

客户推荐计划表格
Member-Get-Member Referral Form

致: 中信银行(国际)有限公司 (「银行」)
To: China CITIC Bank International Limited (the “Bank”)

请以英文正楷填写 Please complete in English **BLOCK LETTERS**

客户(受荐人) 姓名 Name of Customer (Referee)	
身份证明文件号码 ID Document Number	
本人确认以下人士为推荐本人开立私人银行服务之推荐人: I confirm that the following person is the referrer who refers me to join Private Banking Services:	
推荐人姓名 Name of Referrer	
推荐人号码 Referrer no.	
<p>本人明白及同意客户推荐计划的推荐人奖赏及奖赏方法将会受有关条款及细则约束及限制。</p> <p>I understand and agree that the Member-Get-Member Referral Program, including the Referrer Incentive and the means of Referrer Incentive to be rewarded, will be bound by and subject to the terms and conditions.</p> <p>客户(受荐人) 签署 Signature of Customer (Referee): _____ 日期 Date: _____</p>	

2025 年第一季私人银行客户推荐计划 (「推荐计划」) 之条款及细则

- 推广期为 2025 年 1 月 1 日至 2025 年 3 月 31 日止(包括首尾两日, 下称「推广期」)。
- 此推荐计划的「推荐人」必须为银行之现有客户, 并持有银行的港元存款户口。
- 「全新客户」指于银行收到此填妥的私人银行客户推荐计划表格 (「推荐表格」) 的日期前 12 个月内, 未曾于银行以个人或联名名义持有任何往来、储蓄、定期存款及/或投资户口之客户 (「受荐人」)。
- 「全新资金」指全新客户新存入银行且并非从银行任何户口转账而来的资金。
- 「总结存」包括客户以其个人名义开立及以其联名名义开立并作为基本户口持有人之存款、投资户口结存及经由本行分销之人寿保险计划之已缴累积保费。
- 受荐人于推广期内成功开立银行的私人银行户口, 并存入全新资金, 及于开户翌月起 3 个月内维持平均总结存达等值 HK\$8,000,000 或以上, 推荐人可享 HK\$5,000 现金回赠(「推荐人奖赏」)。
- 每名推荐人于推广期内最高可获 HK\$100,000 推荐人奖赏。
- 有关银行私人银行迎新礼遇详情, 请致电银行私人银行代表 (852) 3603 6088 查询。
- 受荐客户必须于推荐表格上填写推荐人的姓名及推荐人号码及签署。除非推荐表格已按银行要求填妥及由被推荐人签署, 否则将不获发任何推荐人奖赏。
- 推荐人不可推荐自己成为全新客户。
- 每位现有客户, 不论现时持有的是个人单名账户或与其他人共同持有的联名账户, 均可以个人名义成为此推荐计划的推荐人。
- 对于每次成功的推荐, 推荐人奖赏只会赠与一位推荐人。
- 于受荐人成功开立有关私人银行户口后的第 5 个月或以前, 有关推荐人奖赏将存入合资格推荐人的港元存款户口。在银行依据此推荐计划给与推荐人奖赏时, 受荐人必须仍然为银行的私人银行客户。推荐人必须仍然为银行客户, 并持有银行的港元存款户口。倘若推荐人不论任何原因, 已取消或关闭其银行户口, 银行将保留提供相关奖赏的权利, 而毋须另行通知。
- 客户同意及确认除本条款及细则另有明文订明外, 本条款及细则订约方以外的任何人士概不可按照《合约 (第三者权利) 条例》(香港法例第 623 章) 的规定强制执行本条款及细则的条款或享有其利益。倘本条款及细则的任何条文明确赋予任何第三方权力根据《合约 (第三者权利) 条例》执行本条款及细则任何条款, 则协议订约方保留权利可在毋须该第三方同意的情况下修改该条款或本条款及细则任何其他条款。
- 银行员工不能参加是次推荐计划。
- 银行保留权利可以随时更改、暂停或取消此推荐计划, 及删除、取代、增补或修改任何其条款及细则, 而毋须事先通知, 银行将不会负责或承担任何就此推荐计划引致之任何费用、收费、损失或责任。如有任何争议, 银行将有最终决定权。

17. 本条款及细则根据香港特别行政区的香港法律管辖和诠释，如引起任何争议，或者与其有关之任何争议均应提交由香港特别行政区法院处理。
18. 条款及细则之中英文版本内容如有任何歧义，一概以英文版为准。

个人资料收集声明

1. 你所提供的数据属银行所有，银行只会就推荐计划使用该等数据，包括作核对及通知用途。
2. 若客户未能向银行提供推荐计划要求之相关资料，将不能获享推荐人奖赏。
3. 银行会对所收集的资料保密，并且不会将该等数据提供予第三方。
4. 你有权要求查阅及更改本身的个人资料。如欲提出此要求，请致函至银行数据保障主任(地址：香港鲗鱼涌英皇道 979 号太古坊太古坊二座 30 楼)提出有关要求。
5. 根据《个人资料(私隐)条例》的条款，银行有权就处理任何查阅数据的要求收取合理费用。
6. 银行在收到资料后会继续持有该等资料 6 个月，或至有关法律和法规所规定的期限完结。该等资料保留 6 个月后将被保密销毁。

Terms and Conditions for 2025Q1 Private Banking Member-Get-Member Referral Program ("Referral Program")

1. The promotion period runs from 1 January 2025 to 31 March 2025 (both dates inclusive, hereinafter called the "Promotion Period").
2. A "Referrer" for this Referral Program must be an existing customer of the Bank who holds a HKD deposit account.
3. A "New-To-Bank Customer" refers to a customer who does not hold any current, savings, time deposits and/or investment accounts (either in its sole name or in joint name with another) with the Bank within the past 12 months from the date of the relevant Private Banking Member-Get-Member Referral Form (the "Referral Form") received by the Bank ("Referee").
4. "New Funds" refer to the cash which are newly placed by a New-To-Bank Customer through the Bank and not transferred from any accounts of the Bank.
5. "Total Balance" includes deposits and investments balance of customer's all sole name accounts and all joint-name accounts (in which the customer is the primary account holder) with the Bank.
6. Upon a Referee successfully opening a Private Banking Account and depositing New Funds with the Bank within the Promotion Period, and maintaining an average Total Balance of not less than HK\$8,000,000 (or equivalent) for 3 consecutive months from the following month of Private Banking Account opening month, the relevant Referrer will be rewarded with HK\$5,000 cash rebate ("Referral Incentive").
7. During the Promotion Period, each Referrer is entitled to a maximum of HK\$100,000 Referrer Incentive (Up to 20 referees from referral).
8. For details of the welcome offer of Private Banking, please call the Bank's Private Banking Representative on (852) 3603 6088.
9. Referee must provide the name of the Referrer and the Referrer no. and sign on the Referral Form upon account opening. No Referral Incentive will be rewarded unless the Referral Form is completed and signed by the Referee to the satisfaction of the Bank.
10. Referrers cannot refer themselves as New-to-Bank Customers.
11. Every existing customer is eligible to be a Referrer under this Referral Program in its own name as an individual, regardless of whether he/she holds an account in his/her sole name or in joint name with another.
12. For each successful referral, Referral Incentive will only be rewarded to one Referrer.
13. The Bank will credit the amount of the relevant Referral Incentive to the eligible Referrer's HKD deposit account in the 5th month or before from the opening date of the relevant Private Banking Account of the Referee. The Referee must remain to be a customer of Private Banking Account. The Referrer must remain to be a customer of the Bank with HKD deposit account at the time of Referral Incentive awarded under this Referral Program. If the relevant account of the Referrer is subsequently closed or cancelled by any party for whatever reason, the Bank reserves the right not to reward the Referrer with the Referral Incentive without further notice.
14. Except as otherwise expressly stated in these Terms and Conditions, no one other than a party to these Terms and Conditions may enforce any of its terms under the Contracts (Rights of Third Parties) Ordinance, Cap. 623 of the Laws of Hong Kong. Where any clause of these Terms and Conditions entitles any third party to enforce any term of these Terms and Conditions under the Contracts (Rights of Third Parties) Ordinance, the parties reserve the right to vary that term or any other term of these Terms and Conditions without the consent of that third party.
15. The staff of the Bank cannot participate in this Referral Program.
16. The Bank reserves the right to change, suspend or discontinue the Referral Program and delete, replace, supplement or amend any of these Terms and Conditions without prior notice, and shall not be responsible for any costs, expense, losses or liabilities incurred. In the event of any matter or dispute arising out of or in connection with these Terms and Conditions, the decision of the Bank shall be final and conclusive.
17. These Terms and Conditions shall be governed by and construed in accordance with the laws of Hong Kong Special Administrative Region and are subject to prevailing regulatory requirements. Any dispute arising out of or in connection therewith shall be referred to the courts of Hong Kong SAR.

18. In the event of any inconsistencies between the English and the Chinese versions of these Terms and Conditions, the English version shall prevail.

Personal Information Collection Statement

1. The personal data you provide belongs to the Bank, which will use the information for the Referral Program only, including verification and notification purposes.
2. If a customer fails to supply the information required for the Referral Program, the Referrer Incentive will be forfeited.
3. Data collected by the Bank will be kept confidential, and the Bank will not provide such information to any third party.
4. You have the right to request access to and correction of your personal data. If you would like to make such a request, please submit it to the Bank's Data Protection Officer by post at 30/F., Two Taikoo Place, Taikoo Place, 979 King's Road, Quarry Bay, Hong Kong.
5. In accordance with the terms of the Personal Data (Privacy) Ordinance, the Bank has the right to charge a reasonable fee for the processing of any data access request.
6. The Bank shall continue to hold the data for a period of 6 months or such other period as prescribed by applicable laws and regulations. The data will be destructed confidentially after holding for a period of 6 months.

银行专用 FOR BANK USE ONLY			
	Referrer Details		Referee Details
	Name:		Name:
	Customer ID number:		Date of Account Opening:
RM Declaration			
I declare that the Referee (New-To-Bank Customer) is referred by the Referrer (Existing Customer of the Bank) and is NOT referred by any other business partner(s) or staff of the Bank. And I have reiterated to the Referee that the Referrer may receive a Referrer Incentive from the Bank.			
	Name	Signature	Date
Relationship Manager			
Team Head			
Checked by CMT			