

# LUAHK MEMBERSHIP APPLICATION FORM 「保協」會員申請表

Please fill in **BLOCK** Letters 請以英文**正楷**填寫

## Types of Membership 會員申請類別

- Associate Member 附屬會員       Provisional Member 暫準會員  
 Senior Member 資深會員

## Personal Particulars 個人資料

- Mr 先生       Mrs 太太       Ms 女士       Miss 小姐

Family Name 姓 \_\_\_\_\_

Given Name 名 \_\_\_\_\_

Alias (if any) 別名 (如有) \_\_\_\_\_

Name in Chinese 中文姓名 \_\_\_\_\_

Date of Birth 出生日期 \_\_\_\_\_ D 日 \_\_\_\_\_ M 月 \_\_\_\_\_ Y 年

HKID No. 身份證號碼 \_\_\_\_\_

Nationality 國籍 \_\_\_\_\_

Home Address 住宅地址 \_\_\_\_\_

Mobile 手提電話 \_\_\_\_\_

Email Address 電郵 \_\_\_\_\_

## Company 所屬公司

Company Name 公司名稱 \_\_\_\_\_

Company Address 公司地址 \_\_\_\_\_

Agent Code 中介人編號 \_\_\_\_\_

Office Tel. 公司電話 \_\_\_\_\_

Fax 傳真號碼 \_\_\_\_\_

Position 職位 \_\_\_\_\_

Registration No. 註冊編號 \_\_\_\_\_

## Highest Education 教育程度

- Secondary 中學       University/Post-Secondary 大學 / 大專或以上  
 Post-Graduate or above 碩士或以上       Others 其他  
 Professional Qualifications 專業資格 \_\_\_\_\_ (Please Specify 請註明)

## Referee Details 介紹人資料

Name 姓名 \_\_\_\_\_

Tel No. 電話號碼 \_\_\_\_\_ Membership No. 會員號碼 \_\_\_\_\_

## Job Nature 現職

- Agent 保險代理       Corporate Staff 公司僱員  
 Broker 保險經紀       Others 其他

Date of entry into the life insurance business

加入壽險行業日期 \_\_\_\_\_ D 日 \_\_\_\_\_ M 月 \_\_\_\_\_ Y 年

## Payment by 繳付方式

Cheque # \_\_\_\_\_ Bank \_\_\_\_\_

Payable to "LUAHK"

Credit Card (只接受 Visa / Master)

Card Number 信用卡號碼 \_\_\_\_\_

Cardholder Name 信用卡持有人姓名 \_\_\_\_\_

Expiry Date 有效期 \_\_\_\_\_ Amount 金額 **HK\$590**

Signature of Cardholder 信用卡持有人簽署 \_\_\_\_\_



Photo Here  
照片



2020年度  
會員申請表

I declare that I am primarily engaged in the business of life insurance and that I wish to become an Associate/ Provisional/ Senior member of The Life Underwriters Association of Hong Kong Ltd. and that if elected, I agree to subscribe to the following Membership Pledge.

本人聲明本人主要從事人壽保險業務，並希望成為香港人壽保險從業員協會的附屬 / 暫準 / 資深會員，如獲執委通過的話，本人同意遵守以下之會員承諾。

## Proposer and Seconder 建議人及附議人

(Must be LUAHK Life Member, Senior or Full Member) 必須為本會之永久會員、資深會員或全資格會員  
We, the undersigned, are acquainted with the applicant (1) believe him/her to be a Person of good moral, ethical and professional standing and in every respect eligible to become a member of the association, and (2) we declare that we have met the applicant and have as far as possible satisfied ourselves that the above details are correct.

### Proposer 建議人

Name 姓名 \_\_\_\_\_ Signature 簽名 \_\_\_\_\_

Membership No. 會員號碼 \_\_\_\_\_

Tel 電話 \_\_\_\_\_ Co 公司 \_\_\_\_\_

### Seconder 附議人

Name 姓名 \_\_\_\_\_ Signature 簽名 \_\_\_\_\_

Membership No. 會員號碼 \_\_\_\_\_

Tel 電話 \_\_\_\_\_ Co 公司 \_\_\_\_\_

Above two columns are compulsory items. 以上建議人及附議人兩項必須填寫。

## Membership Pledge 會員承諾

As a member of The Life Underwriters Association of Hong Kong Ltd., I pledge that I will always PLACE the interests of policyowners and prospective purchasers before those of any insurer of myself; MAINTAIN the highest standards of professional competence in order to advise policyowners and prospective purchasers to the best of my ability; RESPECT the confidence of policyowners and prospective purchasers and carefully guard any information which becomes known to me regarding their personal and business affairs; UPHOLD the best interest of the institution of life insurance; and COMPLY with the Memorandum and Articles of Association, By-laws, and Code of Ethics of The Life Underwriters Association of Hong Kong Ltd.

作為香港人壽保險從業員協會會員，本人承諾必須 - 客戶的利益放在首位；客戶資料必須保密；推介合適的保險服務及產品；清楚解釋投保計劃書；不可錯誤解說；不可譏謗；不可回佣；不可游說客戶轉換個人人壽保險單；慎重處理新團體保險單及退休金計劃；不可私取費用，並嚴格遵守協會之章程和專業守則。

## Credit Card Direct Debit Authorization 授權以信用卡直接付款

Credit Card Direct Debit Authorization: I accept and agree to transfer membership fee of The Life Underwriters Association of Hong Kong Ltd. which will be debited from above Credit Card Account and understand the membership fee will be subjected to change in accordance with the provision of the LUAHK policy. I confirm that my signature on this application form is the same as that for the operation of my Credit Card Account to be debited for the transfer. Credit Card Direct Debit shall be made after 17 December each calendar year automatically. Termination of the Authorization service shall be made in written before 17 December of the calendar year. Cancellation shall ONLY be effective if confirmation is made by LUAHK. No refund of membership fee will be possible if payment is settled.

授權以信用卡直接付款：本人同意及授權自本人上述之信用卡戶口於每年12月17日後自動轉賬繳付香港人壽保險從業員協會有限公司之會費，並明白會費將會根據協會之條例而變更。本人證明在此表格上之簽名式樣與本人之信用卡戶口式樣一致。如欲取消直接付款繳付會費之會員，請於每年12月17日前以書面通知本會，並獲本會確認後才正式生效。會員如未能於12月17日前通知本會，所繳付之會費將不獲退還。

You can enjoy a Free Gift with the first time application of Credit Card Direct Debit Authorization. Gift is available while stock lasts.

凡於本年度首次授權以信用卡每年直接繳付續會費之會員，將獲贈禮品一份。(數量有限，送完即止!)

- Your company address will be your correspondence address.

閣下的公司地址為通訊地址。

- The membership is to be renewed annually on first of January.

請在每年一月一日繳付新一年度之會費。

- Annual Membership is valid until December 31 every year.

每年會籍及會費有效期至該年度之十二月三十一日。

I understand that the information provided will become my record and may be used for all purposes relating to membership application, record keeping and all activities related to LUAHK. I also understand the membership application will be considered and approved through LUAHK Executive Committee. Besides, I agree and accept that all photos and videos taken during my participation in LUAHK events would be used for publications. I understand and accept that the paid membership fee is non-refundable and non-transferable.

本人聲明申請表中所提供的一切資料均正確無誤。本人明白及同意「保協」將所提供的資料作為會籍申請、會員記錄和「保協」活動推廣等用途。本人亦明白會員申請需經過保協執行委員會審核。同時，本人同意「保協」於課程及活動過程中所拍攝之相片、錄影及錄音等，可刊載於本會網頁、宣傳單張及印刷品內。本人已明確並接受所繳交之款項恕不退還及不能轉讓。

Address: Unit A-D, 23/F., Seabright Plaza, 9 - 23 Shell Street, North Point, Hong Kong

地址：香港北角蜆殼街 9-23 號秀明中心 23 樓 A-D 室

Tel 電話：(852) 2570 2256 Fax 傳真：(852) 2570 1525

Email 電郵：info@luahk.org Website 網址：www.luahk.org

## Your Signature 申請人簽署

Signature 簽名 \_\_\_\_\_ Date 日期 \_\_\_\_\_

## For Association Use Only 只限本會填寫

Control No. \_\_\_\_\_ Date \_\_\_\_\_

Auth Code No. \_\_\_\_\_ Membership No. \_\_\_\_\_

## 為何要加入 LUAHK? Why Join LUAHK?

- 國際化聯繫
- 最多會員、最具代表性
- 作為與政府有關部門的諮詢橋樑
- 會員福利豐厚
- 協助會員不斷學習、自我增值
- 百萬圓桌會資格認可之本地保險業組織
- 協助會員持續進修爭取學分
- 提供最新保險市場資訊
- 增加與業界精英交流機會
- 頒發保險界最具代表性獎項
- 提高會員專業形象有助會員推銷
- 協會專業操守準則、提高客戶信心
- 協會會員 = 優質保證

We have linkage with International Life Insurance Organizations

We are the largest association in terms of the number of members, representing the life insurance practitioners of Hong Kong

We communicate on behalf of our members with the related government bodies

We provide lots of value-added services/benefits to our members

We create context such as training courses/seminars/convention for members to learn, grow and excel

MDRT recognized local insurance organization

We offer training and educational programmes for members to comply with the upcoming mandatory continuing professional development's requirement

We provide the most current market trend and information of our trade

Members have chances to meet elites of the industries through our functions

We have prestigious prize presentations

We uphold the professional image of our members that makes their clients to entrust them in taking care of their insurance services

We demand our members for their compliance with LUA Code of Ethics, which increases their clients' confidence

LUA members = Quality

## 會員類別 Type of membership

### • 榮譽會員 (豁免年費、享有會員權利)

對保協有特殊貢獻，並受本會執委會邀請之人士。

### • Honorary Member (Enjoy perpetual annual fee waiver and member privileges)

To anyone who has distinguished contributions to LUAHK and nominated by LUAHK Executive Committees.

### • 永久會員 (豁免年費、享有會員權利、擁有投票權)

入會累計有15年，(成為「全資格會員」最少13年)，並得到本會執委會通過。凡加入成為永久會員，須先繳交一次性入會費(相當於十年會費)。

### • Life Member (Enjoy perpetual annual fee waiver, member privileges, and have voting right)

To anyone who has joined LUAHK for accumulated 15 years (No less than 13 years as being a full member) and get approval from LUAHK board. To complete the application of life member, one time membership fee (equal to ten years membership fee) shall be settled.

### • 資深會員 (享有會員權利、擁有投票權)

A. 入會累計有10年全資格會員資歷，得到本會執委會通過，可免費提升成為資深會員。

B. 從事銷售人壽保險連續10年或以上之保險中介人、保險公司代表或保險經紀，而非本會會員，須繳交一次性入會費(相當於十年會費)，並得到本會執委會通過。

### • Senior Member (Enjoy member privileges and have voting right)

A. To anyone who has joined LUAHK for accumulated 10 years as full member and be approved by LUAHK board, can upgrade to senior member without any charges.

B. To anyone who is engaged in a career in the insurance industry (including life insurance agent, representative of insurance company, broker) for accumulated 10 years or above. For non LUAHK member, one time membership fee (equal to ten years membership fee) is required and approved by LUAHK board.

### • 全資格會員 (享有會員權利、擁有投票權)

從事銷售人壽保險之保險中介人、保險公司代表或保險經紀，擁有2年暫準會員資歷。

### • Full Member (Enjoy member privileges and have voting right)

To anyone who has joined LUAHK for 2 years as provisional member and engaged in a career in the insurance industry (including life insurance agent, representative of insurance company, broker)

### • 暫準會員 (享有會員權利、擁有投票權)

從事銷售人壽保險之保險中介人、保險公司代表或保險經紀，並得到本會執委會通過。

### • Provisional member (Enjoy member privileges and have voting right)

Open to anyone who is engaged in a career in the insurance industry (including life insurance agent, representative of insurance company, broker) and be approved by LUAHK board.

### • 附屬會員 (享有會員權利)

從事及受僱於保險公司、保險經紀行、保險代理公司(非直接銷售工作之僱員或代理人及受僱於香港境外人壽保險公司之保險中介人)、保險公司代表或保險經紀，並得到本會執委會通過。

### • Associate Member (Enjoy member privileges)

Open to anyone who is employed by the insurance company, insurance agency, brokerage firm (not employed as a sales or agent in local and oversea insurance companies) and be approved by LUAHK board.

## 優質銷售指引及十大專業守則 Best Practice Guidelines and Code of Ethics

1. 了解你的客戶並推介合適產品
2. 於冷靜期內送遞保單
3. 清楚講解保單內容
4. 詳細解釋產品的潛在回報及風險
5. 謹慎處理轉保事宜並清楚說明有關利弊
6. 協助跟進理賠服務
7. 妥善處理客戶資料以保障客戶私隱權利
8. 適當處理客戶的保費
9. 與客戶保持聯繫並給予最新資訊
10. 清楚及遵守相關行業法規

1. Know your client and recommend suitable products
2. Deliver the policy within the cooling off period
3. Provide clear explanation on policy's details
4. Elaborate the potential returns and risks of the product
5. Handle policy replacement prudently and declare the relevant benefit and loss clearly
6. Support claims follow ups
7. Handle client's information properly to protect personal privacy
8. Handle clients' premium properly
9. Maintain close tie and provide updated information to clients
10. Understand and comply with applicable industry guidelines and regulations

### • 客戶的利益應放在首位

### • 客戶資料必須保密

### • 推介合適的保險服務及產品

### • 清楚解釋投保計劃書

### • 不可錯誤解說

### • 不可譏謔

### • 不可回佣

### • 不可游說客戶轉換個人人壽保險單

### • 慎重處理新團體保險保單及退休金計劃

### • 不可私取費用

### • Priority of Client's Interests

### • Confidential Information

### • Suitability of Insurance

### • Explanation of the Policy

### • Misrepresentation

### • Defamation

### • Rebating

### • Replacement

### • Transfer of Group Insurance or Retirement Benefit Business

### • Fees and Premium