

## 更改個人資料 Change Personal Information

客戶名稱: \_\_\_\_\_ 帳戶號碼: \_\_\_\_\_  
Account Name: \_\_\_\_\_ Account No.: \_\_\_\_\_

本人 / 吾等現通知貴公司更新 本人 / 吾等於貴公司所持之戶口的資料 :  
I / We would like to update the following change(s) to the accounts maintained with the Company under the Name(s) of Account Holder(s).

**更改住址/ 通訊地址/ 電郵地址 Please change my residential address / correspondence address / email address**  
住宅地址 Residential Address: \_\_\_\_\_  
通訊地址 Correspondence Address: \_\_\_\_\_  
電郵地址 Email Address: \_\_\_\_\_

\* 請提供三個月內之新的地址證明 Please provide new address proof within the last 3 months

**更改就業資料 Please change my Employment Details:**  
 Currently employed 就業  Self employed 自僱  Full-time investor 全職投資者  Retired 退休  Unemployed 待業  
Name of Employer 僱主名稱: \_\_\_\_\_

(if self employed, name of Business 如自僱, 請提供客戶業務名稱)

Type of business 業務性質 : \_\_\_\_\_ Occupation/position 職業/職位 : \_\_\_\_\_

Business address 客戶公司地址 : \_\_\_\_\_

Business Phone 公司電話 : \_\_\_\_\_ Period with firm 任職年期: \_\_\_\_\_

**更改財政狀況 Please change my Financial Information**  
Approximate annual income (HK\$) 每年收入 (港幣) :  
 < \$200,000  \$200,000 - \$500,000  > \$500,000  
Approximate net value of my/our assets (in HK\$) (including real estates, cash deposit at bank, shares, bonds, warrants)  
大約資產淨值(以港幣計) (包括物業、銀行存款、股票、債券、認股權證等) :  
 < \$1,000,000  \$1,000,000 - \$5,000,000  > \$5,000,000

**更改聯絡電話號碼 Please change my new contact number**  
電話號碼 Telephone No.(住宅 / Residential): \_\_\_\_\_ (辦公室 / Office): \_\_\_\_\_  
手提電話號碼 Mobile Phone No.: \_\_\_\_\_ 傳真機號碼 Fax: \_\_\_\_\_

**更改往來銀行及帳戶 Please change the bank and account number**  
銀行名稱 Name of bank: \_\_\_\_\_  
銀行戶口號碼 Bank Account No.: \_\_\_\_\_

**更改通訊方式 (發送結單及通知) Please change the method of communication (For statement & notices)**  
 郵寄 Mailing  電郵 E-mail  傳真 Fax  其他 Others \_\_\_\_\_

**其他 Others:** \_\_\_\_\_

\*\* 生效日期 Effective Date : \_\_\_\_\_

本人 / 吾等確認以上提供之資料乃真實、完整及正確。  
I / We confirm that the information above is true, complete and correct.

\_\_\_\_\_  
客戶簽署 Signature(s) of client(s) S.V. \_\_\_\_\_ 日期 Date

內部使用 For Internal Use

備註 Remarks: \_\_\_\_\_ 日期 Date: \_\_\_\_\_

經手人:  核對:  批准:   
Prepared by: \_\_\_\_\_ Checked by: \_\_\_\_\_ Approved by: \_\_\_\_\_