



富通財策服務系統 (B.O.S.S.)
業務夥伴用戶指南



建議使用 Google Chrome (一般電腦) 或 Safari (iPad) 瀏覽器登入B.O.S.S.系統



www.ftlfe.com.hk English 简体

B.O.S.S 財策服務系統

歡迎登入 B.O.S.S. 財策服務系統



登入

用戶名稱：

密碼：

登入 重設

輸入用戶名稱及用戶密碼，然後點擊「登入」

ABOUT SSL CERTIFICATES

* 請留意用戶於首次登入時必須更改密碼及首次登入密碼之有效期為30天。有關密碼政策的詳情，請參閱附件一。

建議使用 Google Chrome (一般電腦) 或 Safari (iPad) 瀏覽器登入B.O.S.S.系統



聲明

財策服務系統 (Business Oriented Support System) 使用條款

富通保險有限公司(富通保險)保留一切未在本使用條款中明確授予的權利。

財策服務系統("本網站")是一個以互聯網為基礎的私人入門網站，只開放給經授權的富通保險營業員、保險代理商(包括其經正式授權的負責人和業務代表(如有))、銷售渠道(包括但不限於保險顧問和獨立理財顧問)及職員。

財策服務系統中可包含電子郵件服務、電子公告板服務、檔案下載服務、資訊查詢服務、電子表格、理財分析、保險建議書及/或其他訊息或通訊工具，該等服務及工具是為了讓經授權的用戶可與他人通訊及進行業務支援服務而設的(統稱為"財策服務系統服務")。

1. 《使用條款》的修訂

富通保險財策服務系統服務是根據本使用條款中的各項條款、條件和通知("《使用條款》")所提供的，富通保險保留對《使用條款》進行修訂的權利。閣下有責任定期查閱與財策服務系統相關的特定網站上張貼的《使用條款》及任何附加條款。若閣下繼續使用或瀏覽本網站，即構成閣下同意所有《使用條款》及其他附加條款。

2. 概述

若閣下點擊"接受"按鍵，或瀏覽/進入本網站及其中的任何頁面，或使用財策服務系統服務，即構成閣下同意遵守本《使用條款》。

閣下承諾在任何時候完全及有效地彌償富通保險並使其獲得彌償就以下情況直接或間接地遭受、引致或支付的所有損失、損害、訴訟、法律程序、費用、申索、索求、責任及開支等(包括法律及其他費用和代支款項)：

- (i) 閣下進入本網站及其中的任何頁面及/或使用財策服務系統服務(超出了《使用條款》的允許範圍，或未經富通保險授權)；
- (ii) 閣下完全或部分使用本網站及/或其中的任何頁面及/或財策服務系統服務而製作的任何資訊、數據或資料；或

(iii) 閣下任何違反或違反《使用條款》中的任何規定。

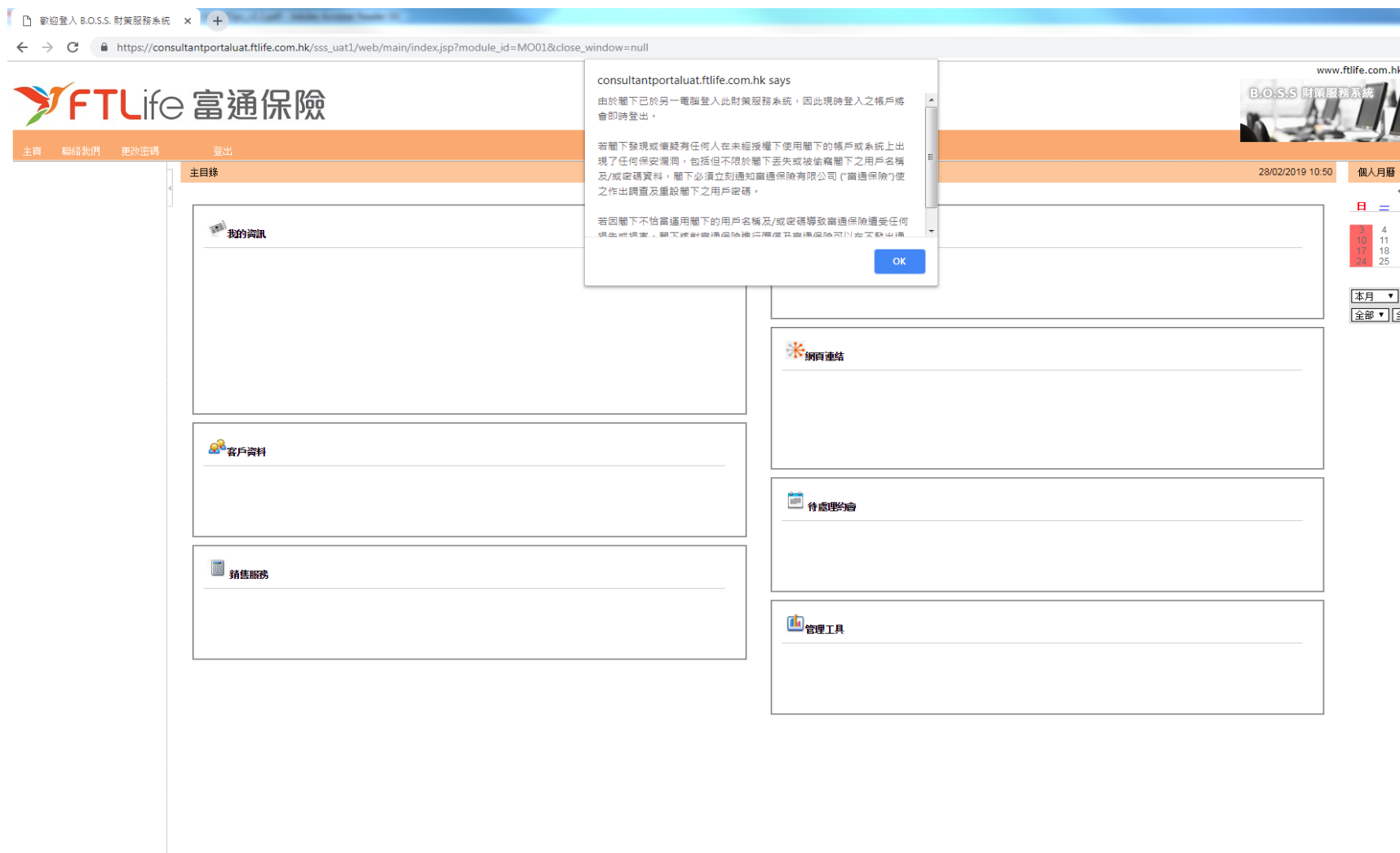
接受

不接受

請於瀏覽聲明內容後按「接受」登入主頁(詳情請參閱附件二 - 聲明)

溫馨提示:

- 用戶於點擊"接受"鍵前，必須清楚閱讀聲明內容。請注意，有關之聲明內容可隨時變更而不作另行通知。
- 為釋有關安全及資料私隱的憂慮，請緊記於用後立即登出版面。



The screenshot shows a web browser window with the URL https://consultantportaluat.ftlife.com.hk/sss_uat1/web/main/index.jsp?module_id=MO01&close_window=null. The page header includes the FTLlife logo and navigation links: 主頁, 聯絡我們, 更改密碼, 登出. A central modal window displays a security warning in Chinese:

consultantportaluat.ftlife.com.hk says
由於閣下已於另一電腦登入此財策服務系統，因此現時登入之帳戶將會即時登出。

若閣下發現或懷疑有任何人在未經授權下使用閣下的帳戶或系統上出現了任何保安漏洞，包括但不限於閣下丟失或被偷竊閣下之用戶名稱及/或密碼資料，閣下必須立刻通知富通保險有限公司（「富通保險」）使之作出調查及重設閣下之用戶密碼。

若因閣下不恰當運用閣下的用戶名稱及/或密碼導致富通保險遭受任何損失或損害，閣下將對富通保險承擔其當備保險可以支付款項。

OK

The background page shows a sidebar with '我的資訊', '客戶資料', and '銷售服務'. The main content area has sections for '網頁連結', '待處理約會', and '管理工具'. A calendar widget on the right shows the date 28/02/2019 10:50 and a '個人月曆'.

溫馨提示: 若用戶懷疑閣下之用戶名稱於同時間在沒有授權下被其他人士在另一電腦登入而出現以上之系統提示，請聯絡作進一步策略夥伴服務跟進及報告該可疑事故。

經銷商管理

- ✓ 轉換投資選擇
- ✓ 更改未來投資選擇分配
- ✓ 網上投資服務交易記錄

授權代表用戶 - 轉換投資選擇



歡迎 XXXXXXX
FINANCIAL SERVICES
LIMITED

特色工具

業務查詢

獨立單位附屬投資選擇

獨立單位附屬更改未來投資
選擇分配

大量獨立單位附屬投資
選擇

大量獨立單位附屬更改未來
投資選擇分配

獨立單位附屬網上投資前線
交易記錄

獨立單位附屬投資選擇

22/03/2018 17:22

搜尋

1

基本計劃編號：

COLM - 「縱橫」

2

轉出的相關基金：

F154

轉字方式：

保單編號

選擇

3

搜尋 更改

搜尋結果

保單編號

保單持有人姓名

保單持有人中文姓名

基本計劃編號

記錄數目：0

1 / 1

1. 選擇基本計劃
2. 選擇轉出相關基金
3. 按「搜尋」鍵以列出擁有相關基金的有關保單進行轉出過程

授權代表用戶 - 轉換投資選擇

獨立理財顧問轉換投資選擇

28/02/2019 15:26

搜尋

基本計劃編號*: COLM - 「縱橫」
轉出的附屬基金*: F162
排序方式: 保單編號 | 遞增

搜尋 重設

搜尋結果

記錄數目 - 61

保單編號	保單持有人姓名	保單持有人中文姓名	基本計劃編號
<input checked="" type="checkbox"/> 000201760169	Takata xxxxxxx	高田xx	COLM
<input type="checkbox"/> 000201831511	Leung xxx xxxx Raymond	梁偉x	COLM
<input type="checkbox"/> 000202041085	Ho xxxx Hing	何國x	COLM
<input type="checkbox"/> 000202052290	Lam xxxx Ching	林沅x	COLM
<input type="checkbox"/> 000202106660	Tanaka xxxxxxx		COLM
<input type="checkbox"/> 000202203735	Wong xxxx Kwan	黃洪x	COLM
<input type="checkbox"/> 000202207668	Chan xxxx Man	陳敬x	COLM
<input type="checkbox"/> 000203017870	Zeng xxxxxx	曾海x	COLM
<input type="checkbox"/> 000203020065	Namba xxxxxxxxx		COLM
<input type="checkbox"/> 000203054385	Irie xxxx		COLM

全選取消 選擇 遞交

1 / 7

1. 請選擇有關保單以進行轉換投資選擇
2. 然後按「遞交」

授權代表用戶 - 轉換投資選擇



主頁 聯絡我們 更改密碼 登出

歡迎 XXXXXX FINANCIAL SERVICES LIMITED

網區工具 業務查詢

獨立理財顧問轉投資選擇

獨立理財顧問轉投資選擇分配

大量獨立理財顧問轉投資選擇

大量獨立理財顧問更改未來投資選擇分配

獨立理財顧問網上投資服務交易記錄

獨立理財顧問轉投資選擇

獨立理財顧問轉投資選擇

投資摘要

保單編號: 000201760169

基本計劃編號: 「縱橫」(COLM)

閣下確認指示前, 請閱讀下文之重要說明

重要說明

- 只有在以下所有文件仍生效時, 閣下才獲允許進入:
 - 一份富通保險有限公司(「富通保險」)和閣下公司
 - 一份閣下公司和有關保險的保單持有人(「保單」)代保單持有人向富通保險發出投資指示而不
 - 及
 - 一份閣下公司和保單持有人共同簽妥及給當(「必要條件一」)
- 閣下必須已得閣下公司妥為授權可代表(甲)已選用
- 當必要條件一及必要條件二不存在時, 嚴禁使用此網站的使用是受限於閣下公司和保單持有人共同
- 在符合已達到必要條件一及必要條件二之情形下,
- 閣下代保單持有人提交的申請並不會即時於網上處
- 閣下代保單持有人的申請中提供用於轉入相關基金
- 轉入相關基金分配百分比須為100%。若分
- 每項交易的轉入投資選擇申請只適用於該交易, 未
- 於同日處理申請的數目時間為每個香港工作日的下
- 如未能符合上述規定, 閣下的申請將會被延遲處理
- 倘於同一工作天內透過此網站收到相同交易超過
- 倘於同一工作天內收到閣下就(1)相同交易透過此網
- 倘若先前的投資選擇轉換申請仍在處理當中, 閣下
- 請注意, 閣下代保單持有人所提出的申請須受我們

投資涉及風險。過往業績對像並非未來業績的指標。

聲明

本人, 作為可代表(甲)已選用我選擇權進行投資管理權損失或損害承擔責任及不備本人通過此網站及或本人及為我代我承諾給富通、富通集團所有其他成員、各自的董事、職員、代理和僱員並向其承擔因我們通過此網站及或獨立理財顧問平台所作出的任何作為、不作為或行為, 而使之可能蒙受或致招的一切直接或間接出現的或相結合的損失、損害、責任、索賠、訟費和費用。

本人確認已閱讀、明白及同意以上「重要說明」。

注意: 若上述條款的英文版本與中文譯本有任何差異, 概以英文版本為準。

繼續

投資選擇轉換常問問題

- 問: 如要申請投資選擇轉換, 單位價格及交易時間/日子會怎樣計算?
答: 一般情況下, 轉出(Switch out)的單位價格日期均為T+1及轉入(Switch in)的單位價格日期均為T+4, 故等投資選擇轉換申請會在T+5日完成, 並可於T+6日透過此網站查閱。
註: 「T」是指轉換申請的提交日, 而每日截數時間為每個工作日的下午3:00pm正(不包括星期六及公眾假期), 並客戶透過此網站申請完成時計算。
- 問: 什麼情況下, 投資選擇轉換完成時間會多於T+5?
答:
 - 基金公司有當地假期, 而沒有當日價格
 - 基金公司不能處理提供價格
 - 轉出或轉入投資選擇時中意外出現E1基金
 - 基金公司有投資選擇修改更改
 - 同時有同一投資選擇轉換交易正在進行中
 - 同時有正進行收取每月費用
 - 申請文件資料不完整
- 問: 填寫申請表以新方式遞交與貴公司或客戶透過網上申請投資選擇轉換的服務承諾是否相同?
答: 不是, 如填寫申請表以新方式遞交與本公司或客戶透過網上申請投資選擇轉換, 轉出(Switch out)及轉入(Switch in)的單位價格日期均為T+1, 故等投資選擇轉換申請會在T+2日完成, 並可於T+3日透過此網站查閱。
註1: 「T」是指轉換申請的提交日, 而每日截數時間為每個工作日的下午3:00pm正(不包括星期六及公眾假期), 並以公司收到申請表或客戶透過網上申請完成時計算。
註2: 如首次轉換投資選擇的金額達到港幣500,000或以上(以專項投資選擇計算), 新轉出及轉入的投資選擇並不保證能以相同信託日的價格作即時買賣, 但公司將以最近及可使用之信託日的價格進行轉入投資選擇。
- 問: 我可否於同一工作天內透過此網站申請多於一次的投資選擇轉換?
答: 不可以, 倘於同一工作天內透過此網站收到就相同交易超過一項的申請, 我們收到的最新申請將會取代之前的申請。

繼續 >

相關基金名稱	單位數量			單位價格 【按匯率計算】 (位值日)	最初價
	最初供款 帳戶	累積供款 帳戶	額外投資 帳戶		
鄧普頓環球債券基金 (A類別累積 股份)	30.9337	0.0000	0.0000	USD29.84000 (22/11/2018)	USD
資本標準 - 新興市場債券基金 (A 類累積(美元))	29.1834	0.0000	0.0000	USD41.89520 (22/11/2018)	USD1
貝萊德全球基金 - 環球高收益債券 基金 (A2股份)	40.3208	0.0000	0.0000	USD24.01000 (22/11/2018)	USD
富達基金 - 亞洲高收益基金 (A類 別累積股份 - 美元)	66.3026	0.0000	0.0000	USD16.57000 (22/11/2018)	USD1
行匯宏揚中國基金 - 美元單位	345.9478	0.0000	0.0000	USD1.24400 (22/11/2018)	USD
天達GSF環球策略股票基金 (A累 積股份)	41.9718	0.0000	0.0000	USD26.70000 (22/11/2018)	USD1
富達基金 - 美國基金 (A類別股份)	3.1863	0.0000	0.0000	USD10.75000 (22/11/2018)	US
富達基金 - 歐元藍籌基金 (A類別股 份)	1.0585	0.0000	0.0000	EUR20.63000 (22/11/2018)	EUR
富達基金 - 太平洋基金 (A類別股份)	22.7728	0.0000	0.0000	USD32.73000 (22/11/2018)	USD1
基金價值總額					HKD 51,227.48 100.00%

資料

閣下以上申請, 貴公司須對延遲處理而招致的任何直接、間接、特別或相

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- 1) 於遞交轉換投資選擇後, 系統便發出「重要說明」訊息予用戶
- 2) 用戶可點擊有關保單之連結查看保單內容
- 3) 當用戶細閱「重要說明」* 後, 請按「繼續>」前往下一步

* 詳情請參閱附件三 - 「重要說明」

主頁 聯絡我們 更改密碼 登出

歡迎 XXXXXX
FINANCIAL SERVICES
LIMITED

銷售工具
業務查詢
獨立理財顧問轉換投資選擇
獨立理財顧問更改未來投資選擇分配
大量獨立理財顧問轉換投資選擇
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獨立理財顧問網上投資服務
交易紀錄

獨立理財顧問轉換投資選擇

獨立理財顧問轉換投資選擇

保單編號: 000201760169
基本計劃編號: 「縱橫」(COLM)

投資選擇轉換常問問題

閣下確認指示前，請閱讀

重要說明

1. 只有在以下所有次
(i) 一份富通保
(ii) 一份閣下公
而不需要讓
及
(iii) 一份閣下公
("必要條件一")
2. 閣下必須已得閣下
3. 當必要條件一及/或
4. 此網站的使用是受
5. 在符合已達到必要
6. 閣下代保單持有人
7. 閣下在此網站代保
8. 閣下代保單持有人
9. 轉入相關基金分配
10. 每項交易的轉入投
11. 於同日或遲申報的
12. 如未能符合上述規
13. 倘於同一工作天內
14. 倘於同一工作天內
15. 倘若先前的投資選
16. 請注意，閣下代保

投資涉及風險。過往業

聲明

本人，作為可代表(甲)
此網站及/或獨立理財顧
本人為及代我司承諾
本人確認已閱讀、明白
注意：若上述條款與

1) 問: 如我申請投資選擇轉換，單位價格及交易時間/日子會怎樣計算?

答: 一般情況下，轉出(Switch out)的單位價格日期均為T+1及轉入(Switch in)的單位價格日期均為T+4，故每宗投資選擇轉換申請會在T+5日完成，並可於T+6日透過此網站查詢。

註: "T"是指轉換申請的遞交日，而每日截數時間為每個工作天的下午3:00p.m.正(不包括星期六及公眾假期)，並客戶透過此網站申請完成時間計算。

2) 問: 什麼情況下，投資選擇轉換完成時間會多於T+5?

答:

- 基金公司當地假期，而沒有當日價格
- 基金公司不能即時提供價格
- 轉出或轉入投資選擇其中包括法巴(LI)基金
- 基金公司投資程序作出更改
- 同時間有同一投資選擇轉換交易正在進行中
- 同時間正進行收取每月費用
- 申請文件資料不完整

3) 問: 填寫申請表以郵寄方式遞交至貴公司或客戶透過網上申請投資選擇轉換的服務承辦是否相同?

答: 不是。如填寫申請表以郵寄方式遞交至本公司或客戶透過網上申請投資選擇轉換，轉出(Switch out)及轉入(Switch in)的單位價格日期均為T+1，故每宗投資選擇轉換申請會在T+2日完成，並可於T+3日透過此網站查詢。

註1: "T"是指轉換申請的遞交日，而每日截數時間為每個工作天的下午3:00p.m.正(不包括星期六及公眾假期)，並以公司收到申請表或客戶透過網上申請完成時間計算。

註2: 如每次轉換投資選擇的金額達到港幣500,000或以上(以每項投資選擇計算)，所轉出及轉入的投資選擇並不保證能以相同估值日的價格作同步買賣，但公司將以最接近及可使用之估值日的價格進行轉入投資選擇。

4) 問: 我可否於同一工作天內透過此網站申請多於一次的投資選擇轉換?

答: 不可以。倘於同一工作天內透過此網站收到數相同交易超過一項的申請，我們收到的最新申請將會取代之前的申請。

註: 有關投資選擇轉換詳情，閣下亦可瀏覽投資選擇轉換首頁內的「重要提示」

[繼續 >](#)

- 「常問問題」*會於點擊「繼續>」後出現以供用戶參考。

* 請參閱附件五-「常問問題」

授權代表用戶 - 轉換投資選擇

獨立理財顧問轉換投資選擇

獨立理財顧問轉換投資選擇 > 選擇買出之基金

基金編號: 000001760169
基本計劃編號: 「縱橫」(COLM)

每次轉換之最低金額為保單持戶價值的1%。

選擇轉出之投資選擇:

請選擇買出之選項:

- 我願意將上列保單的以下相關基金所有資產賣出，並轉換到新投資組合。
- 我願意將上列保單的以下相關基金所有資產賣出。

選擇轉出所有相關基金之百分比

選擇轉出部份相關基金之百分比

基金公司	相關基金名稱	投資選擇編號	單位數量	轉換出
安本國際基金管理有限公司	安本標準 - 新興市場債券基金 (A類累積(美元))	F162	29,1834	100

註: 倘有關申請轉出的投資選擇基金單位數量少於實際持有數量，我們將按您所選擇轉出的投資選擇內所有基金數量全數賣出。

閣下經指示前，請閱讀下文之重要說明：

重要說明

- 只有在以下所有文件仍生效時，閣下才獲允許進入此網站：
 - (i) 一份富通保險有限公司(富通保險)和閣下公司簽訂有關投資顧問服務的有效協議；
 - (ii) 一份閣下公司和有關保單的保單持有人(保單持有人)簽訂有關運用閣下公司授權進行投資管理的有效協議，而其中保單持有人已授權閣下公司(甲)作出一切投資決定，可更改保單持有人保單所持有的基金，以及行使選擇權將保單持有人保單內所持有的基金轉換，而不必諮詢保單持有人意見；(乙)可代保單持有人向富通保險而不需要獲得保單持有人的同意；
 - 及
 - (iii) 一份閣下公司和保單持有人共同簽妥及給富通保險的有效投資顧問服務授權書，而其中保單持有人已授權富通保險可依據閣下公司所提供的投資指示行事，而不必諮詢保單持有人簽署有關指示。(“必要條件一”)
- 閣下必須已得閣下公司妥為授權可代表(甲)已運用閣下公司授權進行投資管理服務的保單持有人；及(乙)閣下公司向富通保險發出投資指示。(“必要條件二”)
- 當必要條件一及/或必要條件二不存時，嚴禁使用此網站，閣下應立即登出此網站及獨立理財顧問平台，富通保險單因未經授權使用此網站及/或獨立理財顧問平台引起之損失的權利及若富通保險為責時，富通保險事件向香港警方匯報。
- 此網站的使用是受閣下閣下公司和保單持有人共同簽妥給富通保險的投資顧問服務授權書和富通保險閣下公司簽訂有關投資顧問服務協議之條款和條件。
- 在符合已達到必要條件一及必要條件二的情況下，閣下可透過此網站代保單持有人提交申請轉出保單持有人保單的保單戶口內的所有相關基金單位。閣下可選擇(i)按百分比(必須為整數)；或(ii)按單位數目(每項相關基金單位最多為4個小數位)轉出指定相關基金。
- 閣下代保單持有人提交的申請並不會即時於網上處理，有關申請將會於本公司批准當日才正式生效。於收到閣下代保單持有人提交的申請及完成有關授權程序後，我們將會寄予保單持有人確認文件及一份確認文件的副本予閣下以作記錄。
- 閣下在此網站代保單持有人提交的申請將符合本公司按本公司發出予保單持有人的有關保單之條款不時釐定的最低轉換及持有金額要求。倘若轉出的申請會導致保單持有人保單戶口內任何一項相關基金的餘下的金額少於最低的持有金額，閣下代保單持有人只可提交申請(i)轉出之金額不能令保單持有人保單戶口內該項相關基金所有單位；或(ii)轉出保單持有人保單戶口內該項相關基金所有單位。
- 閣下代保單持有人的申請中提供用於轉入相關基金的限額金額百分比必須符合我們不時訂定的最低分配要求。
- 轉入相關基金分配百分比必須為100%，若分配百分比未達到100%，閣下代保單持有人自行把分配百分比調整至100%，才可透過此網站提交有關申請。
- 香港交易所的轉入投資選擇申請只適用於收市後，未來供款的投資選擇分配百分比則不受影響。倘若閣下希望代保單持有人更改保單持有人未來供款的投資選擇分配，請先完成網站內獨立理財顧問更改未來投資選擇分配”的部份。
- 於每日處理申請的截數時間為每個香港工作日的下午3時，於截數時間後提交的申請將被視為下一個香港工作日提交，並由我們相應處理。
- 如未能符合上述規程，閣下的申請將會被延遲處理，任何不清晰的申請將不會被處理或完成，閣下應以書面作出更正，我們方能繼續處理閣下的申請。
- 倘若同一工作天內透過此網站收到相同交易超過一項的申請，我們收到的最新申請將會取代之前的申請。
- 倘若同一工作天內收到閣下閣下(甲)相同交易透過此網站及其他方法發出超過一項申請；或(甲)不同交易發出超過一項申請，富通保險可保留酌情決定權處理該等申請之先後次序，在該情況下，該等申請將有較長時間處理，富通保險毋須對因此引起的任何直接、間接、特別或相應損失或損害承擔責任。
- 倘若先前的投資選擇申請轉出在處理當中，閣下就買出相同相關基金代保單持有人作出的新申請將不被處理，直至先前的申請已經完成。
- 請注意，閣下代保單持有人所提出的申請將受我們向保單持有人發出的保單內的每月扣保險款所限制。

投資涉及風險。過往業績數據並非未來業績的指標。投資者須注意，投資回報會受正常的市場及外匯風險所影響。在作出任何投資決定前，請參閱「產品指南」、「投資指南」，以及個別相關投資基金的銷售文件之詳情及有關收費資料。

聲明

本人，作為可代表(甲)已得閣下公司授權進行投資管理服務的保單持有人；及(乙)致向富通保險發出投資指示的親身授權人，茲要求及授權富通保險為保單持有人保單執行上述投資指示。本人明白富通保險只會在合理時間內處理以上申請，貴公司毋須對延遲處理而招致的任何直接、間接、特別或相應損失或損害承擔責任此網站及/或獨立理財顧問平台所作出的行為，不作為政府所追討對保單持有人保單之保單價值之任何損失或責任負責。

本人為及代我受委託人(包括其成員、合各的董事、職員、代理人及信託)向富通保險我們透過此網站及/或獨立理財顧問平台所作出的任何作為、不作為或行為，而使之可能蒙受或招致的任何直接或間接出現的或相關的損失、損害、責任、索賠、訟費和費用。

本人確認已閱讀、明白及同意以上「重要說明」。

注意：看上述條款之英文版本與中文版本如有任何差異，概以英文版本為準。

繼續 > 更改 取消

- 於“常見問題”點擊“下一步”後，用戶可選擇基金之100%或現持有基金所指定之百分比。

授權代表用戶 - 轉換投資選擇



富通 FINANCIAL SERVICES LIMITED

28/03/2016 16:48

個人理財服務轉投資選擇

個人理財服務轉投資選擇 > 選擇買入之基金 > 選擇買入之基金

基金編號: 000201760169
基金計劃編號: 「純債」(CCUM)

選擇轉入之投資組合

基金公司	選擇基金名稱	投資選擇編號	基金分配
安本國際基金管理有限公司	安本環球 - 新興市場債券基金 (4億美元,美元)	F162	100%

選擇轉入之投資組合

基金公司	選擇基金名稱	投資選擇編號	基金分配
1. 安本國際基金管理有限公司			
2. 安本環球投資亞太有限公司			
3. 東方匯理資產管理			
4. 東方匯理資產管理(香港)有限公司			
5. 法國巴黎資產管理(亞洲)有限公司			
6. 富達資產管理			
7. 富達(香港)有限公司			
8. 富達環球資產管理有限公司			
9. 富達基金(香港)有限公司			
10. 富蘭克林投資(亞洲)有限公司			
海通證券(香港)有限公司			
里昂證券(香港)有限公司			
里昂證券(香港)有限公司			
里昂證券(香港)有限公司			
天達資產管理有限公司			
摩根資產管理			
新加坡富達投資(香港)有限公司			
木里資產管理有限公司			

繼續 > 更改 取消 < 返回首頁

1. 選擇用戶所定的基金公司
2. 選擇基金
3. 輸入百分比，請注意，轉入基金百分比總和應為100%
4. 點擊「繼續>」前往下一步

授權代表用戶 - 轉換投資選擇



主頁 聯絡我們 更改密碼 登出

- 歡迎 XXXXXX FINANCIAL SERVICES LIMITED
- 銷售工具
- 查詢查詢
- 獨立理財顧問轉投資選擇
- 獨立理財顧問更改未來投資選擇分配
- 大量獨立理財顧問轉投資選擇
- 大量獨立理財顧問更改未來投資選擇分配
- 獨立理財顧問網上投資服務交易紀錄

獨立理財顧問轉投資選擇 > 選擇買出之基金 > 選擇買入之基金 > 確認資料

基金編號: 000201760169
基本計劃編號: 「縱橫」(COLM)

投資選擇詳情:			
選擇轉出的相關基金:			
基金公司	相關基金名稱	投資選擇編號	轉出
安本國際基金管理有限公司	安本標準 - 新興市場債券基金 (A類累積美元)	F162	100%
選擇轉入的相關基金:			
基金公司	相關基金名稱	投資選擇編號	轉入
安本國際基金管理有限公司	安本標準 - 印度股票基金 (A類累積美元)	F154	100%

閣下確認指示前, 請閱讀下文之重要說明:

重要說明

- 只有在以下所有文件仍生效時, 閣下才獲允許進入此網址:-
 - (i) 一份富通保險有限公司(「富通保險」)和閣下公司簽訂有關投資顧問服務的有效協議;
 - (ii) 一份閣下公司和有關保險的保單持有人(「保單持有人」)簽訂有關運用閣下公司賬戶進行投資管理的有關協議, 而其中保單持有人已授權閣下公司(甲)作出一切投資決定, 可更改保單持有人保單所持的基金, 以及行使選擇權將保單持有人保單內所持的基金轉換, 而不必諮詢保單持有人意見; (乙)可代保單持有人向富通保險發出投資指示而不需要獲得保單持有人的同意;
 - 及
 - (iii) 一份閣下公司和保單持有人共同簽妥及給富通保險的有效投資顧問服務授權書, 而其中保單持有人已授權富通保險可依據閣下公司所提供的投資指示行事, 而不必諮詢保單持有人簽署有關指示。(「必要條件一」)
- 閣下必須已得閣下公司妥為授權可代表(甲)已運用閣下公司賬戶進行投資管理服務的保單持有人; 及(乙)閣下公司向富通保險發出投資指示。(「必要條件二」)
- 當必要條件一及或必要條件二不存在時, 嚴禁使用此網址, 閣下應立即退出此網址及獨立理財顧問平台。富通保留單因未經授權使用此網址及或獨立理財顧問平台引起之損失的權利及富通認為高要時, 富通會把事件向香港警方匯報。
- 此網址的使用是受限於閣下公司和保單持有人共同簽妥給富通保險的投資顧問服務授權書和富通與閣下公司簽訂有關投資顧問服務協議之條款和條件。
- 在符合已達到必要條件一及必要條件二的情況下, 閣下可透過此網址代保單持有人提交申請轉出保單持有人保單的保單戶口內的任何相關基金單位, 閣下可選擇0(標百分之)或(必須為整數); 或0(標單位數目(每項相關基金單位最多為4個小數位))轉出指定相關基金。
- 閣下代保單持有人提交的申請並不會即時於網上處理, 有關申請將會於本公司收據當日才正式生效, 於收到閣下代保單持有人提交的申請及完成有關授權手續後, 我們將會電子保單持有人確認文件及一份確認文件的副本閣下以作記錄。
- 閣下在此網址代保單持有人提交的申請須符合本公司按本公司發出不保單持有人的有關保單之條款不時變動的最低轉出及持有金額要求, 倘若轉出的申請會導致保單持有人保單戶口內任何一項相關基金的餘下金額少於最低的持有金額, 或0(轉出保單持有人保單戶口內該項相關基金所有單位)。
- 閣下代保單持有人的申請中提供用於轉入相關基金的賬戶金額分配百分比:
- 轉入相關基金分配百分比必須為100%, 應分配百分比必須和未達到11
- 每項基金的轉入投資選擇申請只適用於該基金, 未供供的投資選擇分11
- 於每日處理申請的截數時間為每個香港工作日的下午3時, 於截數時間後12
- 如未能符合上述規定, 閣下的申請將會被延遲處理, 任何不清楚的申請13
- 倘若前一工作天內透過此網址收到數額超過一項的申請, 我們放14
- 倘若前一工作天內收到閣下數0(相關基金)透過此網址及其他方法發出數15
- 倘若先前的投資選擇申請仍在處理當中, 閣下就買出相同相關基金16
- 請注意, 閣下代保單持有人所提出的申請須受我們向保單持有人發出的

consultantportaluat.ftlfe.com.hk says
此項指示將於下一個香港工作日處理

因此相取的任何真確、問、特別或相應換或損害承擔責任。

OK
貴資料。

投資涉及風險。過往業績並不代表未來業績的指標。投資者須注意, 投資!

聲明

本人, 作為可代表(甲)已運用我授權進行投資管理服務的保單持有人; 及(乙)我對富通保險發出投資指示的授權人擔任, 茲要求及授權富通保險為保單持有人保單戶口執行上述投資指示, 本人明白富通保險只會在合理時間內處理以上申請, 貴公司毋須對延遲處理而引致的任何真確、問、特別或相應換或損害承擔責任及不會因本人透過此網址及或獨立理財顧問平台所作出的作為, 不作為或行為造成對保單持有人保單之保單價值之任何損失或責任負責。

本人為及代我可承擔賠償富通、富通集團所有其他成員、各自的董事、職員、代理和僱員並向其承擔因我們透過此網址及或獨立理財顧問平台所作出的任何真確、不作為或行為, 而使之可能蒙受或取得的一切真確或問或出現的或相應的損失、損害、責任、索賠、罰款和費用。

本人確認已閱讀、明白及同意以上「重要說明」。

注意: 若上述條款之英文版本與中文版本有任何差異, 概以英文版本為準。

確認 取消 < 返回前頁

1. 點擊“確認”前往下一步
2. 若轉換投資選擇指示於截止時間後遞交, 將有訊息顯示以提醒用戶該指示將於下一個香港工作日處理。

授權代表用戶 - 轉換投資選擇



主頁 聯絡我們 更改密碼 登出

- 歡迎 XXXXXX
FINANCIAL SERVICES
LIMITED
- 銷售工具
- 業務查詢
- 獨立理財顧問轉換投資選擇
- 獨立理財顧問更改未來投資選擇分配
- 大量獨立理財顧問轉換投資選擇
- 大量獨立理財顧問更改未來投資選擇分配
- 獨立理財顧問上投資服務及登記

獨立理財顧問轉換投資選擇

獨立理財顧問轉換投資選擇 > 選擇賣出之基金 > 選擇買入之基金 > 確認資料 > 完成

核對車隊號: IFA-CONVOY-D001
申請編號: 7915
日期及時間: 28-Feb-2019 16:28

1

保單摘要:

保單編號: 000203591933
基本計劃編號: 「縱橫」(COLM)

申請詳情: 獨立理財顧問轉換投資選擇

選擇轉出的相關基金:

基金公司	相關基金名稱	投資選擇編號	轉出
安本國際基金管理有限公司	安本標準 - 印度股票基金 (A類原價(美元))	F154	100%

選擇轉入的相關基金:

基金公司	相關基金名稱	投資選擇編號	轉入
安本國際基金管理有限公司	安本標準 - 拉丁美洲股票基金 (A類原價(美元))	F155	100%

3

列印版本 儲存版本 同時更改未來投資選擇分配

2

4

1. 交易記錄: 供用戶了解申請次序及狀況
2. 用戶可以「列印版本」作記錄
3. 用戶可以「儲存版本」作記錄
4. 若客戶欲應用相同之轉換投資選擇予未來投資選擇分配上, 只需點擊No. 4鍵前往

授權代表用戶 - 更改未來投資選擇分配

consultantportaluat.ftlfe.com.hk says

新投資選擇分配百分比只適用於在此項申請生效後才繳交的保費。

OK Cancel

2



獨立理財顧問更改未來投資選擇分配

獨立理財顧問更改未來投資選擇分配 > 未來基金供款選擇 > 確認資料

保單編號

保單編號: 000203591933
基本計劃編號: 「橫濱」(COLM)

選擇未來投資選擇

基金公司	相關基金名稱	投資選擇編號	基金分配
安本國際基金管理有限公司	安本標準 - 拉丁美洲股票基金 (A類累積美元)	F155	100%

閣下確認指示前，請閱讀下文之重要說明：

重要說明

- 只有在以下所有文件仍生效時，閣下才獲允許進入此網址：
 - 一份富通保險有限公司(富通保險)和閣下公司簽訂有關投資顧問服務的有效協議；
 - 一份閣下公司和有關保單的保單持有人(保單持有人)簽訂有關閣下公司獲授權進行投資管理的有效協議，而其中保單持有人已授權閣下專責獲得保單持有人的同意；
 - 及
 - 一份閣下公司和保單持有人共同簽發及給富通保險的有效投資顧問服務授權書，而其中保單持有人已授權富通保險可依據閣下公司所提供的《必要條件一》
- 閣下必須已得閣下公司最高授權可代表(甲)已選用閣下公司獲授權進行投資管理服務的保單持有人；及(乙)閣下公司向富通保險發出投資指示。(《必要條件一》及《必要條件二》不存在時，閣下應使用此網址，閣下應立即登出此網址及獨立理財顧問平台，富通保險單號未經授權使用此網址及/或此網址的使用受限於閣下公司和保單持有人共同簽發給富通保險的投資顧問服務授權書和富通與閣下公司簽訂有關投資顧問服務協議內之條款和條件。若符合必要條件一及必要條件二的情況下，閣下可透過此網址代保單持有人提交申請更改保單持有人保單的未來供款投資選擇分配百分比。
- 閣下代保單持有人提交的申請中提供每項相關基金之最低分配百分比須符合我們不時規定的最低分配要求，該百分比必須為整數。
- 未來供款投資選擇分配百分比必須為100%，若分配百分比未達到100%，閣下須代保單持有人自行把分配百分比調整至100%，才可透過此網址。
- 閣下須留意閣下透過此網址代保單持有人申請更改的投資選擇分配百分比，只適用於在此項申請辦理後才繳交的保費，倘若閣下希望代保單持有人(閣下代保單持有人)提交的申請並不會即時於網上處理，有關申請將會於本公司批覆當日才正式生效，至於閣下代保單持有人提交的申請及完成者)。
- 於每日處理申請的截數時間為每個香港工作日的下午3時，於截數時間後提交的申請將被視為於下一個香港工作日提交，並由我們相應處理。
- 如未能符合上述規定，閣下的申請將會被延遲處理，任何不清晰的申請將不會被處理或完成，閣下須以書面作出更正，我們方能繼續處理閣下的申請。
- 倘於同一工作天內透過此網址收到超過一項申請，我們收到的最新申請將會取代之前的申請。
- 倘於同一工作天內收到閣下透過此網址及其他方法發出超過一項申請，富通保險可全權酌情決定處理該等申請之先後次序，在該情況下，該等申請需要較長時間處理，富通保險毋須對此短欠之任何異議、問賬、特別或相應損失或損害承擔責任。

consultantportaluat.ftlfe.com.hk says
此項指示將於下一個香港工作日處理

3

OK

投資涉及風險。過往業績數據並非未來業績的指標。投資者須注意，投資回報會受正常的市場及外匯風險所影響。在作出任何投資決定前，請參閱「產品指南」、「投資指南」，以及個別相關投資基金的銷售文件之詳情及有關收費資料。

聲明

本人，作為可代表(甲)已選用或可授權進行投資管理服務的保單持有人；及(乙)致函向富通保險發出投資指示的認可授權人，茲要求及授權富通保險為保單持有人保單戶執行上述投資指示，本人明白富通保險只會在合理時間內處理以上申請，貴公司毋須對延遲處理而短欠的任何異議、問賬、特別或相應損失或損害承擔責任及不會因本人透過此網址及/或獨立理財顧問平台所作出的作為、不作为或行為所造成對保單持有人保單之保單價值之任何損失或責任負責。本人為及代表我可承擔和償還、富通與保單所有其他成員、各自的董事、職員、代理人及僱員並向與承擔因我們透過此網址及/或獨立理財顧問平台所作出的任何作為、不作为或行為，而使之可能蒙受或短欠的一切直接或間接出現的或相應的損失、損害、責任、索賠、紛爭和費用。本人確認已閱讀、明白及同意以上「重要說明」。
注意：若上述傳單的英文版本與中文譯本載有任何差異，概以英文版本為準。

1

確認 取消 < 返回首頁

- 於點擊更改未來投資選擇分配後及確認交易，將有訊息顯示以提醒用戶該更改投資選擇分配只適用於未來供款上。
- 若有關申請於截止時間後遞交，於點擊“OK”後，系統將有訊息顯示以提醒用戶該指示將於下一個香港工作日處理。

授權代表用戶 - 更改未來投資選擇分配



主頁 聯絡我們 更改密碼 登出

- 歡迎 XXXXXX
FINANCIAL SERVICES
LIMITED
- 銷售工具
- 業務查詢
- 獨立理財顧問轉投資選擇
- 獨立理財顧問更改未來投資
選擇分配
- 大量獨立理財顧問轉投資
選擇
- 大量獨立理財顧問更改未來
投資選擇分配
- 獨立理財顧問網上投資服務
交易紀錄

獨立理財顧問更改未來投資選擇分配

28/02/2019 17:07

獨立理財顧問更改未來投資選擇分配 > 未來基金供款選擇 > 確認資料 > 完成

提交申請者: IFA-CONVOY-D001
申請編號: 7917
日期及時間: 28-Feb-2019 17:07

保單摘要:

保單編號: 000203591933
基金計劃編號: 「環球」(COLM)

申請詳情: 獨立理財顧問更改未來投資選擇分配

更改未來投資選擇分配:

基金公司	相關基金名稱	投資選擇編號	分配
安本國際基金管理有限公司	安本標準 - 澳洲股票基金 (A股累積(澳元))	F160	100%

列印版本 儲存版本

用戶可以「列印版本」或「儲存版本」為記錄。

經銷商管理

- ✓ 轉換投資選擇
- ✓ 更改未來投資選擇分配
- ✓ 網上投資服務交易記錄

- 歡迎 XXXXXX
FINANCIAL SERVICES
LIMITED
- 銷售工具
- 業務查詢
- 獨立理財顧問轉換投資選擇
- 獨立理財顧問更改未來投資選擇分配
- 大豐獨立理財顧問轉換投資選擇
- 大豐獨立理財顧問更改未來投資選擇分配
- 獨立理財顧問網上投資服務交易紀錄

獨立理財顧問更改未來投資選擇分配

搜尋

基本計劃編號：
現有的相關基金*：
排序方式：

1

COLM - 「縱橫」

F154

保單編號 遞交

2

搜尋結果

保單編號	保單持有人姓名	保單持有人中文姓名	基本計劃編號
<input type="checkbox"/> 000203581833	Ma xxxxxx	馬碧x	COLM
<input type="checkbox"/> 全場取消選擇			

3

4

1. 選擇基本計劃(現時此功能只適用於「縱橫」產品)
2. 選擇相關基金-以列出擁有相同基金之保單
3. 選擇有關之保單作更改未來投資選擇分配
4. 按「遞交」鍵前進

授權代表用戶 - 更改未來投資選擇分配

- 歡迎 XXXXXX FINANCIAL SERVICES LIMITED
- 銷售工具
- 業務查詢
- 獨立理財顧問投資選擇
- 獨立理財顧問更改未來投資選擇分配
- 大量獨立理財顧問投資選擇
- 大量獨立理財顧問更改未來投資選擇分配
- 獨立理財顧問網上投資服務交易紀錄

獨立理財顧問更改未來投資選擇分配

獨立理財顧問更改未來投資選擇分配

保單概要

保單編號:

000203591932

基本計劃編號:

「縱橫」(COLM)

閣下確認指示前，請閱讀下文之重要說明。

重要說明

- 只有在以下所有條件仍生效時，閣下才獲允許進入此網站：
 - (i) 一份富通保險有限公司(「富通保險」)和閣下公司簽訂有關投資顧問服務
 - (ii) 一份閣下公司和有關保單的保單持有人(「保單持有人」)簽訂有關選用閣下專責獲得保單持有人的同意；及
 - (iii) 一份閣下公司和保單持有人共同簽妥及給富通保險的有效投資顧問服務(「必要條件一」)
- 閣下必須已得閣下公司妥為授權可代表(甲)已選用閣下公司專責獲得進行投資管理
- 當必要條件一及/或必要條件二不再存在時，閣下使用此網站，閣下應立即發出
- 此網站的使用是受限於閣下公司和保單持有人共同簽妥給富通保險的投資顧問
- 在符合已達到必要條件一及必要條件二之情形下，閣下可透過此網站代表保單持
- 閣下代表保單持有人提交的申請中提供選擇相關基金之最低分配百分比須符合第
- 未來供款投資選擇分配百分比出處和必須為100%，若分配百分比出處和未達到10
- 閣下須留意閣下透過此網站代表保單持有人申請更改的投資選擇分配百分比，只
- 閣下代表保單持有人提交的申請並不會即時於網上處理，有關申請將會於本公
- 於同日處理申請的款項時間為香港工作日的下午3時，於款項時間屆滿後
- 如未能符合上述規定，閣下的申請將會被延遲處理，任何不清楚的申請將不會
- 倘於同一工作天內透過此網站收到超過一項申請，我們收到的最新申請將會
- 倘於同一工作天內收到閣下透過此網站及其他方法發出超過一項申請，富通保

投資涉及風險，過往業績數據並非未來業績的指標，投資者須注意，投資回報會

聲明

本人，作為可代表(甲)已選用我專責獲得進行投資管理服務的保單持有人；及(乙)我可向富通保險發出投資指示的授權人，茲要求及授權富通保險為保單持有人保單賬戶執行上述投資指示，本人明白富通保險只會按閣下所填妥之申請，貴公司採辦附屬選擇而招致的任何匯率、開支、特別或相應損失或損害承擔

地址及或獨立理財顧問平台所作出的作為，不作為或行為所造成對保單持有人保單之保單價值之任何損失或責任負責。

本人為及代表我可承擔有關富通、富通集團所有其他成員、各自的董事、職員、代理和僱員並向其承擔因閣下透過此網站及/或獨立理財顧問平台所作出的任何作為，不作為或行為，而使之可能蒙受或招致的一切匯率或開支出現的或相關的損失、損害、責任、索賠、訟費和費用。

本人確認已閱讀、明白及同意以上「重要說明」。

注意：若上述條款之英文版本與中文版本有任何差異，概以英文版本為準。

相關基金名稱 (投資選擇 - 編號)	基本保費分配	定期額外投資分配
新豐亞洲債券基金 - 新豐大東亞基金 (A類別) (F148)	10%	不適用
東方策略系列基金 - CPR 策略生活基金 (A2U-累積股份) (F188)	10%	不適用
行健策略中國基金 - 美元單位 (F217)	10%	不適用
摩根中國光耀A級基金 (F225)	10%	不適用
天達GSF環球策略基金 (A累積股份) (F78)	20%	不適用
安本標準 - 亞洲小型公司基金 (A累積股份) (F83)	10%	不適用
富通基金-南來西亞基金(A類別股份) (FIMALF)	10%	不適用
富通基金-太平洋基金(A類別股份) (FIPACA)	10%	不適用
新豐環球基金(A類別累積股份) (TEMTHA)	10%	不適用

繼續 >

- 於遞交更改未來投資選擇分配後，重要說明即顯示予用戶參閱
- 用戶可點擊有關保單之連結查看保單內容
- 請按 “繼續>”前往下一步

授權代表用戶 - 更改未來投資選擇分配



主頁 聯絡我們 更改密碼 登出

歡迎 XXXXXX
FINANCIAL SERVICES
LIMITED

銷售工具

業務查詢

獨立理財顧問投資選擇

獨立理財顧問更改未來投資選擇分配

大量獨立理財顧問投資選擇

大量獨立理財顧問更改未來投資選擇分配

獨立理財顧問網上投資服務交易紀錄

獨立理財顧問更改未來投資選擇分配

獨立理財顧問更改未來投資選擇分配 > 未來基金供款選擇

01/03/2019 09:27

訊息摘要:

保單編號: 000203591933
基金計劃編號: 「環球」(COLM)

更改未來投資選擇供款

基金公司	相關基金名稱	投資選擇編號	基金分配
1. 安本國際基金管理有限公司	F154 安本標準 - 印度股票基金 (A類累積 (美元))	F154	100%
2.			%
3.			%
4.			%
5.			%
6.			%
7.			%
8.			%
9.			%
10.			%

繼續 > 重設 取消

1. 選擇更改未來投資選擇及分配百分比
2. 請按“繼續>”前往下一步

授權代表用戶 - 更改未來投資選擇分配

consultantportaluat.ftlife.com.hk says

新投資選擇分配百分比只適用於在此項申請生效後才繳交的保費。

OK Cancel

2



28/02/2019 16:50

獨立理財顧問更改未來投資選擇分配

獨立理財顧問更改未來投資選擇分配 > 未來基金供款選擇 > 確認資料

保單編號

保單編號: 000203591933
基本計劃編號: 「縱橫」(COLM)

選擇未來投資選擇

基金公司	相關基金名稱	投資選擇編號	基金分配
安本國際基金管理有限公司	安本標準 - 拉丁美洲股票基金 (A類累積美元)	F155	100%

閣下確認指示前，請閱讀下文之重要說明：

重要說明

1. 只有在以下所有文件仍生效時，閣下才獲允許進入此網站：-

- (i) 一份富通保險有限公司(富通保險)和閣下公司簽訂有關投資顧問服務的有效協議；
 - (ii) 一份閣下公司和有關保單的保單持有人(保單持有人)簽訂有關閣下公司獲授權進行投資管理的有效協議，而其中保單持有人已授權閣下公司(甲)作出一切投資決定，可更改保單持有人保單所持的基金，以及行使選擇權將保單持有人保單內所持的基金轉換，而不必諮詢保單持有人意見；(乙)可代保單持有人向富通保險發出投資指示而不需要獲得保單持有人的同意；及
 - (iii) 一份閣下公司和保單持有人共同簽發及給富通保險的有效投資顧問服務授權書，而其中保單持有人已授權富通保險可依據閣下公司所提供的投資指示行事，而不必諮詢保單持有人簽署有關指示。
- (必要條件一)
2. 閣下必須已得閣下公司妥為授權可代(甲)已選用閣下公司獲授權進行投資管理服務的保單持有人；及(乙)閣下公司向富通保險發出投資指示。(必要條件二)
3. 當必要條件一及/或必要條件二不存在時，閣下應使用此網站，閣下應立即登出此網站及獨立理財顧問平台，富通保險單方面未經授權使用此網站及/或獨立理財顧問平台引起之損失及若富通認清其責任，富通會把事件向香港警方匯報。
4. 此網站的使用受限於閣下公司和保單持有人共同簽發給富通保險的投資顧問服務授權書和富通與閣下公司簽訂有關投資顧問服務協議內之條款和條件。
5. 在符合已達到必要條件一及必要條件二的情況下，閣下可透過此網站代保單持有人提交申請更改保單持有人保單的未來供款投資選擇分配百分比。
6. 閣下代保單持有人提交的申請中提供每項相關基金之最低分配百分比須符合我們不時訂起的最低分配要求，該百分比必須為整數。
7. 未來供款投資選擇分配百分比總和必須為100%，應分配百分比總和未達到100%，閣下應代保單持有人自行把分配百分比調整至100%，才可透過此網站提交有關申請。
8. 閣下須留意閣下透過此網站代保單持有人申請更改的投資選擇分配百分比，只適用於在此項申請處理後才繳交的保費，倘若閣下希望代保單持有人更改現時所持有的投資分配，請完成本網站內「獨立理財顧問轉投資選擇」的部份。
9. 閣下代保單持有人提交的申請並不會即時線上處理，有關申請將會於本公司批核當日才正式生效，至於閣下代保單持有人提交的申請及完成有關批核程序後，我們將會寄予保單持有人確認文件及一份確認文件的副本予閣下以作紀錄。
10. 於每日處理申請的截數時間為每週香港工作日的下午3時，於截數時間後提交的申請將被視為於下一個香港工作日提交，並由我們相應處理。
11. 如未能符合上述規程，閣下的申請將會被延遲處理，任何不清晰的申請將不會被處理或完成，閣下應以書面作出更正，我們方能繼續處理閣下的申請。
12. 尚於同一工作天內透過此網站收到超過一項申請，我們收到的最新申請將會取代之前的申請。
13. 尚於同一工作天內收到閣下透過此網站及其他方法發出超過一項申請，富通保險可全權酌情決定處理該等申請之先後次序，在該情況下，該等申請需要較長時間處理，富通保險毋須對此拒絕之任何異議、問賬、特別或相應損失或損害承擔責任。

投資涉及風險，過往業績數據並非未來業績的指標，投資者須留意，投資回報會受正常的市場及外匯風險所影響，在作出任何投資決定前，請參閱「產品指南」、「投資指南」，以及個別相關投資基金的銷售文件之詳情及有關收費資料。

聲明

本人，作為可代表(甲)已選用或可授權進行投資管理服務的保單持有人；及(乙)致可富通保險發出投資指示的認可授權人任，茲要求及授權富通保險為保單持有人保單賬戶執行上述投資指示，本人明白富通保險只會在合理時間內處理以上申請，貴公司毋須對延遲處理而招致的任何異議、問賬、特別或相應損失或損害承擔責任及不會因本人透過此網站及/或獨立理財顧問平台所作出的作為，不作為或行為所造成對保單持有人保單之保單價值之任何損失或責任負責，本人為及代我可承擔和償富通、富通集團所有其他成員、各自的董事、職員、代理人及僱員並向與承擔因我們透過此網站及/或獨立理財顧問平台所作出的任何作為，不作為或行為，而使之可能蒙受或招致的一切直接或間接出現的或相關的損失、損害、責任、索賠、紛爭和費用，本人確認已閱讀、明白及同意以上「重要說明」。

注意：若上述傳真的英文版本與中文譯本有任何差異，概以英文版本為準。

1

確認 取消 < 返回首頁

1. 請按“確認”前往
2. 訊息將顯示以提醒用戶該指示在被接納及有關分配生效後才適用於其後繳付的保費。

授權代表用戶 - 更改未來投資選擇分配



主頁 聯絡我們 更改密碼 登出

歡迎 XXXXXX
FINANCIAL SERVICES
LIMITED

銷售工具
業務查詢
獨立理財顧問轉投資選擇
獨立理財顧問更改未來投資選擇分配
大量獨立理財顧問轉投資選擇
大量獨立理財顧問更改未來投資選擇分配
獨立理財顧問網上投資服務交易紀錄

獨立理財顧問更改未來投資選擇分配 28/02/2019 17:07

獨立理財顧問更改未來投資選擇分配 > 未來基金供款選擇 > 確認資料 > 完成

提交申請者: IFA-CONVOY-D001
申請編號: 7917
日期及時間: 28-Feb-2019 17:07

1

保單摘要:

保單編號: 000203591933
基金計劃編號: 「環球」(COLM)

申請詳情: 獨立理財顧問更改未來投資選擇分配

更改未來投資選擇分配:

基金公司	相關基金名稱	投資選擇編號	分配
安本國際基金管理有限公司	安本標準 - 澳洲股票基金 (A標累積(澳元))	F160	100%

2 列印版本 儲存版本 3

1. 交易記錄: 可讓用戶了解申請次序及狀況
2. 用戶可以” 列印版本” 為記錄
3. 用戶可以” 儲存版本” 為記錄

經銷商管理

- ✓ 轉換投資選擇
- ✓ 更改未來投資選擇分配
- ✓ 網上投資服務交易記錄



歡迎 XXXXXX
FINANCIAL SERVICES LIMITED

主頁 聯絡我們 更改密碼 登出

獨立理財顧問網上投資服務交易記錄 28/02/20

搜尋 提交申請時段: 過舊7天 1

今日
過舊7天
過舊14天
過舊30天

*溫馨提示: 所顯示在獨立理財顧問網上投資服務交易記錄的資料, 只包括閣下透過「財策服務系統獨立理財顧問網站」所提交的轉換投資選擇分配。

搜尋 搜尋 重設

申請編號	申請日期	保單編號	提交申請者	狀況	文件檔案
2 7917	28-Feb-2019 17:07	000203591933	IFA-CON/0Y-D001	已遞交	
7916	28-Feb-2019 16:51	000203591933	IFA-CON/0Y-D001	取消	
7915	28-Feb-2019 16:28	000203591933	IFA-CON/0Y-D001	已遞交	
7914	28-Feb-2019 16:01	000201760169	IFA-CON/0Y-D001	已遞交	

4

1. 用戶可以提交申請時段搜尋投資服務之申請
2. 用戶可根據申請編號查閱有關申請詳情
3. 申請日期
4. 用戶可查詢申請狀況*

* 交易記錄之申請狀況如下:

- 已遞交(有關申請已遞交)
- 取消(有關申請已取消)

搜尋

提交申請編號: [顯示7天]

[搜尋](#) [重設](#)

*溫馨提示: 所有顯示在獨立理財顧問網上投資服務交易記錄的資料, 只包括閣下透過「財策服務系統獨立理財顧問網站」所提交的轉投資選擇及更改未來投資選擇分配。

搜尋結果	申請編號	申請日期	申請類別	保單編號	提交申請者	狀況	文件檔案
1	7917	28-Feb-2019 17:07	獨立理財顧問更改未來投資選擇分配	000203591933	IFA-CON/VOY-D001	已過交	
	7916	28-Feb-2019 16:51	獨立理財顧問更改未來投資選擇分配	000203591933	IFA-CON/VOY-D001	取消	
	7915	28-Feb-2019 16:28	獨立理財顧問轉投資選擇	000203591933	IFA-CON/VOY-D001	已過交	
	7914	28-Feb-2019 16:01	獨立理財顧問轉投資選擇	000201760169	IFA-CON/VOY-D001	已過交	



歡迎登入 B.O.S.S. 財策服務系統 - Google Chrome

https://consultantportaluat.ftl.com.hk/sss_uat1/fundReallocComplete.do?AD69659A56471DE30EA779958543ADA68A17EDECEBC70...

FTLlife 富通保險

獨立理財顧問更改未來投資選擇分配 28/02/2019 17:43

提交申請者: IFA-CON/VOY-D001
申請編號: 7917
日期及時間: 28-Feb-2019 17:07

保單摘要:

保單編號: 000203591933
基本計劃編號: 「順博」(COLM)

申請詳情: 獨立理財顧問更改未來投資選擇分配

更改未來投資選擇分配:

基金公司	相關基金名稱	投資選擇編號	分配
安本國際基金管理有限公司	安本標準 - 澳洲股票基金 (A) (澳元)	F160	100%

1. 用戶可根據有關申請編號查閱詳情
2. 於點擊有關申請編號後, 將有訊息以顯示有關之申請種類、提交申請者身份、申請編號、日期及時間、交易摘要

業務查詢

- ✓ 下載保單摘要報告
- ✓ 保單摘要報告隊列

授權代表用戶 - 下載保單摘要報告



主頁 轉換用戶 還原用戶 聯絡我們 更改密碼 登出

歡迎 Ray Chan
as
SOUTHWEST
SECURITIES (HK)
WEALTH MANAGEMENT
LIMITED

- 銷售服務
- 銷售工具
- 社區服務
- 業務查詢
- 保單查詢
- 最新基金價格
- 醫生資料
- 保壽種類保單資料
- 自動貸款繳書保單資料
- 外幣兌換率查詢
- 客戶信件查詢
- 下載保單摘要報告
- 保單摘要報告隊列
- 短銷商管理

下載保單摘要報告

01/03/2019 10:10

保單編號

受保人或持有人姓名

基本計劃編號

保單狀況

排序方式

語言 英文 中文繁體

搜尋 重設

最多顯示 2000 條記錄

記錄數目 64

保單編號	受保人姓名	受保人中文姓名	保單持有人姓名	保單持有人中文姓名	保單日期	提交日期	下次繳壽到期日	基本計劃編號	保額 / 投保單位 / 每月保額入息	每期保費	保單狀況
<input type="checkbox"/> 000201556502					12/01/2011	12/01/2011	12/09/2017	COLM 20	383586	2500	生效 (10)
<input type="checkbox"/> 000201352265					13/09/2010	31/08/2010	13/04/2012	COLM 25	13237	1200	生效 (10)
<input type="checkbox"/> 000201589761					01/03/2011	18/02/2011	01/07/2015	COLM 25	86299	1800	生效 (10)
<input type="checkbox"/> 000202257428					29/06/2012	26/06/2012	29/10/2014	COLM 25	269922	800	生效 (10)
<input type="checkbox"/> 000202215571					09/06/2012	08/06/2012	09/03/2019	COLM 30	451914	10000	生效 (10)
<input type="checkbox"/> 000202119750					30/03/2012	30/03/2012	30/09/2013	COLM 25	68106	4000	生效 (10)
<input type="checkbox"/> 000202060829					23/02/2012	23/02/2012	23/07/2015	COLS2 25	40147	1000	生效 (10)
<input type="checkbox"/> 000202015564					26/01/2012	30/12/2011	26/03/2019	COLM 30	348152	4000	生效 (10)
<input type="checkbox"/> 000203604083					20/12/2014	19/12/2014	20/03/2019	COLM 25	40245	100	生效 (10)
<input type="checkbox"/> 000203600410					19/12/2014	18/12/2014	19/03/2019	COLM 20	14830	300	生效 (10)

全選 取消選擇

1 7

1. 用戶可根據不同要求選擇下載於保單摘要報告內的保單種類
2. 請選擇保單摘要報告之語言
3. 按下「搜尋」鍵去展示所有於同一獨立理財顧問公司之保單
4. 選擇有關保單下載保單摘要報告
5. 按「列印保單摘要」

授權代表用戶 - 下載保單摘要報告



1. 當已遞交下載保單摘要之要求，系統便會發出訊息予用戶以提醒有關指示已在處理中。而用戶亦可按於訊息上顯示之連結而轉載至「保單摘要報告隊列」查閱下載之狀況。

業務查詢

- ✓ 下載保單摘要報告
- ✓ 保單摘要報告隊列

授權代表用戶 - 保單摘要報告隊列



歡迎 Ray Chan 01/03/2019 10:58

保單摘要報告隊列 3 4

遞交編號	排列位置	報告名稱	用戶名稱	切換至	遞交時間	開始時間	完成時間	狀況
24429	0	下載保單摘要報告	Ray Chan		01/03/2019 10:26:07	01/03/2019 10:26:32	01/03/2019 10:26:32	已完成 (7KB)

1 2 3 4 5

更新

1 1

提示: 為確保財策服務系統能順利運作, 系統會定期清理所有已存放 7 日或以上的報告檔案。如有需要, 用戶可自行將個別檔案備份。

1. 「遞交編號」予用戶參考
2. 「排列位置」予用戶了解列印報告之位置
3. 給予用戶有關保單摘要下載之時間資料有多種狀況予以用戶參考, 例如「輪候中」、「進行中」及「已完成」。當狀況轉至「已完成」後便會出現連結, 用戶可按此連結下載「保單摘要」報告
5. 用戶可按「更新」鍵更新下載「保單摘要」之狀況*

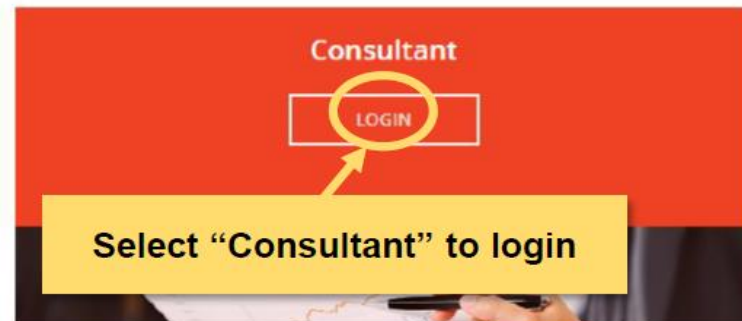
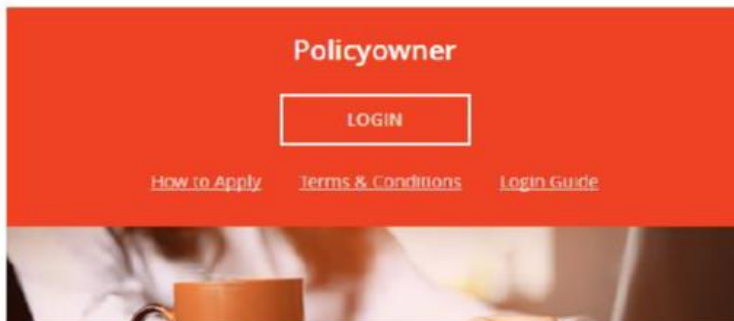
- 附件一 IFA Portal Password Policy (Final)
- 附件二 聲明
- 附件三 重要說明(投資選擇轉換)
- 附件四 重要說明(更改未來投資選擇分配)
- 附件五 常問問題

多謝!



**Business Oriented Support System
(B.O.S.S.) Consultant User Guide**

Login Page



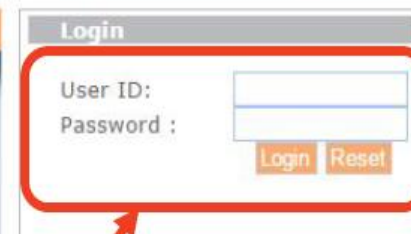
To ensure the best user experience, we recommend Google Chrome browser (Desktop) / Safari browser (iPad)



www.ftliffe.com.hk 繁體 简体



Welcome to B.O.S.S. 財策服務系統



Login

User ID:

Password :

Input User ID & Password, click “Login”

ABOUT SSL CERTIFICATES

* Please note that there is a forced password change requirement upon the first login and there is 30 days of password validity. Please refer to Appendix I for details of the password policy.



Terms And Conditions

Business Oriented Support System - Terms of Use

FTLife Insurance Company Limited ("FTLife") reserves any rights not expressly granted herein.

Business Oriented Support System ("this web site") is an Internet-based private portal site solely for authorized FTLife agents, corporate agencies (including their duly authorized responsible officers and technical representatives, if any), distribution channels (including without limitation insurance brokers and independent financial advisors) and staff only.

The Business Oriented Support System may contain e-mail services, bulletin board services, file download services, information inquiry services, electronic forms, financial needs analysis, insurance proposal and/or other message or communication facilities designed to enable authorized users to communicate with others and perform business supporting services (collectively, "Business Oriented Support System Services").

1. Modification of the Terms of Use

FTLife reserves the right to amend the terms, conditions, and notices contained herein ("Terms of Use") under which the Business Oriented Support System Services are offered. You are responsible for regularly reviewing the Terms of Use and any other additional terms posted on particular web sites associated with the Business Oriented Support System. Your continued use or visiting of this web site constitutes your agreement to all the Terms of Use and such other additional terms.

2. General

By clicking the "Accept" button, or visiting/accessing this web site and any of its pages, or using the Business Oriented Support System Services, you agree to abide by the Terms of Use.

You undertake fully and effectively to indemnify and keep indemnified at all times FTLife against all loss, damages, actions, proceedings, costs, claims, demands, liabilities and expenses whatsoever (including legal and other fees and disbursements) sustained, incurred or

Accept

Decline

Read the Terms and Conditions, and click "Accept" to enter B.O.S.S.

Friendly reminder:

- User should read through the Term & Conditions (T&C) before clicking on the "Accept" key. Please note that the T&C could be updated from time to time without prior notice.
- To address safety and data privacy concerns, you are reminded to log out immediately after use.

Login – User Reminder



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- IFA Future Investment Choice Reallocation
- Bulk IFA Investment Choice Switching
- Bulk IFA Future Investment Choice Reallocation
- IFA Investment eService Application Log

Main Menu

01/03/2019 12:11

Calendar

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consultantportaluat.ftlife.com.hk says

You will be logged out immediately as you have logged on the B.O.S.S. with another PC already.

If you discover or suspect that anyone has been using your account without your authorization or that there is any security vulnerability in the system; including but not limited to loss or theft of your user name and/or password information, you must inform FTLife Insurance Company Limited ("FTLife") immediately for further investigation and reset of your password.

OK

A friendly reminder: If user encounters concurrent login with message box shown above and it is suspected your user ID is used by others without authorization, you should contact Partnership Concierge for further assistant and report the case to Partnership Concierge.

Production Inquiry

- ✓ Investment Choice Switching
- ✓ Future Investment Choice Reallocation
- ✓ Investment eService Application Log

Delegated Representative User Investment Choice Switching



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Bulk IFA Investment Choice Switching

Bulk IFA Future Investment Choice Reallocation

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IFA Investment Choice Switching 01/03/2019 13:44

Search

Basic Plan Code*: **1**

Switch-out Underlying Fund*: **2**

Sort By: Policy No. Ascending

3 Search Reset

Search Result

Policy No.	Owner Name	Owner Chinese Name	Basic Plan Code	No. of record(s) found : 0
------------	------------	--------------------	-----------------	----------------------------

1 / 1

1. Basic plan selection

2. Selection of Switching-out Underlying Fund

3. Then press "Search" to list out those policies with the same underlying fund for switch out process

Delegated Representative User Investment Choice Switching



IFA Investment Choice Switching 01/03/2019 13:49

Search

Basic Plan Code*: COLM - "Columbus"

Switch-out Underlying Fund*: F154

Sort By: Policy No. Ascending

Search Result

Policy No.	Owner Name	Owner Chinese Name	Basic Plan Code	No. of record(s) found : 1
<input type="checkbox"/> 000203561933	Ma xxxxxx	馬部x	COLM	

Select / Unselect All

/ 1

1. Please select those policy/policies in relation to user's fund switch request;
2. Then press "Submit"

Delegated Representative User Investment Choice Switching

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IFA Investment Choice Switching

Policy Summary:

Policy Number : 000203591933

Basic Plan Code : "Columbus" (COLM)

01/03/2018 14:27

Please read the Important Notes below before you confirm your instruction:

- Important Notes**
- You are allowed to access this web site only when all of the following do:
 - a valid agreement in relation to Investment Advisory Services between you and FTLIFE;
 - a valid agreement between your company and the policyholder of the Relevant Policy Owner's policy, without consulting the Relevant Policy Owner;
 - a valid FTLIFE Authorization Form in relation to Investment Advisory Services submitted.
 ("Prerequisite I")
 - You must be properly authorized by your company to give investment instructions on behalf of the Relevant Policy Owner through this web site.
 - In the absence of Prerequisite I and/or Prerequisite II, use of this web site is subject to the terms and conditions of the FTLIFE Portal.
 - Use of this web site is subject to the terms and conditions of the FTLIFE Portal.
 - On the condition that both Prerequisite I and Prerequisite II are met, you may submit a request to switch out all units in the Relevant Policy Owner's policy account being less than the minimum holding requirement; or (ii) switch out all units in the Relevant Policy Owner's policy account being less than the minimum holding requirement.
 - The allocation percentage of redeemed amount for each switch-in under the site.
 - The total allocation percentage of redeemed amount should be 100%. If it is not, the switch-in request will be rejected.
 - The switch-in request in each transaction is for such transaction only and "IFA Future Investment Choice Reallocation" section of this web site.
 - The cut-off time for same-day processing is 3:00 p.m. on any Hong Kong business day.
 - Any failure to comply with the above conditions will result in delays in processing of your request.
 - If more than one request in respect of the same transaction received on the same day, the request received first will be processed.
 - If more than one request in respect of (i) the same transaction received on the same day and FTLIFE shall not be liable for any direct, indirect, special or consequential damages arising from the processing of such request(s).
 - If the previous request is still in progress, your new request(s) on behalf of the Relevant Policy Owner will be processed after the previous request(s) is/are completed.
 - Please note that your request(s) on behalf of the Relevant Policy Owner is/are subject to the availability of the underlying investment funds for their processing.

Investment involves risks. The past performance is not indicative of future performance and charges before making any investment decision.

Declaration

I, an authorized person of my company to give investment instructions on behalf of the Relevant Policy Owner, understand that FTLIFE will handle my request within a reasonable time, shall not be liable for any direct, indirect, special or consequential damages arising from the processing of such request(s).

For and on behalf of my company, I undertake to indemnify and keep FTLIFE and its agents harmless from and in respect of my act, omission or conduct or indirectly out of or in connection with, any act, omission, conduct by us through this website and/or the IFA Portal.

I confirm that I have read, understood and agreed to this Important Notes.

Note: In the event of any ambiguity or inconsistency between the English and Chinese versions of the terms herein, the English version will prevail.

Welcome to B.O.S.S. 財富服務系統 - Google Chrome

https://consultantportaluat.ftlife.com.hk/sss_uat1/investmentChoiceBalance.do?83FC02CE9880FAE6A422A25D216AAD48EE682B1A9E...

Policy Summary:

Policy Number : 000203591933

Basic Plan Code : "Columbus" (COLM)

Investment Choice(s) Balance Summary

Underlying Fund Name	No. of Unit			Unit Price in Underlying Fund Currency (Valuation Date)	Unit Value in Underlying Fund Currency			Total Unit Value in Underlying Fund Currency	Total Unit Value in Plan Currency (HK Dollar)	Weighted Percentage
	Initial Account	Accumulation Account	Top-up Account		Initial Account	Accumulation Account	Top-up Account			
Barings International Umbrella Fund - Barings ASEAN Frontiers Fund (Class A)	1.8334	1.7760	0.0000	USD190.75000 (22/11/2018)	USD349.79	USD338.84	USD0.00	688.63	5,371.31	11.18%
Aberdeen Standard - Indian Equity Fund (A-Acc USD)	0.1677	0.0000	0.0000	USD146.19349 (22/11/2018)	USD24.51	USD0.00	USD0.00	24.51	191.17	0.40%
Amundi Funds - CPR Global Lifestyles (A2U-Acc Shares)	3.2532	1.9060	0.0000	USD155.36000 (21/11/2018)	USD505.41	USD296.11	USD0.00	801.53	6,251.93	13.02%
PARVEST Equity USA Mid Cap (Classic USD - Capitalisation Shares)	0.0726	0.0000	0.0000	USD229.11000 (21/11/2018)	USD16.63	USD0.00	USD0.00	16.63	129.71	0.27%
Zeal Voyage China Fund - USD Units	297.4462	238.4140	0.0000	USD1.24400 (22/11/2018)	USD370.02	USD296.58	USD0.00	666.61	5,199.55	10.83%
JPMorgan China Pioneer A-Share Fund	8.6551	0.1003	0.0000	USD34.19000 (22/11/2018)	USD302.75	USD3.42	USD0.00	306.18	2,388.20	4.97%
Investec GSF Global Strategic Equity Fund (A-Acc Shares)	31.9765	16.7498	0.0000	USD26.70000 (22/11/2018)	USD853.77	USD447.21	USD0.00	1,300.99	10,147.72	21.13%
Aberdeen Standard - Asian Smaller Companies Fund (A-Acc USD)	11.3446	0.7480	0.0000	USD41.01520 (22/11/2018)	USD465.30	USD30.67	USD0.00	495.98	3,868.64	8.06%
Fidelity Funds - Malaysia Fund ("A" Shares)	12.0742	7.2211	0.0000	USD40.52000 (22/11/2018)	USD494.07	USD295.48	USD0.00	789.56	6,158.56	12.82%
Fidelity Funds - Pacific Fund ("A" Shares)	10.4572	10.0551	0.0000	USD33.73000 (22/11/2018)	USD342.26	USD329.10	USD0.00	671.36	5,236.60	10.90%
Fidelity Funds - Global Technology Fund ("A" Shares)	0.7940	0.0000	0.0000	EUR21.19000 (22/11/2018)	EUR16.82	EUR0.00	EUR0.00	16.82	148.61	0.31%
Templeton Thailand Fund ("A-Acc" Shares)	12.9673	0.5708	0.0000	USD27.77000 (22/11/2018)	USD360.10	USD15.85	USD0.00	375.95	2,932.41	6.11%
Total								HKD 48,024.41	100.00%	

- After submitting fund switching request, an important note is shown for user's information;
- User may click on the policy link to see the policy details
- After reading through the "Important Notes"*, then click "Next" for next step

* Please refer to Appendix III – "Important Notes" for details.

Delegated Representative User Investment Choice Switching

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Policy Summary:

Policy Number : 000203581933
Basic Plan Code : "Columbus" (COLM)

Please read the Important Notes

FAQ on Investment Choice Switching

1) Q: If I apply investment choice switching, what will be the transaction date and time and how to calculate the unit price?

A: Under normal circumstances, unit price of T+1 will be applied for the switching-out and unit price of T+4 will be applied for switching-in transaction. The investment choice switching transaction will be completed on T+5 and the result will be displayed in this web site on T+6.

Remarks: T is the Date of Submission and the request must be received by our cutoff time of 3pm daily (exclude Saturday and public holiday) via this web site.

2) Q: What makes the investment choice switching transaction complete in more than T+5?

A:

- Fund house holiday meaning price of investment choice is not available
- Fund house does not provide price of investment choice on time
- If either the switching-out or the switching-in investment choice is BNP Paribas L1 Fund
- Investment schedule changed by Fund House from time to time, if any
- Pending transaction of Investment Choice Switching Request
- Charge deduction takes place
- Incomplete information in the application document

3) Q: Would the submission in hard copy or via Customer e-Service be complied with the same service commitment?

A: No. If the request is submitted in hard copy or via Customer e-Service, unit price of T+1 will be applied for both the switching-out and switching-in transaction. The investment choice switching transaction will be completed on T+2 and the result will be displayed in this web site on T+3.

Remarks 1: T is the Date of Submission and the request must be received by our cutoff time of 3pm daily (exclude Saturday and public holiday) by mail or via Customer e-Service.

Remarks 2: If the transaction amount (per investment choice and per each investment choice switching transaction) exceeded HKD500,000, the valuation date for switch-out and switch-in cannot be guaranteed to be the same. However, Company will use the nearest available valuation date for the unit price for switch in.

4) Q: Can I submit more than one switching request in the same business day through this web site?

A: No. If more than one request in respect of the same transaction received on the same business day all through this web site, the latest request we receive will supersede the previous request.

Next >

Next > Cancel

Note: In the event of any ambiguity or inconsistency between the English and Chinese versions of the terms herein, the English version will prevail.

- After clicking on “Next”, a “FAQ”* will pop up to user as reference

* Please refer to Appendix IV –FAQ for reference

Delegated Representative User Investment Choice Switching



Policy Summary:
Policy Number : 000203581933
Basic Plan Code : "Columbus" (COLM)

Minimum switching amount per instruction is 1% of the policy account value.

Investment Choice Switching Selection
Please select your switch out option:
 I wish to switch out all the existing accrued benefits of the following underlying funds of the policy listed above into new investment choice.
 I wish to switch out the existing accrued benefits of the policy listed above according to the following:

Fund House	Underlying Fund Name	Investment Choice Code	No. of Units	Transfer Out by %	by Units
Aberdeen International Fund Managers Ltd	Aberdeen Standard - Indian Equity Fund (A Acc USD)	F154	0.1677	100	

Switch out 100% of current fund holding

Switch out partial % of current fund holding

Note: If the no. of units which you request to switch out is more than what you actually holding, we will process your request by switching out the maximum available units of your selected investment choice(s).

Please read the Important Notes below before you confirm your instruction.

Important Notes

- You are allowed to access this web site only when all of the following documents are still in force: -
 - a valid agreement in relation to Investment Advisory Services between FTLife Insurance Company Limited ("FTLife") and your company;
 - a valid agreement between your company and the policyholder of the relevant policy (the "Relevant Policy Owner") who has opted for your company's delegated investment services that has authorized your company (s) to make all investment decisions to alter the fund holdings and exercise all options for switching between funds within the Relevant Policy Owner's policy, without consulting the Relevant Policy Owner, and (b) to issue investment instruction to FTLife on behalf of the Relevant Policy Owner without the need to obtain the Relevant Policy Owner's consent; and
 - a valid FTLife Authorization Form in relation to Investment Advisory Services jointly signed by the Relevant Policy Owner and your company in which the Relevant Policy Owner has authorized FTLife to act upon investment instructions provided by your company without the need to obtain his/her signature on these instructions submitted.(Prerequisite I)
- You must be properly authorized by your company to give investment instructions on behalf of (i) the Relevant Policy Owner who has opted for your company's delegated investment services; and (ii) your company to FTLife. (Prerequisite II)
- In the absence of Prerequisite I and/or Prerequisite II, use of this web site is strictly prohibited. You must logout from this web site and the IFA Portal immediately. FTLife reserves the rights to claim for damages arising from this unauthorized use of this web site and/or the IFA Portal and may report the case to the Hong Kong Police Force if FTLife deems it necessary.
- Use of this web site is subject to the terms and conditions of the FTLife Authorization Form in relation to Investment Advisory Services jointly signed by the Relevant Policy Owner and your company and the agreement in relation to Investment Advisory Services between FTLife and your company.
- On the condition that both Prerequisite I and Prerequisite II are met, you may submit your request(s) through this web site on behalf of the Relevant Policy Owner to switch out any units of underlying fund in the Policy Owner's policy account. You can select to switch out (i) a percentage of such units (provided that the percentage must be in whole number); or (ii) an exact number of units (up to 4 decimal places).
- The request(s) you submit on behalf of the Relevant Policy Owner herein shall not be processed online and shall take effect on the date when such request(s) is approved by our company. After receipt of your request(s) on behalf of the Relevant Policy Owner and completion of processing such request(s), we will send to Relevant Policy Owner a confirmation statement. A copy of the same will be sent to you for your record.
- The request(s) you submit on behalf of the Relevant Policy Owner herein is subject to the minimum switching and remaining balance requirements determined by us from time to time under the terms of the relevant policy we issued to the Relevant Policy Owner. If the switch-out request will result in the remaining account value of any underlying fund in the Relevant Policy Owner's policy account being less than the minimum holding requirement, you may only submit request on behalf of the Relevant Policy Owner to switch out (i) an amount as a result of which the remaining account value of such underlying fund in the Relevant Policy Owner's policy account still meets the minimum holding requirement; or (ii) switch out all units in the Relevant Policy Owner's account in respect of such underlying fund.
- The allocation percentage of redeemed amount for each switch-in underlying fund provided in your request(s) on behalf of the Policy Owner is subject to the minimum allocation requirement determined by us from time to time.
- The total allocation percentage of redeemed amount should be 100%. If the total allocation percentage does not add up to 100%, you are required to adjust the allocation percentage manually to 100% on behalf of the Relevant Policy Owner in order to proceed submitting your request on behalf of the Relevant Policy Owner through this web site.
- The switch-in request in each transaction is for such transaction only and the investment choice(s) allocation percentage for future regular premium will remain unchanged. If you want to change the Relevant Policy Owner's investment choice(s) allocation for future regular premium on behalf of the Relevant Policy Owner, please complete the "IFA Future Investment Choice Reallocation" section of this web site.
- The cut-off time for same-day processing is 3:00 p.m. on any Hong Kong business day. Any request submitted after this time will be regarded as a request submitted on the next Hong Kong business day and handled by our company accordingly.
- Any failure to comply with the above conditions will result in delays in processing your request(s). Any unclear request will not be processed or effected, and revised written instructions will be required before we can proceed.
- If more than one request in respect of the same transaction received on the same business day through this web site, the latest request we receive will supersede the previous request.
- If more than one request in respect of (i) the same transaction received on the same business day through this web site or otherwise; or (ii) different transactions received on the same business day, FTLife has the sole discretion to determine the priority in dealing with such requests. In such event, it may take longer in executing such request(s) and FTLife shall not be liable for any direct, indirect, special or consequential loss or damages arising in this regard.
- If the previous request is still in progress, your new request(s) on behalf of the Relevant Policy Owner to switch out from the same underlying fund will not be processed until the processing of the previous request has been completed.
- Please note that your request(s) on behalf of the Relevant Policy Owner is subject to the monthly deduction provisions of the relevant policy we issued to the Relevant Policy Owner.

Investment involves risks. The past performance is not indicative of future performance. Investors should note that the investment return is subject to the normal market and currency risks. Please refer to the "Product Guide" and "Investment Guide" and the offering documents of the underlying investment funds for their details and charges before making any investment decision.

Declaration

I, an authorized person of my company to give investment instructions on behalf of (i) the Relevant Policy Owner who has opted for my company's delegated investment services; and (ii) my company to FTLife, hereby request and authorize FTLife to execute the above investment instruction for the policy account of the Relevant Policy Owner. I understand that FTLife will handle my request within a reasonable time, shall not be liable for any direct, indirect, special or consequential loss or damages arising from any delay and shall not be responsible for any loss or liability caused by the value of the Relevant Policy Owner's policy arising from and in respect of my act, omission or conduct through this web site and/or the IFA Portal.

For and on behalf of my company, I undertake to indemnify and keep FTLife and all other members of FTLife group and their respective directors, officers, agents and employees indemnified from and against and in respect of all losses, damages, liabilities, claims, costs and expenses which may be suffered or incurred by any of them arising directly or indirectly out of or in connection with, any act, omission, conduct by us through this website and/or the IFA Portal.

I confirm that I have read, understood and agreed to this Important Notes.

Note: In the event of any ambiguity or inconsistency between the English and Chinese versions of the terms herein, the English version will prevail.

Next Reset Cancel

- After clicking on "Next" of the FAQ, user could select 100% of fund or designated percentage of current fund holding

Delegated Representative User Investment Choice Switching



Policy Summary

Policy Number : 000203591933
Basic Plan Code : "Columbus" (COLM)

Switch Out:

Fund House	Underlying Fund Name	Investment Choice Code	Out
Aberdeen International Fund Managers Ltd	Aberdeen Standard - Indian Equity Fund (A Acc USD)	F154	100%

Switch In:

Fund House	Underlying Fund Name	Investment Choice Code	Allocation
1.			<input type="text"/> %
2.			<input type="text"/> %
3.	Aberdeen International Fund Managers Ltd		<input type="text"/> %
4.	Allianz Global Investors Hong Kong Ltd		<input type="text"/> %
5.	Amundi Asset Management		<input type="text"/> %
6.	Amundi Hong Kong Limited		<input type="text"/> %
7.	BNP Paribas Asset Management Asia Limited		<input type="text"/> %
8.	Baring Asset Management		<input type="text"/> %
9.	BlackRock (Hong Kong) Ltd		<input type="text"/> %
10.	CCB International Asset Management Ltd		<input type="text"/> %
	FIL Investment Management (Hong Kong) Ltd		<input type="text"/> %
	First State Investments (HK) Limited		<input type="text"/> %
	Franklin Templeton Investment (Asia) Ltd		<input type="text"/> %
	Haitong International Investment Managers Limited		<input type="text"/> %
	Income Partners Asset Management (HK) Limited		<input type="text"/> %
	Invesco Asset Management (Asia) Limited		<input type="text"/> %
	Invesco Hong Kong Ltd		<input type="text"/> %
	Invesco Asset Management Asia Ltd		<input type="text"/> %
	J.P. Morgan Asset Management		<input type="text"/> %
	Janus Henderson Investors Hong Kong Limited		<input type="text"/> %
	Jupiter Asset Management Limited		<input type="text"/> %

4 Next > Reset Cancel < Back

1. Choose the fund house which user may want to select;
2. Select the fund
3. Input percentage, please note that the total switch in percentage should be 100%
4. Click "Next"

Delegated Representative User Investment Choice Switching

Policy Summary:

Policy Number : 000203591933
Basic Plan Code : "Columbus" (COLM)

Investment Choice Switching:

Switch Out:

Fund House	Underlying Fund Name	Investment Choice Code	Out
Aberdeen International Fund Managers Ltd	Aberdeen Standard - Indian Equity Fund (A Aot USD)	F154	100%

Switch In:

Fund House	Underlying Fund Name	Investment Choice Code	In
Baring Asset Management	Baring International Bond Fund	F103	100%

Please read the Important Notes below before you confirm your instruction:

Important Notes

- You are allowed to access this web site only when all of the following documents are still in force: -
 - a valid agreement in relation to Investment Advisory Services between FTLife Insurance Company Limited ("FTLife") and your company;
 - a valid agreement between your company and the policyholder of the relevant policy (the "Relevant Policy Owner") who has opted for your company's delegated investment services that has authorized your company (a) to make all investment decisions to alter the fund holdings and exercise all options for switching between funds within the Relevant Policy Owner's policy, without consulting the Relevant Policy Owner; and (b) to issue investment instruction to FTLife on behalf of the Relevant Policy Owner without the need to obtain the Relevant Policy Owner's consent; and
 - a valid FTLife Authorization Form in relation to Investment Advisory Services jointly signed by the Relevant Policy Owner and your company in which the Relevant Policy Owner has authorized FTLife to act upon investment instructions provided by your company without the need to obtain his/her signature on these instructions submitted. ("Prerequisite I")
- You must be properly authorized by your company to give investment instructions on behalf of (i) the Relevant Policy Owner who has opted for your company's delegated investment services; and (ii) your company to FTLife. ("Prerequisite II")
- In the absence of Prerequisite I and/or Prerequisite II, use of this web site is strictly prohibited. You must logout from this web site and the IFA Portal immediately. FTLife reserves the rights to claim for damages arising from this unauthorized use of this web site and/or the IFA Portal and may report the case to the Hong Kong Police Force if FTLife deems it necessary.
- Use of this web site is subject to the terms and conditions of the FTLife Authorization Form in relation to Investment Advisory Services jointly signed by the Relevant Policy Owner and your company and the agreement in relation to Investment Advisory Services between FTLife and your company.
- On the condition that both Prerequisite I and Prerequisite II are met, you may submit your request(s) through this web site on behalf of the Relevant Policy Owner to switch out any units of underlying fund in the Policy Owner's policy account. You can select to switch out (i) a percentage of such units (provided that the percentage must be in whole number); or (ii) an exact number of units (up to 4 decimal places).
- The request(s) you submit on behalf of the Relevant Policy Owner herein shall not be processed online and shall take effect on the date when such request(s) is approved by our company. After receipt of your request(s) will be sent to you for your record.
- The request(s) you submit on behalf of the Relevant Policy Owner herein is subject to the minimum switching and remaining balance requirements determined by us from time to time under the terms of the relevant policy account being less than the minimum holding requirement, you may only submit request on behalf of the Relevant Policy Owner to switch out (i) an amount as a result of which the remaining account value of such unit respect of such underlying fund.
- The allocation percentage of redeemed amount for each switch-in underlying fund provided in your request(s) on behalf of the Policy Owner is subject to the minimum allocation requirement determined by us from time to time.
- The total allocation percentage of redeemed amount should be 100%. If the total allocation percentage does not add up to 100%, you are required to adjust the allocation percentage manually to 100% on behalf of the Policy Owner.
- The switch-in request in each transaction is for such transaction only and the investment choice(s) allocation percentage for future regular premium will remain unchanged. If you want to change the Relevant Policy Owner section of this web site.
- The cut-off time for same-day processing is 3:00 p.m. on any Hong Kong business day. Any request submitted after this time will be regarded as a request submitted on the next Hong Kong business day and handled by us on the next business day.
- Any failure to comply with the above conditions will result in delays in processing your request(s). Any unclear request will not be processed or effected, and revised written instructions will be required before we can proceed.
- If more than one request in respect of the same transaction received on the same business day through this web site, the latest request we receive will supersede the previous request.
- If more than one request in respect of (i) the same transaction received on the same business day through this web site or otherwise; or (ii) different transactions received on the same business day, FTLife has the sole discretion to process the request(s) in the order of receipt.
- If the previous request is still in progress, your new request(s) on behalf of the Relevant Policy Owner to switch out from the same underlying fund will not be processed until the processing of the previous request has been completed.
- Please note that your request(s) on behalf of the Relevant Policy Owner is subject to the monthly deduction provisions of the relevant policy we issued to the Relevant Policy Owner.

Investment involves risks. The past performance is not indicative of future performance. Investors should note that the investment return is subject to the normal market and currency risks. Please refer to the investment decision.

Declaration

I, an authorized person of my company to give investment instructions on behalf of (i) the Relevant Policy Owner who has opted for my company's delegated investment services; and (ii) my company to FTLife, hereby request and authorize FTLife to execute the above investment instruction for the policy account of the Relevant Policy Owner. I understand that FTLife will handle my request within a reasonable time, shall not be liable for any direct, indirect, special or consequential loss or damages arising from any delay and shall not be responsible for any loss or liability caused to the value of the Relevant Policy Owner's policy arising from and in respect of my act, omission or conduct through this web site and/or the IFA Portal. For and on behalf of my company, I undertake to indemnify and keep FTLife and all other members of FTLife group and their respective directors, officers, agents and employees indemnified from and against and in respect of all losses, damages, liabilities, claims, costs and expenses which may be suffered or incurred by any of them arising directly or indirectly out of or in connection with any act, omission, conduct by us through this website and/or the IFA Portal.

I confirm that I have read, understood and agreed to this Important Notes.

Note: In the event of any ambiguity or inconsistency between the English and Chinese versions of the terms herein, the English version will prevail.

Confirm Cancel < Back

consultantportaluat.ftlife.com.hk says

This instruction will be handled on the next Hong Kong business day

OK

1. Click "Confirm" to proceed
2. A message box will pop up to remind user that the instruction will be handled on the next HK Business Day if submission is made after the cut off time

Delegated Representative User Future Investment Choice Reallocation



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Application Log

IFA Investment Choice Switching

01/03/2019 16:28

IFA Investment Choice Switching > Switch Out > Switch In > Data Confirmation > Completed

Application Submitted by : IFA-CONVOY-0001

Application Number : 7918

Date and Time : 01-Mar-2019 16:28

1

Policy Summary:

Policy Number : 000203591933

Basic Plan Code : "Columbus" (COLM)

Request Detail: IFA Investment Choice Switching

Switch Out:

Fund House	Underlying Fund Name	Investment Choice Code	Out
Aberdeen International Fund Managers Ltd	Aberdeen Standard - Indian Equity Fund (A Acc USD)	F154	100%

Switch In:

Fund House	Underlying Fund Name	Investment Choice Code	In
Aberdeen International Fund Managers Ltd	Aberdeen Standard - Latin American Equity Fund (A Acc USD)	F155	100%

2

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Apply Future Investment Choice Reallocation

4

3

1. Application Log: to let user know the application sequence and the status

2. User can print the "Confirmation" for record

3. User can save the soft copy of "Confirmation" for record

4. If user would like to apply the same portfolio of switching in to future contribution, just click on No. 4 button to proceed

Delegated Representative User Future Investment Choice Reallocation

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01/03/2019 16:40

IFA Future Investment Choice Reallocation

IFA Future Investment Choice Reallocation > Future Investment Selection > Data Confirmation

Policy Summary:

Policy Number: 000203591933
Basic Plan Code: *Columbus (COLM)

Selection of Future Investment Choice:			
Fund House	Underlying Fund Name	Investment Choice Code	Allocation
Aberdeen International Fund Managers Ltd	Aberdeen Standard - Latin American Equity Fund (A Acc USD)	F155	100%

Please read the Important Notes below before you confirm your instruction:

Important Notes

- You are allowed to access this web site only when all of the following documents are still in force: -
 - a valid agreement in relation to Investment Advisory Services between FTLife Insurance Company and your company;
 - a valid agreement between your company and the policyholder of the relevant policy (the "Relevant Policy Owner") consulting the Relevant Policy Owner; and (b) to issue investment instruction to FTLife on behalf of the Relevant Policy Owner;
 - a valid FTLife Authorization Form in relation to Investment Advisory Services jointly signed by you and the Relevant Policy Owner ("Prerequisite I");
 - a valid FTLife Authorization Form in relation to Investment Advisory Services jointly signed by you and the Relevant Policy Owner ("Prerequisite II").
- You must be properly authorized by your company to give investment instructions on behalf of (i) the Relevant Policy Owner and (ii) your company. In the absence of Prerequisite I and/or Prerequisite II, use of this web site is strictly prohibited. You must be properly authorized by your company to give investment instructions on behalf of (i) the Relevant Policy Owner and (ii) your company.
- Use of this web site is subject to the terms and conditions of the FTLife Authorization Form in relation to Investment Advisory Services.
- On the condition that both Prerequisite I and Prerequisite II are met, you may submit your request(s) on behalf of the Relevant Policy Owner through this web site.
- The allocation percentage on each underlying fund to be provided in your request(s) on behalf of the Relevant Policy Owner through this web site.
- The total allocation percentage for the Relevant Policy Owner's future regular premium should be 100%.
- You should note that the investment choice(s) allocation percentage you request to change through the "Future Investment Choice Switching" section of this web site.
- The request(s) you submit on behalf of the Relevant Policy Owner herein shall not be processed online and shall take effect on the date when such request(s) is approved by our company. After receipt of your request(s) on behalf of the Relevant Policy Owner, the request(s) will be sent to you for your record.
- The cut-off time for same-day processing is 3:00 p.m. on any Hong Kong business day. Any request submitted after this time will be regarded as a request submitted on the next Hong Kong business day and handled by our company on the next Hong Kong business day.
- Any failure to comply with the above conditions will result in delays in processing your request(s). Any unclear request will not be processed or effected, and revised written instructions will be required before we can proceed.
- If more than one request is received on the same business day through this web site, the latest request we receive will supersede the previous request.
- If more than one request is received on the same business day through this web site or otherwise, FTLife has the sole discretion to determine the priority in dealing with such requests. In such event, it may take longer in effecting the request(s).

Investment involves risks. The past performance is not indicative of future performance. Investors should note that the investment return is subject to the normal market and currency risks. Please refer to the "Investment Decision" section of the FTLife Authorization Form for more details.

Declaration

I, an authorized person of my company to give investment instructions on behalf of (i) the Relevant Policy Owner who has opted for my company's delegated investment services; and (ii) my company to FTLife, hereby request you to process my request(s) on behalf of the Relevant Policy Owner through this web site. I understand and agree that my company and I shall not be liable for any direct, indirect, special or consequential loss or damages arising from any delay and shall not be responsible for any loss or liability caused to the Relevant Policy Owner by you or FTLife. For and on behalf of my company, I undertake to indemnify and keep FTLife and all other members of FTLife group and their respective directors, officers, agents and employees indemnified from and against and in respect of any loss or liability caused to the Relevant Policy Owner by you or FTLife through this web site and/or the IFA Portal.

I confirm that I have read, understood and agreed to this Important Notes.

Note: In the event of any ambiguity or inconsistency between the English and Chinese versions of the terms herein, the English version will prevail.

consultantportaluat.ftlife.com.hk says
New investment choice allocation percentage is only applicable to the premium paid after this request becomes effective.

OK Cancel

consultantportaluat.ftlife.com.hk says
This instruction will be handled on the next Hong Kong business day

OK

Confirm Cancel < Back

- After clicking on "Applying Future Investment Choice Reallocation" and confirm the transaction, a message box will pop up to remind user that the allocation is applicable to further contribution
- After clicking on "OK", system will confirm user that instruction will be handled on the next HK Business Day if the submission is made after the cut off time.

Delegated Representative User Future Investment Choice Reallocation



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IFA Future Investment Choice Reallocation

01/03/2019 16:44

IFA Future Investment Choice Reallocation > Future Investment Selection > Data Confirmation > Completed

Application Submitted by: IFA-CONVOY-0001
Application Number: 7919
Date and Time: 01-Mar-2019 16:44

Policy Summary:

Policy Number: 000203591933
Basic Plan Code: "Columbus" (COLM)

Request Detail: IFA Future Investment Choice Reallocation

Future Investment Choice Reallocation:

Fund House	Underlying Fund Name	Investment Choice Code	Allocation
Aberdeen International Fund Managers Ltd	Aberdeen Standard - Latin American Equity Fund (A Acc USD)	F166	100%

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User can select to print out the confirmation or save the soft copy for record.

Production Inquiry

- ✓ Investment Choice Switching
- ✓ Future Investment Choice Reallocation
- ✓ Investment eService Application Log

Delegated Representative User

Future Investment Choice Reallocation



Search

Basic Plan Code : COLM - "Columbus" 1

Existing Underlying Fund : F154 2

Sort By : Policy No. Ascending

[Search](#) [Reset](#)

Search 3

Policy No.	Owner Name	Owner Chinese Name	Basic Plan Code	No. of record(s) found : 1
000203691933	Ma xxxxxx	馬影x	COLM	

Select / Unselect All [Submit](#) 4

1 / 1

1. Basic plan selection
2. Select underlying funds –to extract those policies with the same fund
3. Select those policies in relation to the user’s request for future investment choice reallocation
4. Click “Submit” to proceed

Delegated Representative User Future Investment Choice Reallocation



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- Bulk IFA Future Investment Choice Reallocation
- IFA Investment eService Application Log

IFA Future Investment Choice Reallocation

IFA Future Investment Choice Reallocation

14/03/2016 13:4

Policy Summary:

Policy Number: **2** **00003591933**

Basic Plan Code: "Columbus" (COLM)

Please read the Important Notes below before you confirm your instruction:

Important Notes

- You are allowed to access this web site only when all of the following documents are submitted:
 - a valid agreement in relation to Investment Advisory Services between FTLIFE and your company;
 - a valid agreement between your company and the policyholder of the relevant policy, and (b) to issue investment instruction to the Relevant Policy Owner; and
 - a valid FTLIFE Authorization Form in relation to Investment Advisory Services ("Prerequisite I")
- You must be properly authorized by your company to give investment instructions on behalf of the Relevant Policy Owner.
- In the absence of Prerequisite I and/or Prerequisite II, use of this web site is strictly prohibited.
- Use of this web site is subject to the terms and conditions of the FTLIFE Authorization Form.
- On the condition that both Prerequisite I and Prerequisite II are met, you may submit your request.
- The allocation percentage on each underlying fund to be provided in your request(s) on behalf of the Relevant Policy Owner.
- The total allocation percentage for the Relevant Policy Owner's future regular premium must not exceed 100%.
- You should note that the investment choice(s) allocation percentage you request to the Relevant Policy Owner in the "Choice Switching" section of this web site.
- The request(s) you submit on behalf of the Relevant Policy Owner herein shall not be processed until you have submitted a valid Prerequisite I and Prerequisite II to FTLIFE. A copy of the same will be sent to you for your record.
- The out-of-time for same-day processing is 3:00 p.m. on any Hong Kong business day.
- Any failure to comply with the above conditions will result in delays in processing your request.
- If more than one request is received on the same business day through this web site, the request received first will be processed.
- If more than one request is received on the same business day through this web site of the Relevant Policy Owner, the request received first will be processed.

Investment involves risks. The past performance is not indicative of future performance. Investment decision.

Declaration

I, an authorized person of my company to give investment instructions on behalf of (i) the Relevant Policy Owner who has opted for my company's delegated investment services; and (ii) my company to FTLIFE, hereby request and authorize FTLIFE to execute the above investment instruction for the policy account of the Relevant Policy Owner. I understand that FTLIFE will handle my request within a reasonable time, shall not be liable for any direct, indirect, special or consequential loss or damages arising from any delay and shall not be responsible for any loss or liability caused to the value of the Relevant Policy Owner's policy arising from and in respect of my act, omission or conduct through this web site and/or the IFA Portal.

For and on behalf of my company, I undertake to indemnify and keep FTLIFE and all other members of FTLIFE group and their respective directors, officers, agents and employees indemnified from and against and in respect of all losses, damages, liabilities, claims, costs and expenses which may be suffered or incurred by any of them arising directly or indirectly out of or in connection with, any act, omission, conduct by us through this web site and/or the IFA Portal.

I confirm that I have read, understood and agreed to this Important Notes.

Note: In the event of any ambiguity or inconsistency between the English and Chinese versions of the terms herein, the English version will prevail.

Welcome to B.O.S.S. 財富服務系統 - Google Chrome

https://consultantportaluat.ftlfe.com.hk/sss_uat1/investmentAllocation.do?7D3B3F63F830781F5C0183B4CCDD1E5A002AC1A5379594B...

Policy Summary:

Policy Number: 0003591933
Basic Plan Code: "Columbus" (COLM)

Investment Choice(s) Allocation

Underlying Fund Name (Investment Choice - Code)	Basic Premium Allocation	Regular Top-up Premium Allocation
Barings International Umbrella Fund - Barings ASEAN Frontiers Fund (Class A) (F148)	10%	NA
Amundi Funds - CPR Global Lifestyles (A2U-Acc Shares) (F188)	10%	NA
Zaai Voyage China Fund - USD Units (F217)	10%	NA
JPMorgan China Pioneer A-Share Fund (F225)	10%	NA
Investec GSF Global Strategic Equity Fund (A-Acc Shares) (F78)	20%	NA
Aberdeen Standard - Asian Smaller Companies Fund (A Acc USD) (F63)	10%	NA
Fidelity Funds - Malaysia Fund ("A" Shares) (FMALF)	10%	NA
Fidelity Funds - Pacific Fund ("A" Shares) (FPACA)	10%	NA
Templeton Thailand Fund ("A-Acc" Shares) (TEMTHA)	10%	NA

Close

3 Next > Cancel

- After submitting Future Investment Choice request, an important note is shown for user's information;
- User may click on the policy link to see the policy details
- Then click "Next" for next step

Delegated Representative User Future Investment Choice Reallocation



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IFA Future Investment Choice Reallocation

IFA Future Investment Choice Reallocation > Future Investment Selection

14/03/2019 14:00

Policy Summary:

Policy Number: 000203591933
Basic Plan Code: "Columbus" (COLM)

Reallocation of Future Investment Choice Contribution:

Fund House	Underlying Fund Name	Investment Choice Code	Allocation
1. Aberdeen International Fund Managers Ltd	F155 Aberdeen Standard - Latin American Equity Fund (A Acc USD)	F155	100%
2.			%
3.			%
4.			%
5.			%
6.			%
7.			%
8.			%
9.			%
10.			%

[2](#) [Next >](#) [Reset](#) [Cancel](#)

1. Choose Future Investment Choice and share %
2. Then click "Next" for next step

Delegated Representative User Future Investment Choice Reallocation

consultantportaluat.ftlife.com.hk says

New investment choice allocation percentage is only applicable to the premium paid after this request becomes effective.

OK

Cancel



IFA Future Investment Choice Reallocation

IFA Future Investment Choice Reallocation > Future Investment Selection > Data Confirmation

Policy Summary:

Policy Number: 00003861933
Basic Plan Code: "Columbus" (COLM)

Selection of Future Investment Choice:

Fund House	Underlying Fund Name	Investment Choice Code	Allocation
Aberdeen International Fund Managers Ltd	Aberdeen Standard - Latin American Equity Fund (A Acc USD)	F155	100%

Please read the Important Notes below before you confirm your instruction:

Important Notes

1. You are allowed to access this web site only when all of the following documents are still in force: -

- (i) a valid agreement in relation to Investment Advisory Services between FTLife Insurance Company Limited ("FTLife") and your company;
- (ii) a valid agreement between your company and the policyholder of the relevant policy (the "Relevant Policy Owner") who has opted for your company's delegated investment services that has authorized your company (a) to make all investment decisions to alter the fund holdings and exercise all options for switching between funds within the Relevant Policy Owner's policy, without consulting the Relevant Policy Owner; and (b) to issue investment instruction to FTLife on behalf of the Relevant Policy Owner without the need to obtain the Relevant Policy Owner's consent; and
- (iii) a valid FTLife Authorization Form in relation to Investment Advisory Services jointly signed by the Relevant Policy Owner and your company in which the Relevant Policy Owner has authorized FTLife to act upon investment instructions provided by your company without the need to obtain his/her signature on these instructions submitted.

(*Prerequisite I)

2. You must be properly authorized by your company to give investment instructions on behalf of (i) the Relevant Policy Owner who has opted for your company's delegated investment services; and (ii) your company to FTLife. (*Prerequisite II)

3. In the absence of Prerequisite I and/or Prerequisite II, use of this web site is strictly prohibited. You must logout from this web site and the IFA Portal immediately. FTLife reserves the rights to claim for damages arising from this unauthorized use of this web site and/or the IFA Portal and may report the case to the Hong Kong Police Force if FTLife deems it necessary.

4. Use of this web site is subject to the terms and conditions of the FTLife Authorization Form in relation to Investment Advisory Services jointly signed by the Relevant Policy Owner and your company and the agreement in relation to Investment Advisory Services between FTLife and your company.

5. On the condition that both Prerequisite I and Prerequisite II are met, you may submit your request(s) through this web site on behalf of the Relevant Policy Owner to change the Relevant Policy Owner's investment choice(s) allocation percentage for his/her future regular premium to be paid.

6. The allocation percentage on each underlying fund to be provided in your request(s) on behalf of the Relevant Policy Owner is subject to the minimum allocation requirement determined by us from time to time. The percentage must be a whole number.

7. The total allocation percentage for the Relevant Policy Owner's future regular premium should be 100%. If the total allocation percentage for the Relevant Policy Owner's future regular premium does not add up to 100% in total, you are required to adjust the allocation percentage manually to 100% on behalf of the Relevant Policy Owner in order to proceed submitting your request on behalf of the Relevant Policy Owner through this web site.

8. You should note that the investment choice(s) allocation percentage you request to change through this web site on behalf of the Relevant Policy Owner only applies to the premium paid after the completion of processing such request. If you wish to change the Relevant Policy Owner's existing investment holdings on behalf of the Relevant Policy Owner, please complete the "IFA Investment Choice Switching" section of this web site.

9. The request(s) you submit on behalf of the Relevant Policy Owner herein shall not be processed online and shall take effect on the date when such request(s) is approved by our company. After receipt of your request(s) on behalf of the Relevant Policy Owner and completion of processing such request(s), we will send to Relevant Policy Owner a confirmation statement. A copy of the same will be sent to you for your record.

10. The cut-off time for same-day processing is 3:00 p.m. on any Hong Kong business day. Any request submitted after this time will be regarded as a request submitted on the next Hong Kong business day and handled by our company accordingly.

11. Any failure to comply with the above conditions will result in delays in processing your request(s). Any unclear request will not be processed or effected, and revised written instructions will be required before we can proceed.

12. If more than one request is received on the same business day through this web site, the latest request we receive will supersede the previous request.

13. If more than one request is received on the same business day through this web site or otherwise, FTLife has the sole discretion to determine the priority in dealing with such requests. In such event, it may take longer in executing such request(s) and FTLife shall not be liable for any direct, indirect, special or consequential loss or damages arising in this regard.

Investment involves risks. The past performance is not indicative of future performance. Investors should note that the investment return is subject to the normal market and currency risks. Please refer to the "Product Guide" and "Investment Guide" and the offering documents of the underlying investment funds for their details and charges before making any investment decision.

Declaration

I, an authorized person of my company to give investment instructions on behalf of (i) the Relevant Policy Owner who has opted for my company's delegated investment services; and (ii) my company to FTLife, hereby request and authorize FTLIFE to execute the above investment instruction for the policy account of the Relevant Policy Owner. I understand that FTLIFE will handle my request within a reasonable time, shall not be liable for any direct, indirect, special or consequential loss or damages arising from any delay and shall not be responsible for any loss or liability caused to the value of the Relevant Policy Owner's policy arising from and in respect of my act, omission or conduct through this web site and/or the IFA Portal.

For and on behalf of my company, I undertake to indemnify and keep FTLife and all other members of FTLife group and their respective directors, officers, agents and employees indemnified from and against and in respect of all losses, damages, liabilities, claims, costs and expenses which may be suffered or incurred by any of them arising directly or indirectly out of or in connection with, any act, omission, conduct by us through this web site and/or the IFA Portal.

I confirm that I have read, understood and agreed to this Important Notes.

Note: In the event of any ambiguity or inconsistency between the English and Chinese versions of the terms herein, the English version will prevail.

Confirm

Cancel

< Back

1. Click "Confirm" to proceed
2. A message box will pop up to remind user that the instruction will be applicable to the premium paid after this request is accepted and the reallocation becomes effective

Delegated Representative User Future Investment Choice Reallocation



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- IFA Investment eService
Application Log

IFA Future Investment Choice Reallocation

IFA Future Investment Choice Reallocation > Future Investment Selection > Data Confirmation > Completed

Application Submitted by: IFA/CONVOY-D001
Application Number: 7921
Date and Time: 14/03/2019 14:12

Policy Summary:

Policy Number: 000202591933
Basic Plan Code: "Columbus" (COLM)

Request Detail: IFA Future Investment Choice Reallocation

Future Investment Choice Reallocation:

Fund House	Underlying Fund Name	Investment Choice Code	Allocation
Aberdeen International Fund Managers Ltd	Aberdeen Standard - Latin American Equity Fund (A.Acc USD)	F155	100%

2

Printable Copy Save Copy

3

1. Application Log: to let user know the application sequence and the status
2. User can print out "Confirmation" for record
3. User can save the soft copy of "Confirmation" for record

Production Inquiry

- ✓ Investment Choice Switching
- ✓ Future Investment Choice Reallocation
- ✓ Investment eService Application Log

Delegated Representative User Future Investment eService Application Log



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- IFA Investment eService
Application Log

IFA Investment eService Application Log

14/03/2019

Search

Application Submitted Period :

- All
- Today Only
- Last 7 Days
- Last 14 Days
- Last 30 Days
- This Month

1

Search Reset

*Friendly reminder: Please be reminded that the information shown on the IFA Investment eService Application Log only indicates the Investment Choice Switching and Investment Choice Reallocation that is submitted via "B.O.S.S. IFA Portal".

Search Result

Application No.	Application Date	Application	Policy Number	Application Submitted by	Status	Correspondence
2 7921	3 14-Mar-2019 14:12	IFA Future Investment Choice Reallocation	000203591933	4 IFA-CONV/OY-0001	Submitted	

1. User can search by the period during which the application is submitted
2. User may refer to particular application no. for application details
3. Application submission date
4. User can also check the application status*

* The status of the application log are:

- Submitted (the application was submitted)
- Cancelled (the application was cancelled)

Delegated Representative User Future Investment eService Application Log



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Welcome XXXXXX FINANCIAL SERVICES LIMITED 14/03/2019 14:21

IFA Investment eService Application Log

Search Application Submitted Period: Last 30 Days Search Reset


*Friendly reminder: Please be reminded that the information shown on the IFA Investment eService Application Log only indicates the Investment Choice Switching and Future Investment Choice Reallocation that is submitted via "B.O.S.S. IFA Portal".

Application No.	Application Date	Application Type	Policy Number	Application Submitted by	Status	Correspondence
7921	14-Mar-2019 14:12	IFA Future Investment Choice Reallocation	000203591933	IFA-CONVOY-0001	Submitted	
7920	05-Mar-2019 14:16	IFA Investment Choice Switching	000203591933	IFA-CONVOY-0001	Submitted	
7919	01-Mar-2019 16:44				Submitted	
7918	01-Mar-2019 16:28				Submitted	
7917	28-Feb-2019 17:07				Cancelled	
7916	28-Feb-2019 16:51				Cancelled	
7915	28-Feb-2019 16:28				Submitted	
7914	28-Feb-2019 16:01				Submitted	

Search Result

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https://consultantportaluat.ftlfe.com.hk/sss_uat1/fundReallocComplete.do?7D3B3F63F830781F5C0183B4CCDD1E5A002AC1A537959488E3...



IFA Future Investment Choice Reallocation 14/03/2019 14:21

Application Submitted by: IFA-CONVOY-0001
Application Number: 7921
Date and Time: 14-Mar-2019 14:12

Policy Summary:
Policy Number: 000203591933
Basic Plan Code: "Columbus" (COLM)

Request Detail: IFA Future Investment Choice Reallocation

Future Investment Choice Reallocation:			
Fund House	Underlying Fund Name	Investment Choice Code	Allocation
Aberdeen International Fund Managers Ltd	Aberdeen Standard - Latin American Equity Fund (A Acc USD)	F155	100%

1. User can refer to particular application no. for details
2. After clicking on particular application no., a message box will pop up to show type of request submission, user ID, application no., submission date and time and the transaction details

Production Inquiry

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Welcome 14/03/2019 14:43

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1

Policy No
Insured or Owner Name cheng
Basic Plan Code
Policy Status

Sort By

2

Language English Traditional Chinese

3

Search Reset

No. of records(s) found: 366

Maximum 2000 records will be shown

Policy No	Insured Name	Insured Chinese Name	Owner Name	Owner Chinese Name	Policy Date	Submit Date	Premium Due Date	Basic Plan Code	Sum Insured / Units / Guaranteed Monthly Income	Modal Premium	Policy Status
<input type="checkbox"/> 000200545132					15/12/2008	12/12/2008	15/01/2014	COLM 10	8675	0	Inforce (18)
<input type="checkbox"/> 000200568744					23/12/2008	22/12/2008	23/01/2014	COLM 15	12782	1200	Inforce (10)
<input type="checkbox"/> 000200601059					08/01/2009	08/01/2009	08/08/2010	COLM 20	25631	2400	Inforce (10)
<input type="checkbox"/> 000201277719					29/06/2010	29/06/2010	29/08/2012	COLM 25	57225	2000	Inforce (10)
<input type="checkbox"/> 000200614061					20/01/2009	20/01/2009	20/08/2013	COLM 25	7559	150	Inforce (10)
<input type="checkbox"/> 000200794760					29/05/2009	29/05/2009	29/11/2010	COLM 25	17938	7000	Inforce (10)
<input type="checkbox"/> 000200916980					08/09/2009	08/09/2009	08/03/2011	COLM 10	7696	500	Inforce (10)
<input type="checkbox"/> 000200930613					02/11/2009	21/09/2009	02/11/2017	COLM 25	13191	950	Inforce (10)
<input type="checkbox"/> 000200886843					18/08/2009	14/08/2009	18/03/2019	COLM 10	9824	150	Inforce (10)
<input type="checkbox"/> 000200878549					06/08/2009	06/08/2009	06/04/2019	COLM 10	548043	3000	Inforce (10)

4

5

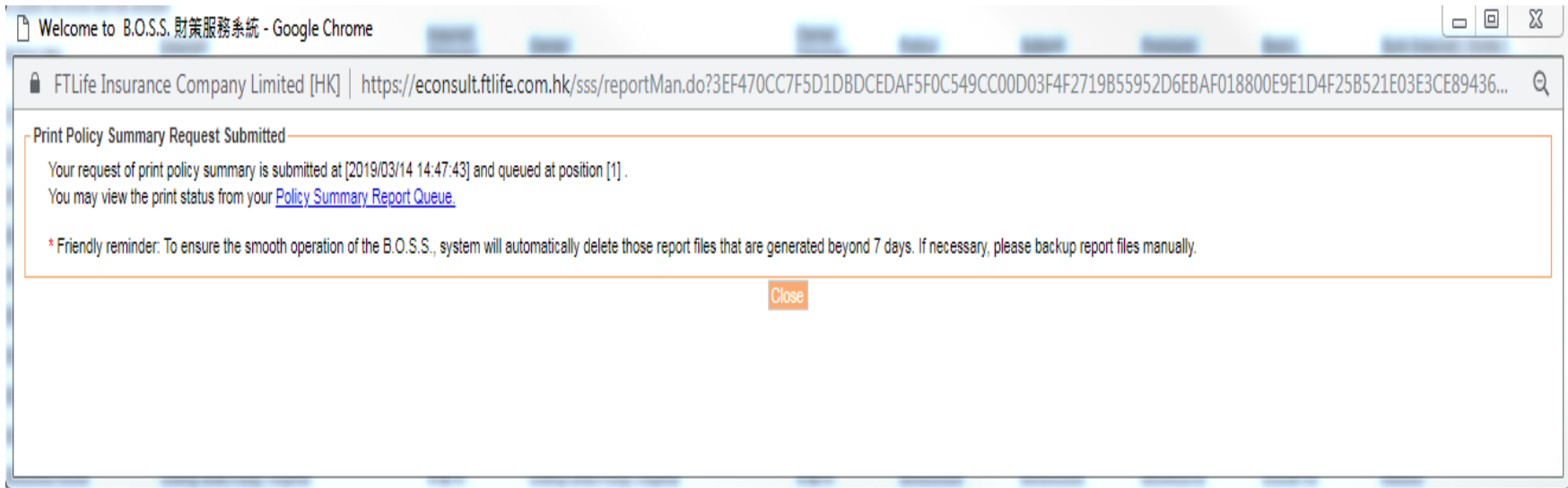
Select / Unselect All [Print Policy Summary](#)

1 37

1. There are some selection criteria for user to select type of policies to be included in the summary report
2. Please select the summary report language
3. Then click "search" to list out all the policies under the IFA company
4. Select those policies in relation to user's request for policy summary
5. Click "Print Policy Summary"

Company User

Download of Policy Summary Report



1. Once the request is submitted, a message box will pop up to remind user that the request is on the way. A hyperlink is shown in the message box and user may simply click on the link to redirect to the “Policy Summary Report Queue” for status checking

Production Inquiry

- ✓ Download of Policy Summary Report
- ✓ Policy Summary Report Queue

Company User

Policy Summary Report Queue



[Home](#) [Switch User](#) [Restore User](#) [Contact Us](#) [Change Password](#) [Logout](#)

- Welcome
- Sales Services
- Sales Tools
- Community Service
- Content Management
- Production Inquiry
- Policy Inquiry
- Fund Price Inquiry
- Exchange Rate Inquiry
- Download of Policy Summary Report
- Policy Summary Report Queue
- IFA Investment eService Application Log

Policy Summary Report Queue 14/03/2019 14:50

Print Status

1	2	3	4					
Request	Queue	Report Name	User Name	Switch to	Submit Time	Start Time	Complete Time	Status
24442	0	Download of Policy Summary Report	Ray Chan		14/03/2019 14:47:43	14/03/2019 14:48:16	14/03/2019 14:48:17	Completed (85KB)

* Friendly reminder: To ensure the smooth operation of the B.O.S.S., system will automatically delete those report files that are generated beyond 7 days. If necessary, please backup report files manually. 1/1

[Refresh](#) 5

1. There is request no. for user's reference
2. "Queue" may give user information of ordering sequence
3. Respective time logs are available to let user know the submission history
4. There are few status types to let user know the status regarding the generation of summary reports, e.g. "Queuing", "In Progress" and "Completed". Once the status turn to "Complete" with a hyperlink shown, user may simply click on it to download the summary reports
5. User can click on "Refresh" to update the status regarding the downloading of summary reports*

*Please note that the maximum number of reports in a single request is 30.

Appendix I –IFA Portal Password Policy (Final)

Appendix II –Terms & Conditions

Appendix III –Important Notes (Investment Choice Switching)

Appendix IV –Important Notes (Future Investment Choice Reallocation)

Appendix V –FAQ

Thank You!