

Client Referral Form 客戶推薦表格

AXA Wealth Management (HK) Limited
 Swiss Privilege Client Referral Programme*
 安盛財富管理(香港)有限公司
 瑞士尊貴理財客戶推薦計劃2011*

Please return the completed Client Referral Form and return to your servicing consultant.
 請將填妥之客戶推薦表格直接交予 閣下之理財顧問。

I would like to refer the following person(s). I acknowledge that the information provided below is entirely voluntary:
 本人謹推薦以下親友並確認以下資料均為其本人自願提供：

Referee	English Full Name 英文全名	<input type="text"/>	Contact Number 聯絡電話	<input type="text"/>
	E-Mail Address 電郵地址	<input type="text"/>		

I confirm that I have obtained the consent of the above person(s) who agreed to my provision of the above contact details to Swiss Privilege of AXA Wealth Management (HK) Limited for this Client Referral Programme.

本人謹確認已獲上述人士同意本人向安盛財富管理(香港)有限公司之瑞士尊貴理財提供上述資料，以作客戶推薦計劃之用。

* Subject to the Terms and Conditions of the Client Referral Programme.
 受客戶推薦計劃之條款及細則約束。

Information provided by the Referrer in this form is entirely voluntary and will be treated in strict confidence. In addition, the information will only be used for the purpose of carrying out this Client Referral Programme. The above person(s) will be notified of the source of the information when necessary.

推薦人於此表格中提供的資料將會絕對保密，並只會用於是次客戶推薦計劃。如有需要，上述人士將可查詢其個人資料的來源。

Referrer's Signature 推薦人簽署		Date 日期	
Referrer's Name 推薦人姓名	<input type="text"/>	Contact Number 聯絡電話	<input type="text"/>
Mailing Address 郵遞地址	<input type="text"/>		
E-Mail Address 電郵地址	<input type="text"/>		
Policy Number 保單編號	<input type="text"/>	Servicing Consultant 理財顧問	<input type="text"/>

The personal data you provide here will be used by AXA Wealth Management (HK) Limited ("the company") for the purpose of gift redemption in Client Referral Program. The company may disclose or transfer your personal data to supplier(s) (whether within or outside the Hong Kong Special Administrative Region) in order to achieve this purpose. You have the right to obtain access to and request correction of any of your personal data held by the company. Any such request should be made in writing to customercare.sp@swissprivilege.com.

您在此提供的個人資料會被安盛財富管理(香港)有限公司(下稱「本公司」)用作。本公司有可能將這些資料轉交經本公司指定的供應商，及/或其集團公司或關聯公司(不論是否在香港特別行政區成立)，以宣傳其產品或服務。您有權要求查閱及更改本公司所持有關於您的個人資料。如您希望提出有關要求，您可以書面形式電郵至本公司，電郵地址 customercare.sp@swissprivilege.com。

For Internal Use Only 內部使用	Lead Source: PID No. 資料來源

Letter of Consent for Referee 被推薦人同意書

AXA Wealth Management (HK) Limited
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Thank you for choosing AXA Wealth Management (HK) Limited as your lifetime wealth management partner.

As a token of appreciation, your relative/ friend _____ (the name of the "Referrer") who refers YOU as our privileged client will be entitled to receive 100 Swiss Points¹ as a referral reward under our Client Referral Programme. The Swiss Points can be used to redeem items listed in the Referral Reward Catalogue 2011².

感謝 尊貴閣下選擇瑞士尊貴理財作為您的終身理財夥伴。

為答謝您的親友(「推薦人」)推薦您成為我們的客戶，您的親友_____將會獲享此客戶推薦計劃之100分獎賞積分¹。獎賞積分可用以換領推薦計劃獎賞目錄內的各項禮品²。

Eligibility and Successful Referral 成功推薦的資格：

Premium of the First Policy⁴ must not be less than: 首份保單的最低保費額 ⁴ 必須不少於：	Reward³ 獎賞 ³
US\$3,000 for annualised regular premium 每年定期保費 ⁵ 3,000 美元 Or 或 US\$30,000 for single premium 整付保費 30,000 美元	100 Swiss Points 100 分獎賞積分

I confirm my agreement to join this Programme and understand that if this referral is successful, the Referrer will be notified about my successful application of the relevant policy and will be offered the applicable reward. However, Referee's information and investment details will not be disclosed.

本人確認同意參與此客戶推薦計劃，並明白若此推薦成功，推薦人將接獲本人之保單成功批核的通知及相關獎賞，惟保單內容將絕對保密，不會公開。

Signature 簽署：_____

Full name 姓名：_____ Date 日期：_____

Note: ¹ Subject to the Terms and Conditions of the Client Referral Programme

² The reward will only be given upon fulfillment of all conditions imposed under this Programme, including your consent to the arrangement under this Programme. For more details of this Programme, please refer to the Referral Reward Catalogue or the Company website www.swissprivilege.com.

³ Swiss Points are accumulated on case basis of Successful Referral.

⁴ Premium amount is calculated in US dollars or equivalent amount of HK dollars. The existing exchange rate is US\$1.00 to HK\$7.80, AXA Wealth Management (HK) Limited reserves the right to change such rate without prior notice.

⁵ Total amount of regular premiums paid in the first year of the policy.

註：¹ 受客戶推薦計劃之條款及細則所限。

² 需符合此推薦計劃內之所有條件，包括您向我們同意此推薦計劃內之安排，推薦人方可獲取推薦獎賞。有關此推薦計劃之詳情，請參閱有關推薦計劃獎賞目錄或瀏覽公司網站：www.swissprivilege.com。

³ 獎賞積分按照每次成功推薦而累積。

⁴ 保費金額以美元或等值的港元計算。現時的兌換率為\$1.00美元兌\$7.80港元，惟安盛財富管理(香港)有限公司保留更改該兌換率之權利，而毋須事前通知。

⁵ 保單首年度繳付之定期保費總和。