

# Banking Plan and Banking Services Maintenance / Termination Form

## 理財計劃及銀行服務更改 / 終止通知書

To: Standard Chartered Bank (Hong Kong) Limited  
致: 渣打銀行(香港)有限公司

Please "✓" the appropriate box. 請於適合方格填上 "✓"。

Date 日期

### (A) Customer Information 客戶資料 (Please write in BLOCK letters 請用正楷填寫)

Customer Name (English) 客戶姓名 (英文)

Customer ID Type 客戶身份證明文件種類

HKID 香港身份證  Passport 護照

Others 其他

Contact Phone Number 聯絡電話號碼

Customer ID Number 客戶身份證明號碼

 ( )

I/We hereby authorize and request the Bank to effect the following instruction(s). 本人 / 吾等茲現授權並要求貴行辦理下列事項。

### (B) Banking Plan 理財計劃

Note: 1. Options for banking services will be altered according to the change of Banking Plan.

注意 轉換現有理財計劃，將會更新綜合理財服務之選擇。

2. For conversion of Banking Plan, please complete instruction for "ATM Card Services Maintenance / Termination" in section E3 (if applicable).

轉換現有理財計劃，請於E3部份填妥「更改/終止提款卡服務」一欄（如適用）。

3. For non-Priority Banking customers, Bank by Phone/Fax (I6) and Hold Mail services will no longer be provided.

非優先理財客戶，將不能繼續享用電話/傳真理財及郵件保存服務。

4. Please complete and submit separate service request form in person for any change of Pre-arranged Services (ODD/OTT), Bank by Phone/Fax (I6) or Hold Mail Services.

更新預先安排服務（匯票/電匯）、電話/傳真理財或郵件保存服務，必須另外填妥及親身遞交有關服務之申請/更改表格。

5. For termination of existing Banking Plan, the existing banking services must be cancelled except existing "Standard Chartered ATM Card" and "Tele-electronic Banking Services". For Non-Relationship Banking customers, annual fee for "Standard Chartered ATM Card" and "Tele-electronic Banking Services" will be charged to the customer's account. Please refer to "Service Charges - An easy guide to banking fees" for latest fees and charges.

凡終止現有理財計劃，現有的銀行服務將會被取消。現有「渣打提款卡」及「電子理財服務」除外。如非理財計劃之客戶，「渣打提款卡」及「電子理財服務」之年費將由客戶之戶口扣除。客戶請參閱「服務收費－銀行服務收費一覽表」以了解有關服務之最新收費。

#### Existing Banking Plan 現有理財計劃

Priority Banking 優先理財  Preferred Banking 優待理財  Easy Banking 快易理財

Please specify change of Banking Plan and Banking Services below:  
請列出現有之理財計劃及銀行服務之更改

#### Banking Plan Conversion 轉換現有理財計劃

New Banking Plan 新理財計劃 ATM Card Service 提款卡服務

Priority Banking 優先理財  Priority Banking Card 優先理財卡  
 Preferred Banking  Preferred Banking Card Preferred Banking 卡  
 Easy Banking 快易理財  Standard Chartered ATM Card 渣打提款卡

Charge Account for Maintenance Fee   
扣取服務費之戶口

#### Banking Plan Closure 終止現有理財計劃

#### Change of Banking Services 更新銀行服務

Services to be held 可供選擇服務	New 新增	Cancel 取消
Tele-electronic Banking (PB/EX/EA) 電子理財	<input type="checkbox"/>	<input type="checkbox"/>
Reminder Message (PB/EX) 訊息提示	<input type="checkbox"/>	<input type="checkbox"/>
Floating Overdraft Facility (PB/EX) 浮動透支	<input type="checkbox"/>	<input type="checkbox"/>
Pre-arranged Services (ODD/OTT)* (PB/EX) 預先安排服務（匯票/電匯）	<input type="checkbox"/>	<input type="checkbox"/>
Bank by Phone / Fax (I6) * 電話/傳真理財*	<input type="checkbox"/>	<input type="checkbox"/>
Hold Mail * 郵件保存* (PB)	<input type="checkbox"/>	<input type="checkbox"/>

\* Please refer to Notes 3 & 4 under Section B.  
請參閱B部份注意事項3和4。

#### For Bank Use Only 銀行專用 (Closure Reason)

00 Maintenance fee  01 Other fees / Charges  02 Banking facilities  03 Rates / Pricing  
 04 Product range / Features  05 Service quality  06 Branch / ATM Network  07 Moving / Migration

### (C) Reminder Message Services (Priority Banking / Preferred Banking / InvestPro Customer Only)

訊息提示服務（只適用於「優先理財」、「Preferred Banking」、「專智投資服務」之客戶）

Note: 1. Any notice of registration, cancellation or amendment for Reminder Message Services should be given to the Bank at least seven working days prior to the date of such instruction is to be taken effect.

申請、取消或更改任何訊息提示服務，須於服務指示生效日最少七個工作天之前通知本行。

2. The registered user of mobile phone for receiving the messages must be the same customer who has signed up the Reminder Message Services.

流動電話註冊用戶必須與申請訊息提示服務的客戶相同。

3. Reminder Message Services is applicable to mobile phones connected to GSM / PCS network only.

訊息提示服務只適用於接駁GSM / PCS網絡之流動電話。

**Message Maintenance** 新增/取消訊息 Mobile Phone No.:  Network:  GSM  PCS  
 流動電話號碼 網絡  
 (Please send/cancel Reminder Message Services to this phone no. 請轉送/取消訊息提示服務至此電話號碼)

- Registration 新增訊息  Cancellation 取消訊息
1. Time Deposit / Premium Deposit Maturity Alert Service 定期存款/高息貨幣掛鈎存款到期提示
2. Cheque Protection / Insufficient Fund 支票透支保障/存款不足
3. Personal Portfolio Update - Currency 個人投資組合資訊 - 貨幣

**Change Mobile Phone No.** 更改流動電話號碼 New Mobile Phone No.:  Network:  GSM  PCS  
 新流動電話號碼 網絡  
 (Please send Reminder Message Services to this phone no. 請轉送訊息提示服務至此電話號碼)

**(D) Floating Overdraft Facility (Priority Banking / Preferred Banking Customer Only, excluding staff of Standard Chartered Bank (Hong Kong) Limited) 浮動透支服務 (只適用於「優先理財」/「Preferred Banking」之客戶, 渣打銀行(香港)有限公司職員除外)**

- Amend Floating Overdraft Facility to  -  -  -  New Current Account No.   
 更改浮動透支服務至 新支票往來賬戶號碼
- Cancel Floating Overdraft Facility  
 取消浮動透支服務

**(E) Card Services 卡服務**

**E1. Change of Customer Daily ATM and EPS Transaction Limit 更改個人每日自動櫃員機及「易辦事」交易限額**

Transaction Type 交易類別	Customer Type 客戶類別	Bank Default Daily Limit (HKD) 銀行預設每日限額(港幣)	Requested Daily Limit (HKD), adjustable in multiples of HKD1,000 要求之每日限額(港幣), 可以港幣1,000元為單位調整
ATM Cash Withdrawal / Account Transfer * / Jet Payment	Priority Banking / Preferred Banking Customers 優先理財/Preferred Banking 客戶	30,000	<input type="text"/> ,000 (Maximum 最高: 40,000)
自動櫃員機提款/ 轉賬* / 「繳費易」	Easy Banking / Non-Banking Plan Customers 快易理財/非理財計劃客戶	20,000	<input type="text"/> ,000 (Maximum 最高: 30,000)
EPS # 「易辦事」 #	All Customers 所有客戶	50,000	<input type="text"/> ,000 (Maximum 最高: 50,000)

\* Any transfer between accounts linked to the same debit card will not be subject to the designated Daily Transaction Limit.  
 於同一張提款卡內的戶口之間的轉賬不受每日交易限額之限制。

# In the event that the debit card is used to perform any of PPS transactions and tax and eIPO payments via ATM, this limit will be automatically increased up to HKD100,000.  
 倘提款卡被用作任何「繳費靈」交易或透過自動櫃員機繳交稅款或電子公開招股費用, 則該限額將會自動提高至港幣100,000元。

**E2. Activation / Change of Overseas ATM Withdrawal Function 啟動 / 更改自動櫃員機海外提款功能**

Note: 1. To activate / amend Overseas ATM Withdrawal Function, information with shading must be completed.  
 注意 申請啟動 / 更改自動櫃員機提款功能, 陰影部分必須填寫。

2. Your request will normally be processed within 1 working day upon our receipt of your form.  
 本行將在收到您的申請表後一個工作天內處理您的申請。
3. a. Not applicable to Moneylink ATM Card with local network only.  
 不適用於只有本地提款功能的萬里靈卡。
- b. Not applicable to Standard Chartered American Express® Credit Card, Standard Chartered Corporate VISA Credit Card, Standard Chartered Corporate Executive Credit Card, Standard Chartered UnionPay Dual Currency Platinum Credit Card, MANHATTAN Revolving Personal Loan Card and Standard Chartered Revolving Cash Card.  
 不適用於渣打American Express®信用卡、渣打VISA公司信用卡、Standard Chartered Corporate Executive Credit Card, 渣打銀聯雙幣白金信用卡、MANHATTAN「循環錢」貸款卡及渣打「循環貸款卡」。
- c. Not applicable to MANHATTAN supplementary credit cardholder with same card number as the principal credit cardholder.  
 不適用於與信用卡主卡客戶擁有共同卡號碼的MANHATTAN信用卡附屬卡客戶。
- d. If your requested Activation End Date exceeds the card expiry date (if any), your requested End Date will be automatically set as the card expiry date.  
 倘若您所填寫的屆滿日期超過該卡的有效日期(如適用), 該指示的屆滿日期將會被自行設定為該卡之有效日期。
- e. The withdrawal limit is bound by the Bank designated Daily ATM Transaction Limit. If your requested Overseas Daily Withdrawal limit exceeds the designated Daily ATM Transaction Limit, your requested limit will be automatically set as the designated Daily ATM Transaction Limit. Please note that the ATM Transaction Limit is also subject to other limits determined by the Bank from time to time.  
 此限額受制於本行預設的「每日自動櫃員機交易限額」。倘若您填寫的「海外提款之每日限額」超過本行預設的交易限額, 您所申請的「海外提款之每日限額」將會被自行設定為本行預設的「每日自動櫃員機交易限額」。請注意, 此自動櫃員機交易限額亦不可超過由本行不時釐定之其他限額。

**E2.1 ATM Card 提款卡**

Standard Chartered ATM Card <sup>a</sup> / Preferred Banking Card / Priority Banking Card No. 渣打提款卡 <sup>a</sup> / Preferred Banking 卡 / 優先理財卡號碼	Activation Start Date 指示啟動日期	Activation End Date <sup>d</sup> 指示屆滿日期 <sup>d</sup>	Overseas Daily Withdrawal Limit <sup>e</sup> (HKD) 海外提款之每日限額 <sup>e</sup> (港元)	Deactivate the Overseas ATM Withdrawal Function 取消已設定的 海外提款功能
<input type="text"/>	<input type="text"/> D D M M Y Y 日 日 月 月 年 年	<input type="text"/> D D M M Y Y 日 日 月 月 年 年	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/> D D M M Y Y 日 日 月 月 年 年	<input type="text"/> D D M M Y Y 日 日 月 月 年 年	<input type="text"/>	<input type="checkbox"/>

E2.2 Credit Card 信用卡

Credit Card No. <sup>b</sup> 信用卡號碼 <sup>b</sup>	Activation Start Date 指示啟動日期	Activation End Date <sup>d</sup> 指示屆滿日期 <sup>d</sup>	Overseas Daily Withdrawal Limit <sup>e</sup> (HKD) 海外提款之每日限額 <sup>e</sup> (港元)	Deactivate the Overseas ATM Withdrawal Function 取消已設定的海外提款功能
<b>Principal Card 主卡</b>				<input type="checkbox"/>
	D D M M Y Y 日 日 月 月 年 年	D D M M Y Y 日 日 月 月 年 年		<input type="checkbox"/>
<b>Supplementary Card<sup>c</sup> 附屬卡<sup>c</sup></b>				<input type="checkbox"/>
	D D M M Y Y 日 日 月 月 年 年	D D M M Y Y 日 日 月 月 年 年		<input type="checkbox"/>
Cardholder Name 持卡人姓名: _____				<input type="checkbox"/>
	D D M M Y Y 日 日 月 月 年 年	D D M M Y Y 日 日 月 月 年 年		<input type="checkbox"/>
Cardholder Name 持卡人姓名: _____				<input type="checkbox"/>

E3. ATM Card Services Maintenance / Termination 更改 / 終止提款卡服務

Note: 1. Only existing Standard Chartered ATM Card can be maintained after cancellation or conversion of Banking Plan. For Non Banking Plan 注意 Customers, an Annual Fee per ATM card will be charged to the customer's account, Please refer to "Service Charges - An easy guide to banking fees" for latest fees and charges.  
如取消或轉換理財計劃，只可保留現有之渣打提款卡。非理財計劃客戶之渣打提款卡年費將由客戶之戶口扣除。請參閱「服務收費－銀行服務收費一覽表」以了解有關服務之最新收費。

2. Replacement card may be issued at the Bank's own discretion and the appropriate handling fee will be charged at an amount which the Bank determines from time to time. The aforementioned handling fee will be debited from customer's account accordingly.  
本行有權自行決定是否簽發新卡並按照由本行不時釐定之收費，收取相應補發新卡之款項。有關之收費將由客戶之戶口扣除。

<b>ATM Services 提款卡服務</b> <input type="checkbox"/> Package Conversion 轉換理財策略 <input type="checkbox"/> Cancel existing card 取消現有之提款卡 <input type="checkbox"/> Issue / Replace 新發 / 補發 <input type="checkbox"/> Account change 賬戶更改 <input type="checkbox"/> Combine 綜合 <input type="checkbox"/> Cancel 取消	<b>Report loss / Stolen 報失</b> <input type="checkbox"/> Yes 是 <input type="checkbox"/> No 否	<b>Existing Standard Chartered ATM Card / Preferred Banking Card / Priority Banking Card No.</b> <b>現有之渣打提款卡 / Preferred Banking卡 / 優先理財卡號碼</b> _____ _____ _____	<b>Old card returned 舊卡已退回</b> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>New ATM Card Type 新提款卡種類</b> <input type="checkbox"/> Single Currency ATM Card 單幣提款卡 / <input type="checkbox"/> Dual Currency ATM Card 雙幣提款卡# # For Dual currency ATM Card, at least one of the accounts to be included should be an RMB account or an IDA <sup>^</sup> with RMB sub-account. 申請雙幣提款卡，必須設定最少一個人民幣戶口或附有人民幣附屬戶口之綜合存款戶口。 <input type="checkbox"/> Priority Banking Card 優先理財卡 <input type="checkbox"/> Preferred Banking Card Preferred Banking 卡 <input type="checkbox"/> Standard Chartered ATM Card 渣打提款卡 <input type="checkbox"/> Click-a-Count ATM Card* Click-a-Count 提款卡* * Applicable to replacement of Click-a-Count ATM Card only. Dual Currency ATM Card is not available. 只適用於補發Click-a-Count提款卡。不適用於申請雙幣提款卡。	<b>Language on Screen 螢幕顯示之語言</b> <input type="checkbox"/> English 英文 <input type="checkbox"/> Chinese 中文	<b>Accounts to be included in new ATM Card 更改提款卡附有之賬戶</b> <b>Primary Account 基本戶口</b> Account Type: <input type="checkbox"/> HKD, OR <input type="checkbox"/> IDA <sup>^</sup> 戶口種類： 港幣，或 綜合存款戶口 Account Number: _____ 戶口號碼： _____ <b>Other Account(s) 其他戶口</b> Account Type: <input type="checkbox"/> HKD, OR <input type="checkbox"/> RMB, OR <input type="checkbox"/> IDA <sup>^</sup> 戶口種類： 港幣，或 人民幣，或 綜合存款戶口 Account Number: _____ 戶口號碼： _____ Account Type: <input type="checkbox"/> HKD, OR <input type="checkbox"/> RMB, OR <input type="checkbox"/> IDA <sup>^</sup> 戶口種類： 港幣，或 人民幣，或 綜合存款戶口 Account Number: _____ 戶口號碼： _____ <sup>^</sup> Integrated Deposits Account 綜合存款戶口	
<b>Simplified ATM Service 簡易自動櫃員機服務</b> <input type="checkbox"/> Priority Banking Card 優先理財卡 <input type="checkbox"/> Preferred Banking Card Preferred Banking卡 <input type="checkbox"/> Standard Chartered ATM Card 渣打提款卡 <b>* This service is available in Chinese Only 只設中文螢幕顯示 (Lang Code = F)</b>		<b>Account to be included in new ATM Card 更改提款卡附有之賬戶</b> Account No. _____ 戶口號碼 _____ <b>* Only one account can be included in the card 每張卡只可附有一個賬戶</b>	

The Hong Kong Jockey Club Cash Voucher Purchase Facility  
購買香港賽馬會現金券服務

Required\* 需要\*

\* The facility will not be offered if not specified  
如非列明，閣下將被視為不需要上述服務

**(F) Tele-electronic Banking Services (Phone Banking Services and Internet Banking Services "Standard Chartered Online")**  
**電子理財服務 (電話銀行服務及網上銀行服務「渣打網上理財」)**

- Note: 1. Customer who applies for Tele-electronic Banking Services can use the same Phone Banking Card No. and Tele-electronic Identification Number (TIN) to access Phone Banking Services and register Standard Chartered Online Banking.  
 客戶開立「電子理財服務」即可使用相同之電話理財卡號碼及「電子理財私人密碼」登入電話銀行服務及登記「渣打網上理財」。
2. TIN creation / transfer is only applicable for Standard Chartered ATM Card / Preferred Banking Card / Priority Banking Card and Credit Card.  
 「電子理財私人密碼」申領 / 轉移只適用於渣打提款卡 / Preferred Banking卡 / 優先理財卡及信用卡。
3. Customer will be held liable for all losses / cost due to the loss of Tele-electronic Identification Number (TIN) or Standard Chartered Online Banking Password.  
 一切因遺失「電子理財私人密碼」或「渣打網上理財」密碼所引致之損失或費用由客戶負責。
4. The customer's mobile phone number in the Bank's records will be used to obtain a One-time Password (OTP) for security verification when the customer register Standard Chartered Online Banking and perform certain online banking services.  
 客戶於本行紀錄之流動電話號碼將會用於登記「渣打網上理財」服務及使用某些指定網上銀行服務時接收一次有效密碼(OTP)，以供保安核證之用。

Create Tele-electronic Identification Number (TIN)  
 申領「電子理財私人密碼」

Existing Standard Chartered ATM Card / Preferred Banking Card / Priority Banking Card  
 現有之渣打提款卡/Preferred Banking卡/優先理財卡

Transfer Tele-electronic Identification Number (TIN) record  
 轉移現有之「電子理財私人密碼」記錄

Existing Standard Chartered Credit Card 現有之渣打信用卡

Re-issue TIN 補領「電子理財私人密碼」

New ATM Card in Section E 於E部份中新簽發之提款卡

New Phone Banking Card No.: 新電話理財卡號碼:

Report lost / forgotten of Tele-electronic Identification Number (TIN) and request for TIN re-issue  
 遺失「電子理財私人密碼」及補領「電子理財私人密碼」

Unlock Standard Chartered Online Banking registration (locked after incorrect inputs of Tele-electronic Identification Number (TIN), ATM Personal Identification Number (PIN) or cardholder information during registration of Online Banking, Credit Card eStatement or setup of Transaction Password)  
 解除已被鎖上的「渣打網上理財」登記(於登記網上理財、信用卡電子月結單或設定交易密碼時重覆輸入錯誤的「電子理財私人密碼」、「自動櫃員機私人密碼」或信用卡卡主資料而被鎖上)

Cancel Phone Banking Services  
 取消電話銀行服務

Cancel Standard Chartered Online Banking Services  
 取消「渣打網上理財」服務

Suspend Standard Chartered Online Banking Service  
 暫停「渣打網上理財」服務

Reactivate Standard Chartered Online Banking Services (only applicable to reactivation of service after suspension)  
 恢復「渣打網上理財」服務(適用於暫停服務後重用本服務)

**(G) Terms and Conditions 條款及細則**

1. I/We acknowledge that: (i) the Customer Terms are applicable to the accounts/services referred to in this form; (ii) the Customer Terms and the applicable documents referred to in Part A of the Customer Terms ("banking agreement") have been made available to me/us, and (iii) I/we have read and understood the banking agreement and I/we agree to be bound by them.  
 本人/吾等承認：(i)客戶條款適用於本申請表內提及的戶口/服務；(ii)貴行已向本人/吾等提供客戶條款及當中A部所述的相關文件(「銀行協議」)，及(iii)本人/吾等已細閱和理解銀行協議，並且同意受其約束。
2. I/We acknowledge receipt of and have read and agreed with the Notice to Customers and Other Individuals relating to the Personal Data (Privacy) Ordinance and the Code of Practice on Consumer Credit Data ("Notice").  
 I/We further agree that all information provided by me/us in this application form and such personal data relating to an individual collected by the Bank from time to time may be used and disclosed for such purposes and to such persons (whether the recipient is located in Hong Kong or another country, or in a country that does not offer the same level of data protection as Hong Kong) in accordance with the Bank's policies on use and disclosure of personal data as set out in the Notice, which may be subject to changes from time to time.  
 本人/吾等確認收悉並已閱讀「關於《個人資料(私隱)條例》及《個人信貸資料實務守則》致客戶及其他個別人士的通知」(「通知」)並同意通知的內容。  
 本人/吾等進一步同意所有本人/吾等於本申請表內提供的資料以及貴行不時收集的有關個別人士的個人資料，均可根據貴行列於通知內有關個人資料使用及披露的政策，就有關用途及向有關人士(不論有關接收人士是處於香港或其他地方，或不論當地的個人資料保護程度是與香港相乎)使用及披露。

Customer Signature 客戶簽署

Joint Account Holder's Signature 聯名戶口持有人簽署  
 (Applicable for "both-to-sign" joint accounts 只適用於共同簽署的聯名戶口)

For Bank Use Only 銀行專用							
Branch Banking / Direct Banking				Bank Operation / Card Operation			
<input type="checkbox"/> New ATM Card No.: International Network : "UnionPay"Card will be issued as default if not specified Dual Currency ATM Card is only applicable to CUP network				<input type="checkbox"/> New ATM Card No.: <input type="checkbox"/> Set up/Cancel Reminder Message Services <input type="checkbox"/> Reset/Cancel/Suspend/Reactivate Internet Banking <input type="checkbox"/> Set up/Cancel Letter of Indemnity - I6			
DML / DEX / DPB CPB / CEX / CML / CML-CLK PBI / EXI / MLI / MLI-CLI		<input type="checkbox"/> Cirrus		DML / DEX / DPB CPB / CEX / CML / CML-CLK PBI / EXI / MLI / MLI-CLI			
PIN Mailer Serial No.:		TIN Mailer Serial No.:		PIN Mailer Serial No.:		TIN Mailer Serial No.:	
Processed by	Processed on	Signature Verified/ TIN Verified Signing No. ( )	Checked by	Processed by	Processed on	Signature Verified/ TIN Verified Signing No. ( )	Checked by