絡人的姓名/ 職銜/ 聯絡資料及其他 :</b> English Name 英文姓名: <u>Mr.先生/Ms.小姐</u> *** _____ Designation 職銜 _____ Contact Phone# 聯絡電話號碼 _____ Email Address 電郵地址 _____ Other (please specify) 其他 (請註明) _____
<b>** Please provide a proof of new address dated within the last 3 months 請提供距今不超過三個月之地址證明</b> <b>*** Please delete as appropriate 請刪去不適用者</b>

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

AMG Wealth Management Limited (“AMG”/“We”) is committed to the protection of privacy in relation to personal information. AMG collects, uses and retains your personal information in accordance with the Data Protection Principles and all relevant provisions of the Personal Data (Privacy) Ordinance (the “Ordinance”).

安柏環球財富管理有限公司（「安柏」/「我們」）致力保護閣下的私隱。安柏根據載於香港《個人資料(私隱)條例》（「條例」）的保障資料原則及各項有關規定收集、使用及保留閣下的個人資料。

### 1) Personal information we collect and/or hold 我們收集及/或持有的個人資料

Your personal information that we collect and/or hold, we believe to be relevant for us to understand your financial needs as well as to provide our service to you.

我們收集及/或持有我們認為相關而有助於瞭解閣下理財需要及為閣下提供服務的個人資料。

### 2) Importance of personal information collection 收集個人資料的重要性

The provision of your personal information is on a voluntary basis; however, if you do not provide sufficient information, we may not be able to provide service to you.

閣下提供個人資料皆是自願的。但倘若閣下未能提供足夠資料，我們可能無法為閣下提供服務。

### 3) Usage of personal information 個人資料的用途

Your personal information held by AMG may be used for the following purposes:-

安柏所持有的閣下個人資料可能會被用於下列用途：

- establishing and serving you as a client of AMG, the third party Financial Services and/or Financial Products suppliers of AMG and their respective affiliates and/or business partners;  
確立閣下為安柏、安柏第三者理財服務及/或理財產品供應商及彼等聯營及/或業務夥伴的客戶並向閣下提供服務；
- constructing and maintenance of contact lists;  
建立及維持聯絡人名單；
- determining whether any Financial Services and/or Financial Products of AMG, the third party Financial Services and/or Financial Products suppliers of AMG and their respective affiliates and/or business partners are suitable for you and to offer any such Financial Services and/or Financial Products to you,  
決定任何安柏、安柏第三者理財服務及/或理財產品供應商及彼等聯營及/或業務夥伴的理財服務及/或理財產品是否適合閣下，並以任何該等理財服務及/或理財產品向閣下提出要約；
- identity verification and records purposes;  
核對身份及儲存紀錄之用；
- complying with any law or regulation binding on or applicable to AMG; and  
遵守適用於安柏的法律或規例；及
- (with your consent - see section 7 below) direct marketing including but not limited to promoting, marketing or selling of Financial Services and/or Financial Products of AMG, the third party Financial Services and/or Financial Products suppliers of AMG and their respective affiliates and/or business partners by electronic or other means.  
(得到閣下的同意下 – 請看以下第七條)直接促銷，包括但不限於透過電子或其他模式作推廣、宣傳或銷售安柏、安柏第三者理財服務及/或理財產品供應商及彼等聯營及/或業務夥伴的理財服務及/或理財產品。

### 4) Information confidentiality 資料保密

Your personal information held by AMG will be kept confidential. But for the purpose of providing service to you, your personal information may be shared with:-

安柏所持有的閣下個人資料會被保密。但在為閣下提供服務的目的下，安柏可能會把閣下個人資料給予：

- any third party Financial Services and/or Financial Products suppliers of AMG and their respective affiliates and/or business partners;  
任何安柏第三者理財服務及/或理財產品供應商及彼等聯營及/或業務夥伴；
- any agent, contractor or third party services and/or products providers of AMG and their respective affiliate and/or business partner who provides administrative, telecommunications, computer, payment, anti-money laundering and/or other regulatory screenings and/or other services to AMG for any of the purposes set out above;  
任何向安柏提供行政、電訊、電腦、繳費、反清洗黑錢及/或其他法規的審查及/或其他服務的代理、承辦商或第三者服務及/或產品供應商及彼等聯營及/或業務夥伴，以作上述任何用途；
- branch, subsidiary, holding company, associated company and/or affiliates of AMG.  
安柏的分行、附屬公司、控股公司、有聯繫公司及/或關聯方。

- any person to whom AMG is under an obligation to make disclosure under the requirement of any law or regulation binding on or applicable to AMG or any of its group companies;  
根據法律或規例約束力的規定下，安柏或其集團公司有責任向其作出披露的任何人士；
- any other person under a duty of confidentiality to AMG which has undertaken to keep such information confidential; and  
其他對安柏資料有保密責任的人士；及
- any debt collection agencies.  
任何收賬代理。

**5) Transfer of information outside Hong Kong 轉移資料往香港以外地區**

AMG may from time to time transfer your personal information outside Hong Kong for different purposes including processing or storage.

安柏可能不時為不同的目的（包括處理或儲存）將閣下的資料轉移往香港以外地區。

**6) Data Access 資料查閱**

6.1 Under and in accordance with the terms of the Ordinance, you have the right to (i) check whether AMG holds data about you and seek access to such data; and (ii) require AMG to correct any data relating to you which is inaccurate.

根據條例中的條款，閣下有權(i)查詢安柏是否持有閣下的資料及查閱有關的資料；及(ii)要求安柏改正有關閣下不準確的資料。

6.2 AMG may charge a reasonable fee for the processing of any data access request.

安柏有權就處理任何查閱資料的要求收取合理費用。

6.3 Requests under section 6.1 should be addressed to the following:

AMG Data Protection Officer

Unit 01, 40/F, 118 Connaught Road West, Hong Kong

任何關於上述條款 6.1 的要求，應向下列人士提出：

安柏資料保護主任

香港干諾道西一一八號四十樓零一室

**7) Direct Marketing 直接促銷**

With your consent, AMG may use any of the personal information it holds about you for direct marketing purposes in relation to Financial Services and/or Financial Products.

If you do not consent to AMG using your personal information for the above purposes, please tick the relevant “opt-out” box on this Client Agreement, and we will not do so. You may also subsequently withdraw your consent by writing to our AMG Data Protection Officer. If you exercise your right to opt-out of the use of your personal information for the above purposes, it will mean that AMG will not be able to send you any market commentary, direct marketing, targeted or special offers in the future.

得到閣下的同意下，安柏可使用閣下提供予安柏的任何個人資料作直接促銷理財服務及/或理財產品之用。

如閣下不同意安柏就以上用途使用閣下的個人資料，請在本客戶協議內有關的選擇拒絕方格中畫上☒號，我們便不會使用閣下的個人資料作以上用途。閣下亦可隨時通知我們的安柏資料保護主任撤回閣下的同意意願。若閣下行使你的權利拒絕閣下的個人資料被用作以上用途，這代表將來閣下不能從安柏處收到任何市場評論與及針對性或特別優惠的直接促銷。

This Personal Information Collection Statement shall be deemed an integral part of all contracts, agreements and other binding arrangements which you have entered into or intend to enter into with AMG.

此個人資料收集聲明將成為閣下與安柏或將與安柏訂定之所有合約、協議、及其他約束性安排之一部份。

**Client Acknowledgements 客戶確認**

I agree that AMG may use and/or disclose my personal information in accordance with AMG’s Personal Information Collection Statement and I acknowledge that I have read and understood the enclosed copy of the said Statement. I understand that I have the right to opt-out of the use of my personal information in accordance with the option set out below.

本人同意安柏可根據其個人資料收集聲明，使用及/或披露本人之個人資料。本人確認已閱讀及明白附隨的此聲明。本人明白本人有權根據以下選擇拒絕本人個人資料被用於下列用途。

Client 客戶：(Please tick the appropriate box below) 【請於下列適當之方格內加上‘✓’號】

**I understand that opting out will mean that AMG will not be able to send me any market commentary, direct marketing, targeted or special offers in the future.**

本人明白選擇拒絕本人個人資料被用於下列用途會導致將來本人不能從安柏處收到任何市場評論與及針對性或特別優惠的直接促銷。

I agree AMG to use my personal data for direct marketing purposes.

本人同意安柏使用本人個人資料作直接促銷之用。

I do not agree AMG to use my personal data for direct marketing purposes.

本人不同意安柏使用本人個人資料作直接促銷之用。

I hereby sign to confirm I have filled in and completed this form accurately and have read and agreed with the IMPORTANT NOTES on the cover page of this document.

本人確認表格上所有資料是完整及正確並已閱讀及同意本文件上的重要事項。

**For Individual Client Only 個人客戶專用 (Please sign below 請在以下簽署)：**

Client signature 客戶簽署

\_\_\_\_\_

Name of client 客戶姓名

\_\_\_\_\_

Date 日期

\_\_\_\_\_ dd日/ mm月/ yyyy年

**For Corporate Client Only 公司客戶專用 (Please sign below 請在以下簽署)：**

Signature of 1<sup>st</sup> or only Authorized Signatory and company chop

第一或唯一獲授權簽署人簽署及公司蓋章

\_\_\_\_\_

Name of 1<sup>st</sup> or only Authorized Signatory

第一或唯一獲授權簽署人姓名

\_\_\_\_\_

Date 日期

\_\_\_\_\_ dd日/ mm月/ yyyy年

Signature of 2<sup>nd</sup> Authorized Signatory (if applicable) and company chop

第二獲授權簽署人簽署(如適用)及公司蓋章

\_\_\_\_\_

Name of 2<sup>nd</sup> Authorized Signatory (if applicable)

第二獲授權簽署人姓名(如適用)

\_\_\_\_\_

Date 日期

\_\_\_\_\_ dd日/ mm月/ yyyy年

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