

投保申請書編號 Application Number																			
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注意事項：

- 請以**正楷**填寫本第三者付款聲明書（「聲明書」）。
- 切勿在空白或尚未填妥之聲明書上簽署，或留空任何部分。
- 如對本聲明書有任何更改或修正，敬請閣下在更改或修正的位置旁簽署作實。
- 請於填妥並簽署本聲明書後連同相關文件一併於簽署日期**10天內**提交至香港年金有限公司（「香港年金公司」）。如香港年金公司在簽署日期起逾**10天**後收到閣下的聲明書，香港年金公司保留權利要求閣下簽署及提交新的聲明書。
- 如有任何查詢，可透過以下途徑與香港年金公司聯絡：

客戶服務熱線	：	(852) 2512-5000
客戶服務電郵	：	cs@hkmca.hk
申請服務及客戶服務中心地址	：	香港九龍觀塘偉業街180號 Two Harbour Square 19樓
辦公時間	：	星期一至星期五，上午9時至下午6時 (公眾假期除外)

IMPORTANT NOTES:

- Please complete this Third Party Payment Declaration Form (the “Declaration Form”) in **BLOCK LETTERS**.
- Do not sign a blank or incomplete Declaration Form or leave any space blank.
- Any changes or amendments to this Declaration Form should be counter-signed by you.
- Please complete, sign & submit this Declaration Form with the relevant documents to HKMC Annuity Limited (“HKMCA”) within 10 days of the signing date. If the Declaration Form is received by HKMCA after 10 days of the signing date, HKMCA reserves the right to request you to sign and submit a new Declaration Form.
- If you have any enquiries, you may contact us through the following channels:

Customer Service Hotline	：	(852) 2512-5000
Customer Service Email	：	cs@hkmca.hk
Application Servicing and Customer Service Centre Address	：	19/F, Two Harbour Square 180 Wai Yip Street, Kwun Tong Kowloon, Hong Kong
Office hours	：	Monday to Friday, 9 a.m. to 6 p.m. (except public holiday)



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第一部分 準保單持有人資料
PART I PROPOSED POLICYOWNER'S INFORMATION

姓名 Name	姓 Surname	名 First and Middle Name
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第二部分 第三者付款人資料
PART II THIRD PARTY PAYOR'S INFORMATION

1. 姓名 Name (須與身份證明文件相同) (As shown on Identification Document)	中文姓名(先寫姓氏) Name in Chinese (Surname First)	英文姓名(先寫姓氏) Name in English (Surname First)
2. 與準保單持有人的關係 Relationship with Proposed Policyowner	<input type="checkbox"/> 配偶 Spouse <input type="checkbox"/> 兄弟姐妹 Siblings <input type="checkbox"/> 父母 Parents <input type="checkbox"/> 子女 Child <u>備註Notes:</u> - 就第三者付款而言，只接受上列類別人士作出之第三者付款。 - 第三者付款人必須為18歲或以上人士 - For third party payments, only payments by person(s) in the categories listed above will be accepted. - Third Party Payor must be 18 years old or above	
3. 身份證明文件類別 Type of Identification Document (請提交身份證明文件副本) (Please provide a copy of the identification document)	<input type="checkbox"/> 香港身份證 Hong Kong Identity Card <input type="checkbox"/> 護照 Passport <input type="checkbox"/> 其他Others (請詳述: Please specify: _____)	
4. 身份證明文件號碼 Identification Document Number		
5. 出生日期 Date of Birth	_____ / _____ / _____ 日 DD 月 MM 年 YYYY	
6. 國籍 Nationality (如多於一個國籍/公民身分，請註明所有國籍/公民身分) (For more than one nationality/citizenship, please specify all nationalities/citizenships)	(必須填寫) (Must fill in)	
	1. _____	
	2. _____	
3. _____		

第二部分 第三者付款人資料 (續)
PART II THIRD PARTY PAYOR'S INFORMATION (CON'T)

<p>7. 現時住宅地址 Current Residential Address</p> <p>(請盡量以英文填寫) (Please complete in English if available)</p> <p>— 郵政信箱恕不接受 — P.O. Box will not be accepted</p>	<p>室 Flat 樓 Floor 座 Block</p> <hr/> <p>大廈名稱 Building</p> <hr/> <p>屋苑名稱 Estate</p> <hr/> <p>街道名稱及號碼 Street Number and Street Name</p> <p><input type="checkbox"/> 香港 Hong Kong <input type="checkbox"/> 九龍 Kowloon <input type="checkbox"/> 新界 New Territories</p> <hr/> <p>城市 City 國家或地區 Country or Territory</p>
<p>8. 永久地址 Permanent Address</p> <p>(請盡量以英文填寫) (Please complete in English if available)</p> <p>— 郵政信箱恕不接受 — P.O. Box will not be accepted</p>	<p><input type="checkbox"/> 與現時住宅地址相同 Same as Current Residential Address <input type="checkbox"/> 如不同，請填寫此欄 If different, please complete</p> <p>室 Flat 樓 Floor 座 Block</p> <hr/> <p>大廈名稱 Building</p> <hr/> <p>屋苑名稱 Estate</p> <hr/> <p>街道名稱及號碼 Street Number and Street Name</p> <p><input type="checkbox"/> 香港 Hong Kong <input type="checkbox"/> 九龍 Kowloon <input type="checkbox"/> 新界 New Territories</p> <hr/> <p>城市 City 國家或地區 Country or Territory</p>
<p>9. 聯絡電話號碼 Contact Telephone Number</p>	<p>國家或地區號碼 區域號碼 電話號碼 Country or Territory Code Area Code Phone Number</p>

第二部分 第三者付款人資料 (續)
PART II THIRD PARTY PAYOR'S INFORMATION (CON'T)

10. 職業狀況 Occupation Status	<input type="checkbox"/> 退休 Retired * <input type="checkbox"/> 家庭主婦 Housewife * <input type="checkbox"/> 在職 Employed ^
閣下是否曾經從事任何業務、專業或曾經受僱? Have you ever been engaged in any business, profession or been employed?	<input type="checkbox"/> 是 Yes (請在下面提供前業務或職業資料 Please provide former business or occupation details below) <input type="checkbox"/> 否 No (請跳到第11題 Please skip to Q.11)
	前業務或職業資料* Former Business or Occupation Details* 現時業務或職業資料^ Current Business or Occupation Details^
閣下已離開前一份職業多久? How long have you left the former occupation?	
僱主名稱 Name of Employer	
辦事處地址 Business Address	
公司業務性質 Nature of Business	
職業/職位 Occupation/Title	
服務/任職年期 Years of Service/ Employment	
11. 資金來源 Source of Funds	<input type="checkbox"/> 薪酬 Salary <input type="checkbox"/> 收入 Income <input type="checkbox"/> 儲蓄 Savings <input type="checkbox"/> 投資 Investment <input type="checkbox"/> 退休金 Pension <input type="checkbox"/> 遺產 Legacy <input type="checkbox"/> 其他 Others (請詳述: Please specify: _____)

* 如屬退休人士或家庭主婦，請在「前業務或職業資料」欄提供前一份職業資料

* If you are a retiree or housewife, please provide last occupation details under "Former Business or Occupation Details" column

^ 如屬在職人士或正從事某業務或職業，請提供現時業務或職業資料

^ If you are currently employed or engaged in a business or occupation, please provide current business or occupation details

第三部分 付款金額及方式
PART III PAYMENT AMOUNT & METHOD

由第三者付款人繳付之金額 Payment Amount made by the Third Party Payor	港幣HK\$ _____ 元		
付款日期 Date of Payment	_____ / _____ / _____ 日 DD 月 MM 年 YYYY		
付款方式 Payment Method	<input type="checkbox"/> 支票Cheque/ 本票Cashier's Order	支票號碼/ 本票號碼 Cheque number/ Cashier's Order number	
		銀行名稱 Name of Bank	
	<input type="checkbox"/> 銀行轉賬 Bank Transfer	戶口號碼 Account Number	
		銀行名稱 Name of Bank	

第四部分 聲明及簽署
PART IV DECLARATIONS AND SIGNATURES

本人作為第三者付款人，謹此作出以下聲明：

本聲明書內及隨本聲明書提交的相關文件內所提供之資料及所作出的陳述及答案均屬真實、正確及完整，並作為簽發以上投保申請書編號的保單的基礎。如任何以上所提供的資料並不真實、正確及完整，可導致任何已簽發之保單失效。

本人謹此確認已閱讀並明白香港按揭證券有限公司和其附屬公司有關《個人資料（私隱）條例》的收集個人資料聲明內容（詳見本聲明書第五部分）。本人明白香港年金公司不會在未經本人同意下將本人於本聲明書中提供之個人資料作直接促銷用途。

本人同時亦聲明，該筆投保香港年金計劃（「此計劃」）申請之付款是為準保單持有人之利益而作出，乃屬自願性質。

本人為準保單持有人，謹此確認及同意：

此計劃的投保申請之保費將由第三者付款人支付。

I, the Third Party Payor, hereby declare that:

All written information provided by me in this Declaration Form and other documents submitted together with this Declaration Form by me are true, accurate and complete and shall form the basis of the issuance of the policy of the captioned Application Number. If any of the above written information is not true, accurate or complete, any policy issued hereunder may be void.

I confirm that I have read and understand the contents of the personal information collection statement of The Hong Kong Mortgage Corporation Limited and its subsidiaries in relation to the Personal Data (Privacy) Ordinance (please see Part V of this Declaration Form for details). I understand that HKMCA will not use my personal data provided in this Declaration Form for direct marketing purposes without my consent.

I further declare that my payment for the application for the HKMCA Annuity Plan (the "Plan") has been voluntarily made for the benefit of the Proposed Policyowner.

I, the Proposed Policyowner, hereby acknowledge and agree that:

The premium of this application for the Plan is to be paid by the Third Party Payor.

SIGN 

第三者付款人簽署
Signature of Third Party Payor

第三者付款人姓名
Name of Third Party Payor

日期（日／月／年）
Date (DD/MM/YYYY)

SIGN 

準保單持有人簽署
Signature of Proposed Policyowner

準保單持有人姓名
Name of Proposed Policyowner

日期（日／月／年）
Date (DD/MM/YYYY)

若本聲明書是由準保單持有人之法定授權代表簽署，請填寫此欄。
Please complete this part if this Declaration Form is signed by the Lawful Attorney of the Proposed Policyowner.

SIGN 

準保單持有人之法定授權代表簽署
Signature of Lawful Attorney of Proposed
Policyowner

準保單持有人之法定授權代表姓名
Name of Lawful Attorney of Proposed
Policyowner

日期（日／月／年）
Date (DD/MM/YYYY)

第五部分 收集個人資料聲明(「本聲明」) PART V PERSONAL INFORMATION COLLECTION STATEMENT (“PICS”)

1. 本聲明不會限制資料當事人在《個人資料(私隱)條例》下所享有的權利。
2. 除非有關資料收集表格中注明為必要的個人資料，否則提供個人資料屬自願性質。如該注明為必要的個人資料未獲提供，將導致我們無法完成如下所述的目的。

目的

3. 使用資料當事人個人資料的目的將取決於資料收集的情況和背景，但我們認為的目的將包括下列所述：
 - (a) 管理、維持及營運我們與融資、貸款及收購貸款、退休規劃、保險及信貸支援業務相關的產品／服務／活動(「業務」)；
 - (b) 處理及評估任何涉及資料當事人的與我們業務相關的申請、要求、查詢或投訴；
 - (c) 提供涉及資料當事人的與我們業務相關的後續或持續的服務，包括但不限於提供資料、管理已發出的保單或擔保或已提供的貸款或信貸支援；
 - (d) 任何有關我們的業務的索賠或請求的目的，包括相關的核實及調查工作，而無論該索賠或請求是資料當事人提出的、或針對資料當事人的、或涉及資料當事人的；
 - (e) 偵查、調查及防止欺詐、罪行、不當行為或違規情況；
 - (f) 協助按揭證券公司集團的任何成員設計其產品／服務／活動；
 - (g) 為市場推廣、統計、精算、產品研發或其他目的進行調研及維持資料庫；
 - (h) 就本聲明所列任何目的，不時對所持有的與資料當事人有關的個人資料進行核對及核實第三方提供的資料和資訊；
 - (i) 評估任何來自或涉及資料當事人的與我們業務相關的日後的申請；
 - (j) 建立及維持資料當事人檔案及分類及業務營運模式，以及進行風險管理；
 - (k) 登記資料當事人及管理透過電訊或網上平台或流動應用程式而提供的業務；
 - (l) 進行核保、身份及信貸審查及債務追收；
 - (m) 向資料當事人提議、提供及促銷本公司、按揭證券公司集團的其他成員或我們的商業夥伴的業務(詳見以下「直接促銷中個人資料的使用及提供」部分)；
 - (n) 進行與資料當事人的商業合作(包括轉介或其他形式的合作)；
 - (o) 向資料當事人發送關於按揭證券公司集團任何成員的關於教育、消閒或其他活動的通訊及印刷品；
 - (p) 向資料當事人提供優惠以作客戶關係管理用途；
 - (q) 依照任何適用的法律、規則、規例、實務守則或指引的要求進行披露，或以此協助香港或其他地區的警方或其他政府或監管機構執法及調查；
 - (r) 遵守我們預期或一般須遵從的任何適用的司法管轄區的法律、監管要求及任何其他規則、指引或指令；
 - (s) 遵守為符合制裁或防止或偵測清洗黑錢、恐怖分子融資活動或其他非法或禁止的活動或行為而制訂的按揭證券公司集團內共用個人資料和資訊及／或其他個人資料和資訊使用而指定的任何責任、要求、政策、程序、措施或安排；
 - (t) 供我們的實際或潛在承讓人，或就我們對資料當事人享有權利的參與人或從屬參與人衡量有關轉讓、參與或從屬參與所涉交易；及
 - (u) 與上述任何目的直接有關的目的。

資料承轉人

4. 個人資料會予以保密，但取決於所適用的法律，我們可能就以上第3段所列的目的將其提供給以下各方(不論在香港境內或境外)：
 - (a) 按揭證券公司集團的任何成員；
 - (b) 資料當事人在香港或其他地區的任何經紀人、推薦人或介紹人；
 - (c) 任何聯名申請人或聯名借款人，及為資料當事人就我們的業務所承擔的責任擬提供或正在提供財務或信貸支援的人士；
 - (d) 任何參與按揭證券公司集團成員營運的有關我們業務的計劃的商業夥伴；
 - (e) 與任何有關本公司或按揭證券公司集團的任何成員提供的業務的索賠有關的任何人士，不論該索賠是資料當事人提出的、或針對資料當事人的、或涉及資料當事人的；
 - (f) 在香港或其他地區對按揭證券公司集團的任何成員有保密責任，並為其提供行政、審計、資料處理、文件管理、科技、通訊、存儲、支付或其他服務(包括直接促銷服務)的任何代理人、承辦商或第三方；
 - (g) 如適用，與我們的業務相關的任何承保人或再保險人(包括該再保險人的任何再保險人)或就我們的業務提供財務支援的任何實體；
 - (h) 任何由或將由業務獲取的資金來支付的估價方、醫療服務提供方或產品或服務的提供方；
 - (i) 信貸資料服務機構，或在涉及違約時，債務追收代理；
 - (j) 任何代理人、核數師、會計師、稅務顧問、律師、顧問或其他專業顧問；

第五部分 收集個人資料聲明(「本聲明」)(續)
PART V PERSONAL INFORMATION COLLECTION STATEMENT (“PICS”) (CON’T)

- (k) 香港或其他地區的任何法院、裁判院或行政、政府或監管機構，或執法機關(包括本地或外地的稅務機關)；及
- (l) 任何實際或潛在承讓人、受讓人、我們的權利或業務的參與人或從屬參與人。

直接促銷中個人資料的使用及提供

5. 我們擬：

- (a) 將我們持有的資料當事人的姓名、聯絡資料、業務組合資料、交易模式及行為、財務、就業或其他背景及人口統計數據不時用於直接促銷，而除非獲得資料當事人的同意或表示不反對，否則我們不能使用該等資料；及
- (b) 對以下類別的產品／服務／活動進行直接促銷：
 - (i) 保險、金融服務、退休規劃及相關產品／服務／活動；及
 - (ii) 獎賞、會員、聯名商品或禮遇計劃，及相關產品／服務／活動。

6. 以上產品／服務／活動可能由我們及／或下列人士提供或推薦：

- (a) 按揭證券公司集團的任何成員；
- (b) 第三方金融機構及承保人；及
- (c) 第三方獎賞、會員、聯名商品或禮遇計劃的供應商或營運商。

7. 除促銷上述產品／服務／活動外，我們亦可能將以上第5(a)段所列的資料當事人的資訊提供予以上第6段所列的全部或任何人士，以供該等人士在促銷該等產品／服務／活動中使用，而我們為此用途須獲得資料當事人書面同意(包括表示不反對)。

如資料當事人不希望我們如上述使用其個人資料或將其個人資料提供予其他人士作直接促銷用途，資料當事人可通知我們行使其選擇權拒絕促銷。

查閱及改正資料的權利

8. 資料當事人可以書面形式向我們的個人資料保障主任提出查閱或改正其個人資料的要求，其通訊地址為：香港九龍觀塘偉業街180號Two Harbour Square 19樓。

9. 我們可就處理任何查閱資料的要求收取不超乎適度的費用。

本聲明中，除非文義不許可或另有所指，

「本公司」、「我們」及「我們的」指收取相關個人資料的文件中所述的公司(其為按揭證券公司集團成員)及其繼承人及承讓人；

「資料當事人」就個人資料而言，指屬該個人資料的當事人的個人；及

「按揭證券公司集團」指香港按揭證券有限公司、其附屬公司及附屬企業。

注意

- (a) 本聲明可由我們不時修改或更新。
- (b) 資料當事人使用或繼續使用或參加任何我們的產品／服務／活動、提供其本人資料、或向我們提供服務或與我們簽訂商業或其他合同安排時，資料當事人被視為已經接受及同意本聲明所陳述的安排及受相關條款約束。

由本公司刊發

第五部分 收集個人資料聲明(「本聲明」)(續)
PART V PERSONAL INFORMATION COLLECTION STATEMENT (“PICS”) (CON’T)

1. Nothing in this PICS shall limit the rights of data subjects under the Personal Data (Privacy) Ordinance.
2. The supply of personal data is voluntary except for the personal data specified in the relevant data collection form as obligatory. Failure to supply such obligatory data will prevent us from fulfilling the purposes described below.

PURPOSES

3. The purposes for which personal data of a data subject may be used will vary depending on the circumstances and context of its collection, but the purposes perceived by us will include the following:
 - (a) administering, maintaining and operating our products/services/events relating to our financing, loans and loans acquisition, retirement planning, insurance and credit support businesses (**Services**);
 - (b) processing and evaluating any applications, requests, enquiries or complaints involving the data subject relating to our Services;
 - (c) providing subsequent or ongoing services in relation to our Services involving the data subject, including but not limited to providing information, administering the policies or guarantees issued or the loans or credit supports granted;
 - (d) any purposes in connection with any claim or requests made by or against or otherwise involving the data subject in respect of our Services, including the related verification and investigation work;
 - (e) detecting, investigating and preventing fraud, crime, wrongdoing or irregularity;
 - (f) facilitating design of products/services/events of any members of the HKMC Group;
 - (g) conducting research and maintaining databases for marketing, statistical, actuarial, product development or other purposes;
 - (h) matching any personal data held which relates to the data subject from time to time for any of the purposes listed herein and verifying data or information provided by any third party;
 - (i) creating and maintaining data subject profile and segregation and business model and performing risk management;
 - (j) evaluating any future application by or involving the data subject in relation to our Services;
 - (k) registering data subjects and administering the provision of Services through telecommunications or online channels, or mobile applications;
 - (l) conducting underwriting, identity and credit checks and debt collection;
 - (m) offering, providing and marketing to the data subject the Services of the Company, other members of the HKMC Group or our business partners (see “Use and Provision of Personal Data in Direct Marketing” section below)
 - (n) carrying out business co-operation with the data subject (including referral or other modes of co-operation);
 - (o) sending to the data subject newsletters and printed materials about educational, recreational or other events of any member of the HKMC Group;
 - (p) providing benefit to the data subject for relationship management purposes;
 - (q) making disclosures as required by any applicable law, rules, regulations, codes of practice or guidelines or for assisting law enforcement purposes, investigations by police or other government or regulatory authorities in Hong Kong or elsewhere;
 - (r) complying with the laws, regulatory requirements and any other rules, guidelines or orders of any applicable jurisdiction which we are expected to or would normally comply with;
 - (s) complying with any obligations, requirements, policies, procedures, measures or arrangements for sharing personal data and information within the HKMC Group and/or any other use of personal data and information for compliance with sanctions or prevention or detection of money laundering, terrorist financing or other unlawful or prohibited activities or conduct;
 - (t) enabling an actual or potential assignee of us, or participant or sub-participant of our rights in respect of a data subject to evaluate the transaction intended to be the subject of the assignment, participation or sub-participation; and
 - (u) purposes directly relating to any of the above.

TRANSFEREES

4. Personal data will be kept confidential but, subject to the provisions of any applicable law, may be provided to the following parties (within or outside Hong Kong) for the purposes outlined in paragraph 3 above:
 - (a) any member of the HKMC Group;
 - (b) any broker, referrer or introducer of the data subject in Hong Kong or elsewhere;
 - (c) any co-applicant or co-borrower, and any person proposing to provide or providing any financial or credit support in relation to a data subject's obligations in connection with our Services.
 - (d) any business partner which has participated in programmes operated by any member of the HKMC Group in relation to our Services;
 - (e) any person in connection with any claims made by or against or otherwise involving the data subject in respect of any Services provided by the Company or any member of the HKMC Group;

- (f) any agent, contractor or third party, which provides administrative, audit, data-processing, document management, technology, telecommunication, storage, payment or other services (including direct marketing services) to any member of the HKMC Group in Hong Kong or elsewhere under a duty of confidentiality to the same;
- (g) where applicable, any insurer or reinsurer (including any re-insurers of such reinsurer) of, or any entity providing financial support in relation to our Services;
- (h) any valuer, medical service provider or a provider of products or services which is, or will be paid by funds drawn from the Services;
- (i) credit reference agencies or, in the event of default, debt collection agencies;
- (j) any agent, auditor, accountant, tax adviser, lawyer, consultant or other professional adviser;
- (k) any court, tribunal or administrative, governmental or regulatory body or enforcement agency in Hong Kong or elsewhere (including local or foreign tax authorities); and
- (l) any actual or potential assignee, transferee, participant or sub-participant of our rights or business.

USE AND PROVISION OF PERSONAL DATA IN DIRECT MARKETING

5. We intend to:

- (a) use the names, contact details, Services portfolio information, transaction pattern and behaviour, financial, employment or other background and demographic data of a data subject held by us from time to time for direct marketing and we cannot use such data unless we have received the data subject's consent or indication of no objection; and
- (b) conduct direct marketing in relation to the following classes of products/services/events:
 - (i) insurance, financial services, retirement planning and related products/services/events; and
 - (ii) reward, loyalty, co-branding or privilege programmes, and related products/services/events.

6. The above products/services/events may be provided or solicited by us and/or:

- (a) any member of the HKMC Group;
- (b) third-party financial institutions and insurers; and
- (c) third-party reward, loyalty, co-branding or privilege programme providers or operators.

7. In addition to marketing the above products/services/events, we may provide a data subject's information described in paragraph 5(a) to all or any of the persons described in paragraph 6 above for use by them in marketing those products/services/events, and we require the data subject's written consent (which includes an indication of no objection) for that purpose.

If a data subject does not wish us to use or provide to other persons his/her personal data for use in direct marketing as described above, the data subject may exercise his/her opt-out right by notifying us.

RIGHTS OF ACCESS AND CORRECTION

8. A data subject may request access to or correction of his/her personal data by making a request in writing to our Data Protection Officer at 19/F, Two Harbour Square, No. 180 Wai Yip Street, Kwun Tong, Kowloon, Hong Kong.

9. We may charge a fee which is not excessive for processing any data access request.

In this PICS, unless the context does not permit or otherwise requires,

Company, we, our and us mean the company named in the document collecting the relevant data (which is a member of the HKMC Group) and its successors and assigns;

data subject, in relation to personal data, means the individual who is the subject of the personal data; and

HKMC Group means The Hong Kong Mortgage Corporation Limited, its subsidiaries and subsidiary undertakings.

Notes

- (a) This PICS may from time to time be revised or updated by us.
- (b) By using or continuing to use or participate any of our products/services/events, providing information about the data subject himself/herself, or providing services to or entering into commercial or other contractual arrangements with us, a data subject is deemed to have accepted and agreed to the arrangements set out in and to be bound by the provisions herein.