eMPF 積金易 | AIA

AIA MPF – PRIME VALUE CHOICE – SELF-EMPLOYED PERSON APPLICATION FORM
友邦強積金優選計劃 – 自僱人士申請表格

SEPA

Go Green with E-Submission for Efficiency 為更有效率 請使用電子表格

eMPF Web Portal 積金易網上平台

Internal use only 內部專用
eMPF Received Date:
SEPA

Important Notes 重要事項：

1. eMPF Platform Company Limited ("eMPF Company"), a wholly owned subsidiary of the Mandatory Provident Fund Schemes Authority ("MPFA"), will provide the scheme administration services to you through the eMPF Platform, subject to the "General Terms and Conditions of the eMPF Platform" which can be accessed from https://empf.org.hk/tnc/en. 積金易平台有限公司（「積金易公司」）是強制性公積金計劃管理局（「積金局」）的全資附屬公司。積金易公司將根據「積金易平台一般條款及細則」（可於 https://empf.org.hk/tnc 瀏覽），透過積金易平台為你提供計劃行政服務。

General Terms and Conditions of the eMPF Platform 積金易平台一般條款及細則

2. Please read the following before completing this form: 填寫本表格前，請細閱以下部分：
   (i) the MPF Scheme Brochure and the Key Scheme Information Document ("KSID") of the Scheme. You can download the MPF Scheme Brochure and the KSID by visiting the website of MPFA (https://www.mpfa.org.hk/assets/OD/MT00172_AIA_MPF_-_Prime_Value_Choice_EN.pdf) or scanning the QR code as shown in Part A below; and 本計劃之強積金計劃說明書及主要計劃資料文件。你可透過瀏覽積金局的網頁（https://www.mpfa.org.hk/assets/OD/MT00172_AIA_MPF_-_Prime_Value_Choice_CH.pdf）或掃描於下列 A 部分所顯示的二維碼下載強積金計劃說明書及主要計劃資料文件；及
   (ii) Part F "Personal Information Collection Statement" ("PICS") of the eMPF Platform and the Scheme; and F 部分積金易平台及本計劃《收集個人資料聲明》（「聲明」）；及
   (iii) the following Important Notes. 以下重要事項。
3. If the Member is in doubt about the contents of this form, the MPF Scheme Brochure, the KSID or the trust deed ("Trust Deed") of the Scheme, the Member should consult his / her solicitor, accountant or financial advisor. 如成員對本表格、本計劃之強積金計劃說明書、主要計劃資料文件或信託契約（或稱信託契據）的內容有疑問，應該諮詢其律師、會計師或財務顧問。
4. Please complete this form in BLOCK LETTERS with black or blue pen and tick the appropriate box(es). 請用黑色或藍色筆以正楷填寫本表格，並在適當空格內填上剔號。
5. Please countersign beside any amendment with the same signature as shown in Part G Authorization and Declaration. 如有刪改，請於更改位置旁加簽而該簽署必須與 G 部分授權及聲明的簽署相符。
6. The eMPF Platform will process this application upon receipt of this completed form and all relevant supporting document(s) (if any). If there are any omissions (including but not limited to missing page(s) / supporting document(s)), the eMPF Platform may not be able to process this application. 積金易平台收到完整表格及相關證明文件（如有）後，才會處理有關申請。如有遺漏（包括但不限於頁數／證明文件不齊全），積金易平台可能未能執行此申請。
7. The member particulars, including but not limited to member name, identification document no., date of birth, residential address and correspondence address, provided in Part A forms part of tax residency self-certification for an individual account holder specified in Part A below. 於本表格 A 部分提供的成員資料，包括但不限於成員姓名、身分證明文件號碼、出生日期、居住地址及通訊地址，會成為下列 A 部分指明的個別人士帳戶持有人稅務居民身分自我證明的一部分。
8. Information provided in this form will be updated by the eMPF Platform for the individual account holder specified in Part A for the purpose of Automatic Exchange of Financial Account Information ("AEOI") and Common Reporting Standard ("CRS"). The eMPF Platform will update the jurisdiction of tax residency to all your MPF account(s) maintained in the eMPF Platform. 積金易平台會將本表格所提供的資料用作更新 A 部分指明的個別人士帳戶持有人自動交換財務帳戶資料及「共同匯報標準」的用途。積金易平台將會更新你於積金易平台保存的所有強積金帳戶的稅務居民所在司法管轄區。

A. MEMBER PARTICULARS 成員資料

(1) Scheme Details 計劃資料

MPF Scheme Brochure & KSID 強積金計劃說明書及主要計劃資料文件

(i) Name of Trustee 受託人名稱 **AIA Company (Trustee) Limited** **友邦（信託）有限公司** ("the Trustee"「受託人」)

(ii) Scheme Name 計劃名稱 **AIA MPF – Prime Value Choice** **友邦強積金優選計劃** ("the Scheme"「本計劃」)

(2) Title 稱謂 ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☑ Mrs 太太 ☐ Dr 博士

(3) Name 姓名 (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同)

Surname in English 英文姓氏 K I o t h

Given Name in English 英文名字 I r i s ("the Member")

Name in Chinese 中文姓名 (Surname 姓氏) _____ (Given Name 名字) _____ (「成員」)

VC-SEPA-26V2

B. BUSINESS DETAILS 營業資料

(1) Company Name 公司名稱 (If applicable 如適用)

English Irish Kloth

中文 _____

(2) Organisation Type 機構類別

- [x] (i) Sole Proprietorship 獨資企業
- [ ] (ii) Partnership 合夥
- [ ] (iii) Others, please specify 其他，請註明 _____

(3) Registration Type 註冊類別

- [x] (i) (BR) Business Registration [2] 商業登記 [2]
- [ ] (ii) Others, please specify 其他，請註明 (e.g. Private driver, Owners' corporations, Office of Legislative Councilor 例如：私人司機、業主立案法團、立法會議員辦事處) _____

Business / Other Registration No. [2] 商業／其他註冊證號碼 [2] 54845191 Branch No. [2] 分行號碼 [2] ___

[2] For business registration, please provide 8 digits business registration no. and 3 digits branch code. 如屬商業登記，請提供包括 8 個位的商業登記證號碼及 3 個位的分行號碼。

(4) Nature of Business 業務性質

- [ ] (i) Antiques 古董業
- [ ] (ii) Arms / Weapons / Military Force / Military Firms 軍火／武器／軍隊／軍事企業
- [ ] (iii) Art, Audio, Visual and Music Industry 藝術、音響、視覺及音樂行業 (e.g. Film / Television / Music Production 例如：電影／電視／音樂製作)
- [ ] (iv) Casino / Gambling / Gaming Entertainment 賭場／博彩／休閒娛樂 (e.g. Baths / Masseur / Snooker Centre / Disco / Night Club 例如：浴室／按摩院／桌球室／的士高／夜總會)
- [ ] (v) Catering 餐飲業
- [ ] (vi) Cleaning 清潔業
- [ ] (vii) Community / Social / Personal Services 社區／社會／個人服務業
- [ ] (viii) Construction 建造業
- [ ] (ix) Embassies 大使館
- [ ] (x) Finance / Insurance / Real Estate / Business Services 金融／保險／地產／商用服務
- [ ] (xi) Hairdressing and Beauty 理髮及美容業
- [ ] (xii) High-value Goods Trading 高價值商品貿易 (e.g. Precious Metals and Stones / Automobile / Artworks / Airplanes / Vessels 例如：貴金屬及寶石／汽車／藝術品／飛機／船隻)
- [ ] (xiii) Manufacturing 製造業
- [ ] (xiv) Mining and Quarrying 採礦及採石業
- [ ] (xv) Money Services 金錢服務 (e.g. Currency Exchange / Money Remitters / Cheque Cashiers 例如：貨幣兌換／匯款／支票兌現)
- [ ] (xvi) Pawn 典當業
- [ ] (xvii) Religious, Charities and Non-Profit Organizations 宗教、慈善及非牟利機構
- [ ] (xviii) Security Guard Services 保安服務業
- [ ] (xix) Transportation 運輸業
- [ ] (xx) Virtual Asset Services 虛擬資產服務 (e.g. Crypto Currency / Digital Currency Services 例如：加密貨幣／數碼貨幣服務)
- [ ] (xxi) Wholesale / Retail / Import and Export Trades 批發／零售／出入口貿易
- [x] (xxii) Others, please specify 其他，請註明 coaching

(5) Job Title 職銜 _____

(4) Contribution Frequency for Mandatory Contributions and Voluntary Contributions (If applicable) 強制性供款及自願性供款 (如適用) 供款週期

☐ (i) Annually 每年 (i.e. Contribution period is from 1 December to 30 November of each year and contribution day will be set as the last day of the Scheme Financial Year, i.e. 30 November of each year 即供款期由每年 12 月 1 日至 11 月 30 日及供款日將定為計劃財政年度的最後一天，即每年的 11 月 30 日)

☒ (ii) Monthly 每月 (i.e. Contribution period is from the first day to the last day of each calendar month and contribution day will be set as the last day of each calendar month 即供款期由每個公曆月的首天至最後一天及供款日將定為每個公曆月最後一天)

(5) Voluntary Contributions 自願性供款 (If applicable 如適用)

(i) Voluntary Contributions Commencement Date 自願性供款生效日期 | 0 | 1 | / | | | / | | | | | DD / MM / YYYY 日／月／年

(Voluntary Contributions Commencement Date must be **ON OR AFTER** the Date of Joining the Scheme 自願性供款生效日期必須為參加計劃日期當天或之後)

(ii) Regular Contribution 定期供款

☐ a. Fixed Amount 固定金額 HKD 港幣 _____ 元 ☐ b. Fixed Percentage of Relevant Income 有關入息的固定百分比 _____ %

- The maximum monthly and yearly contribution amount is HKD10,000 and HKD120,000 respectively. 按月及年供款的最高供款金額分別為港幣10,000元及港幣120,000元。

(iii) Source of Fund 資金來源

Please choose one of the options below only and provide supporting document(s) for the proof of source of fund (if applicable). Additional documents may be requested on a case-by-case basis by the eMPF Platform. 請只揀選下列其中一項及提供資金來源證明文件 (如適用)。積金易平台會根據具體情況要求提供額外文件。

☐ **a. Salary 薪金**

- Monthly salary 月薪

_____

☐ **b. Personal savings 個人儲蓄**

- Name of bank 銀行名稱

_____

- Total amount 總金額

_____

☐ **c. Investment holdings 持有投資**

- Description of investment 投資說明

_____

- Value of investment 投資價值

_____

☐ **d. Inheritance 遺產**

- Details of the inheritance 遺產詳情

_____

- Date received the inheritance 繼承遺產日期

_____

- Inheritance amount 遺產金額

_____

☐ **e. Sale of property 出售物業**

- Address of property 物業地址

_____

_____

- Sales proceeds 出售收益

_____

- Date of sale 出售日期

_____

☐ **f. Maturing investments or insurance policy 投資或保單到期**

- Description of investment 投資說明

_____

- Proceeds received from the investments or policy 從投資或保單所得的款項

_____

- Date of maturity 到期日

_____

☐ **g. Others 其他**

- Nature of the income / wealth 收入／財富的性質

_____

- Received amount 所收金額

_____

- Date of receipt 收款日期

_____

- If you are tax resident in a reportable jurisdiction [4] of Hong Kong, you will be classified as a reportable person for AEOI, the Trustee will be legally obliged to pass on the information provided in this self-certification and other financial information with respect to your account(s) to the Hong Kong Inland Revenue Department ("IRD"), and they will transmit this information to the tax authorities of which you are tax resident. 如你的稅務居民所在地屬香港申報稅務管轄區[4]，你將會被界定為自動交換資料下的申報對象，受託人在法律上有義務將你於本自我證明申報的資料，你財務帳戶有關的某些財務資料轉交予香港稅務局，而相關資料或會與你作為稅務居民所屬的稅務機關交換。
- The member particulars, including but not limited to member name, identification document no., date of birth, residential address and correspondence address, provided in Part A forms part of this self-certification. 於 A 部分提供的成員資料，包括但不限於成員姓名、身分證明文件號碼、出生日期、居住地址及通訊地址，會成為本自我證明的一部分。
- This self-certification will remain valid unless there is any change in circumstances relating to information that makes this self-certification incorrect, inaccurate or incomplete. You must notify the eMPF Platform / the Trustee and provide an updated self-certification within 30 days of such change in circumstances. 除非情況有所改變而引致已提交的自我證明上的資料不正確、不準確或不完整，否則該已提交的自我證明仍具十足效力。如情況有所改變，你務必通知積金易平台／受託人，並需要在發生改變後 30 天內向積金易平台／受託人提供一份已更新的自我證明。
- The eMPF Platform **MUST** obtain the complete and valid tax residency self-certification for the setting up of member account. To avoid any delay in the setting up of member account and contribution settlement (if any), please read and complete all the appropriate parts below. 積金易平台在開立成員帳戶前，**必須**取得完整及有效的稅務居民身分自我證明。為避免成員帳戶開立及供款處理 (如有) 有任何延誤，請細閱並完成以下所有適用部分。
- The eMPF Platform / The Trustee has right to require you to provide all relevant identification / verification documentation. Failure in providing the information and other personal data as requested may result in your application / instruction not being able to be processed. 積金易平台／受託人有權要求你提供所有相關的身分證明／驗證文件。如未能提供所需資料及其他個人資料，可能導致你的申請／指示不獲處理。
- Kindly note that the eMPF Platform / the Trustee is not allowed to offer any tax or legal advice to you. For tax-related questions, please consult your tax adviser or visit the OECD (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) and IRD's AEOI website (http://www.ird.gov.hk/eng/tax/dta_aeoi.htm), or simply scan the QR code, for more CRS and related information. 請注意積金易平台／受託人不獲允許向你提供稅務或法律意見。任何稅務相關的疑問，請詢問專業稅務顧問或瀏覽 OECD (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) 及稅務局 (http://www.ird.gov.hk/chi/tax/dta_aeoi.htm) 有關自動交換財務帳戶資料的網頁，或掃描此二維碼，以獲取更多 CRS 及相關資料。

OECD-CRS　　IRD 稅務局

- For the terms and expressions in this part, please refer to https://www.ird.gov.hk/eng/pdf/2016/terms.pdf. 請參考 https://www.ird.gov.hk/chi/pdf/2016/terms.pdf 以查閱本部分的名詞及措辭釋義。

(1) My Tax Residence is 本人之稅務居住地為 (Please tick one of the appropriate boxes. 請在其中一個適當的方格上填上剔號。)

☑ (i) Hong Kong ONLY, with no tax residence in any other jurisdictions / countries (and the TIN is my HKID Card No.)
只有香港，及沒有處於任何其他司法管轄區／國家的稅務居住地 (及稅務編號為本人之香港身份證號碼)
(Please skip Part D(2). 請略過 D(2) 部分。)

☐ (ii) Hong Kong (and the TIN is my HKID Card No.) and also some other jurisdictions / countries
香港 (及稅務編號為本人之香港身份證號碼) 及其他司法管轄區／國家
(Please fill out the TIN [3] for all other jurisdictions / countries, other than HK, in the table of Part D(2). 請於 D(2) 部分列出所有香港以外其他司法管轄區／國家的稅務編號[3]。)

☐ (iii) NOT Hong Kong, but instead some other jurisdictions / countries
不是香港而是其他司法管轄區／國家
(Please fill out Part D(2). 請填寫 D(2) 部分。)

(2) Jurisdiction of Tax Residency 稅務居民所在司法管轄區

Please list **(i)** ALL jurisdictions / countries (other than Hong Kong) where the account holder is a resident for tax purposes and **(ii)** the account holder's TIN [3] for each jurisdiction / country. If the space provided is insufficient, please provide it in the below format on additional sheet(s). 請在以下列明 **(i)** 帳戶持有人作為稅務居民的所有司法管轄區／國家 (香港以外)，及 **(ii)** 各司法管轄區／國家發出予帳戶持有人的稅務編號[3]。如下列位置不敷應用，請按以下格式另加新頁。

Jurisdiction / Country of Tax Residency 稅務居民所在司法管轄區／國家		TIN [3] 稅務編號 [3]	If no TIN available, please indicate Reason A, B or C [5] below 若未能提供稅務編號，請於下方填上理由 A、B 或 C [5]	Please explain why you are unable to obtain a TIN if you selected Reason B. 若你選擇理由 B，請在下方解釋無法取得稅務編號的原因。
a.				
b.				
c.				

[3] For more guidance on a TIN, please visit the OECD website at https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-identification-numbers/, or simply scan the QR code. 如欲了解相關稅務居民司法管轄區發佈的稅務編號，你可瀏覽 OECD 網頁 https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-identification-numbers/ ，或掃描此二維碼。

OECD-TIN

[4] For the list of reportable jurisdictions of Hong Kong, please refer to the IRD's website at https://www.ird.gov.hk/eng/tax/aeoi/rpt_jur.htm. 有關香港申報稅務管轄區名單，請參考稅務局的網頁：https://www.ird.gov.hk/chi/tax/aeoi/rpt_jur.htm 。

[5]
- Reason A 理由 A - The jurisdiction / country where the account holder is a resident for tax purposes does not issue TINs to its residents. 帳戶持有人所屬的稅務居民的司法管轄區／國家沒有向其居民發出稅務編號。
- Reason B 理由 B - The account holder is unable to obtain a TIN. (Please explain why the account holder is unable to obtain a TIN in the above table if the account holder has selected this reason.) 帳戶持有人無法獲得稅務編號。(若帳戶持有人選擇這理由，請在上表解釋帳戶持有人無法獲得稅務編號的原因。)
- Reason C 理由 C - No TIN is required. (Note: Only select this reason if the authorities of the relevant jurisdictions / countries of residence do not require the TIN to be disclosed.) 無需稅務編號。(註：只有在相關司法管轄區／國家的主管當局不需要披露該司法管轄區／國家發出的稅務編號方可選擇這理由。)

✦ Warning 警告：
It is an offence under section 80(2E) of the Inland Revenue Ordinance if any person, in making a self-certification, makes a statement that is misleading, false or incorrect in a material particular AND knows, or is reckless as to whether, the statement is misleading, false or incorrect in a material particular. A person who commits the offence is liable on conviction to a fine at level 3 (i.e. HKD10,000). 根據《稅務條例》第 80(2E) 條，如任何人在作出自我證明時，在明知一項陳述在要項上屬具誤導性、虛假或不正確，或罔顧一項陳述是否在要項上屬具誤導性、虛假或不正確下，作出該項陳述，即屬犯罪。一經定罪，可處第 3 級 (即港幣10,000元) 罰款。

E. INVESTMENT MANDATE 投資授權 (Continued 續)

DIS / Fund Code 預設投資策略／基金編號	Investment Strategy / Name of Constituent Fund 投資策略／成分基金名稱	Investment Allocation Percentage 投資分配百分比							
		Mandatory Contributions 強制性供款				Voluntary Contributions 自願性供款			
Dynamic Asset Allocation Funds 動態資產配置基金									
3H	China HK Dynamic Asset Allocation Fund 中港動態資產配置基金				%				%
93	Manager's Choice Fund 基金經理精選退休基金				%				%
Equity Funds 股票基金									
L3	Asian Equity Fund 亞洲股票基金		3	0	%				%
E3	European Equity Fund 歐洲股票基金				%				%
D3	Greater China Equity Fund 大中華股票基金		1	0	%				%
N3	North American Equity Fund 北美股票基金		6	0	%				%
53	Green Fund 綠色退休基金				%				%
Guaranteed Fund 保證基金									
T3	Guaranteed Portfolio 保證組合				%				%
Lifestyle Funds 人生階段基金									
W3	Growth Portfolio 增長組合				%				%
B3	Balanced Portfolio 均衡組合				%				%
V3	Capital Stable Portfolio 穩定資本組合				%				%
Retirement Income Fund 退休收益基金									
3J	Retirement Income Fund 退休收益基金				%				%
Default Investment Strategy Funds 預設投資策略基金									
NF	Core Accumulation Fund [7] 核心累積基金 [7]				%				%
NA	Age 65 Plus Fund [7] 65 歲後基金 [7]				%				%
	Total 總數	1	0	0	%	1	0	0	%

[6] These Constituent Funds are not index-tracking funds. 有關成分基金不是緊貼指數基金。

[7] Automatic de-risking features of the DIS do not apply to these constituent funds as standalone investments (rather than as part of the DIS). 預設投資策略的自動降低風險機制並不適用於作為該等成分基金的獨立投資 (而非預設投資策略的一部分)。

g. for complying with applicable laws and regulations, and any request or direction of, or responding to requests from, regulators, law enforcement agents or other government authorities; 遵從適用的法律和法規，以及監管機構、執法機關或其他政府部門的任何要求或指示，或回應其要求；
h. for protecting or exercising our rights, including but not limited to dealing with your complaints or inquiries, and taking any legal actions; 保障或行使本公司的權利，包括但不限於處理你的投訴或查詢，以及採取任何法律行動；
i. for handling any legal, regulatory or administrative proceedings, investigations or inquiries before any court or competent authority; 處理任何法庭或主管機關的法律、監管或行政管理程序、調查或查詢；
j. for detecting, investigating and preventing crime and other unlawful or suspicious behaviour or activities in connection with your MPF schemes and the eMPF Platform; 偵查、調查及防止與你的強積金計劃及「積金易」平台有關的犯罪及其他違法或可疑行為或活動；
k. for any other purposes or functions from time to time specified or designated under the MPFSO and any other applicable laws and regulations, and for facilitating compliance with the Anti-Money Laundering and Counter-Terrorist Financing Ordinance (Chapter 615 of the Laws of Hong Kong) and any other applicable laws and regulations by approved trustees and MPF scheme providers of your MPF schemes; 根據《強積金條例》及任何其他適用法律及法規不時訂明或指定的其他目的或職能，以及為協助你的強積金計劃核准受託人及強積金計劃營辦人遵守《打擊洗錢及恐怖分子資金籌集條例》（香港法例第 615 章）及任何其他適用法律及法規；
l. with your consent (including any indication of no objection), for conducting direct marketing in accordance with Section 4 below, whether for itself or on behalf of approved trustees of your MPF schemes; and 經你同意（包括表示不反對），根據下文第 4 條為本公司或代表你的強積金計劃的核准受託人進行直接促銷；及
m. other purposes directly relating to any of the above. 其他與任何上述內容有直接關係的用途。

We may use artificial intelligence and other technology tools to process and analyze personal data for the purposes set out above. 我們可能使用人工智能及其他科技工具來處理及分析個人資料，以達致上述目的。

3. Classes of Transferees 承轉人類別

Your personal data may be transferred or disclosed to the following parties for the purposes mentioned above: 你的個人資料可能就上述用途被移轉或披露予下列人士：

a. your employer(s) and approved trustee(s) of your MPF scheme(s), and your medical practitioner(s) in respect of any of your applications for early withdrawal of MPF; 你的僱主，強積金計劃的核准受託人，以及就你任何提早提取強積金的申請所涉及的醫護人員；
b. our agents, advisers, service providers, contractors and / or other third parties who provide administrative, telecommunications, computer, payment, fraud prevention, insurance, data processing, information technology, legal, accounting, operational and / or other services or support in connection with the operations of the eMPF Platform or MPF scheme administration; 任何就積金易平台的營運或強積金計劃的行政管理而向本公司提供管理、電訊、電腦、付款、反欺詐、保險、資料處理、資訊科技、法律、會計、營運及 / 或其他服務或支援的代理人、顧問、服務供應商、承辦商及 / 或其他第三方；
c. the Mandatory Provident Fund Schemes Authority (**"MPFA"**), other government authorities and agencies, courts, regulatory or administrative bodies, law enforcement agencies and other bodies or persons to whom we are under an obligation to make disclosure under any legal, regulatory or administrative requirements applicable to us; and 強制性公積金計劃管理局（**「積金局」**）、其他政府部門及機構、法庭、監管機構或行政管理機構、執法機構及其他機構或人士，如本公司須按照任何適用法律、法規或行政命令向其作出披露；及
d. any other person as agreed with you from time to time. 你不時同意的任何其他人士。

Your personal data may be provided to any of the above parties who may be located in or outside of Hong Kong. If we do transfer your personal data outside of Hong Kong, we will do so in compliance with the requirements of the PDPO. 你的個人資料可被提供予任何位於香港境內或境外的上述人士。如本公司將你的個人資料轉移至香港境外，我們會遵照《私隱條例》的相關規定行事。

4. Direct Marketing 直接促銷

With your consent, we may use your name, contact details, date of birth, business registration / identification number, financial background, demographic data and information about your MPF schemes, transaction patterns and your interactions with the eMPF Platform (as applicable) for the purposes of: 經你同意，本公司可能使用你的姓名、聯絡資料、出生日期、商業登記證 / 身份證號碼、財務狀況、有關你的強積金計劃的統計數據及資料、在積金易平台（若適用）的交易模式和互動情況，作下列用途：

a. marketing the eMPF Platform and related products and services; and 宣傳積金易平台及相關產品和服務；及
b. offering or advertising the availability of the MPFA's facilities or services relating to its publicity, promotional, educational or other similar activities. 提供或推廣積金局在宣傳、推廣、教育或其他類似活動方面的設施或服務。

With your written consent, we may provide your personal data as mentioned in the paragraph above to the approved trustees of MPF schemes in which you participate or have participated in and such approved trustees may transfer your personal data to the MPF scheme provider of such MPF schemes, each for their direct marketing of: 經你書面同意，本公司可能將你的個人資料（如上段所述）提供予你所參與或曾參與的強積金計劃的核准受託人，而該核准受託人可能將你的個人資料轉移予其強積金計劃營辦人，用作其各自直接促銷以下各項：

a. pension, financial, insurance and related services and products; and 退休金、金融、保險及相關服務和產品；及
b. rewards, loyalty or privileges programmes and related services and products. 獎賞、忠誠或特選計劃及相關服務和產品。

You may withdraw your consent at any time by paper form or via the web portal. Once your request is processed by us, we will not use your personal data and / or will not transfer the same to the relevant approved trustees (as the case may be) for direct marketing purposes. 你可隨時透過書面表格或網上平台取消你的同意。本公司於完成處理你的取消同意的要求後，將不會使用你的個人資料及 / 或不會將你的個人資料移轉予相關核准受託人（視乎情形而定）作直接促銷用途。

5. Access and Correction 查閱及更正

You may request access to, or correction of, your personal data being held by us. For any such request, please contact our Data Protection Officer: 你可要求查閱或更正本公司所持有關於你的個人資料。如需提出有關要求，請聯絡我們的資料保護主任：

Mail: PO Box 98929 Tsim Sha Tsui Post Office
郵寄：尖沙咀郵政局郵政信箱 98929 號
Email 電郵：dpo@support.empf.org.hk

Please note that all data access or correction requests should be made by using the Data Access Request Form from time to time specified by the Privacy Commissioner for Personal Data. You may also visit any one of the eMPF Service Centres in person to obtain and submit the form. 請注意，所有個人資料查閱或更正的要求均須使用個人資料私隱專員不時指明的《查閱資料要求表格》作出。你亦可親身前往任何一間積金易服務中心索取及遞交有關表格。

We may refuse to comply with a data access or correction request in the circumstances specified in sections 20 or 24 of the PDPO, including but not limited to circumstances where the data access or correction request is not made in Chinese or English. 請注意，本公司可在《私隱條例》第 20 或 24 條訂明的情況下拒絕遵從個人資料查閱或更正的要求，包括但不限於當有關個人資料查閱或更正的要求並非以中文或英文作出。

G. AUTHORIZATION AND DECLARATION 授權及聲明

By signing this form, the Member ("I") 在簽署本表格，成員 (下稱「本人」) :

1. I hereby covenant with the Trustee to comply with and be bound by the provisions of the Trust Deed, the Rules (if applicable to the Scheme), this form and all applicable laws and regulations of Hong Kong Special Administrative Region of the People's Republic of China. By signing this form, I hereby give to the Trustee such covenants, warranties, undertaking and indemnities as required by the provisions of the Trust Deed. 本人謹與受託人契諾遵守信託契約 (或稱信託契據)、規則 (如適用於本計劃)、本表格及中華人民共和國香港特別行政區所有適用法例與法規內之條款並受其約束。在簽署本表格，本人按有關信託契約 (或稱信託契據) 之要求謹此向受託人提供契諾、保證、承諾及賠償。
2. I confirm that I have received, read and understood the terms / contents of: 本人確認已收到、閱讀及明白以下條款／內容：
   (i) the General Terms and Conditions of the eMPF Platform; and 積金易平台一般條款及細則；及
   (ii) the latest MPF Scheme Brochure and the KSID of the Scheme and thoroughly understand the features, benefits and charges of the Scheme; and 本計劃最新的強積金計劃說明書及主要計劃資料文件，並充分瞭解有關本計劃的特點、權益及收費；及
   (iii) the PICS of the eMPF Platform and the Scheme as set out in this form relating to the use and disclosure of my personal information by the eMPF Platform / the Trustee, I confirm that my personal information may be used and disclosed for the purposes and to the persons as stated in the PICS; and 本表格所載的積金易平台及本計劃「聲明」有關積金易平台／受託人使用及披露本人的個人資料，本人確認本人的個人資料可按「聲明」所述的目的使用及披露，及向所指明的人士披露；及
   (iv) the Important Notes in this form. 本表格的重要事項。
3. I acknowledge and agree that the information in Part D will be updated by the eMPF Platform for all my MPF account(s) maintained in the eMPF Platform for the purpose of AEOI and CRS. 本人知悉及同意 D 部分的資料將會更新本人於積金易平台保存的所有強積金帳戶用作自動交換財務帳戶資料及「共同匯報標準」的用途。
4. Pursuant to the legal provisions for AEOI provided under the Inland Revenue Ordinance (Cap. 112), I acknowledge and agree that: 根據《稅務條例》(第 112 章) 有關自動交換財務帳戶資料的法律條文，本人知悉及同意：
   (i) the information contained in this form (which includes any additional sheet(s)) is collected and may be kept by the eMPF Platform / the Trustee for the purpose of AEOI; and 積金易平台／受託人可收集本表格 (包括任何額外紙張) 所載資料並可備存作自動交換財務帳戶資料用途；及
   (ii) such information and information regarding the account holder and any reportable account(s) may be reported by the Trustee to the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region and exchanged with the tax authorities of another jurisdiction or jurisdictions in which the account holder may be resident for tax purposes; and 受託人可把該等資料及關於帳戶持有人及任何須申報帳戶的資料向香港特別行政區政府稅務局申報，從而把資料轉交到帳戶持有人的居留司法管轄區的稅務當局；及
   (iii) I agree to the obligation that the account holder must comply with requests made by the eMPF Platform / the Trustee to comply with the CRS (AEOI) requirements under the Inland Revenue Ordinance and / or applicable law and regulation, and such obligation forms the basis of the account to be opened. 本人同意帳戶持有人必須遵守積金易平台／受託人的要求以便遵守《稅務條例》及／或適用法律及規例的 CRS (AEOI) 規定，並為日後開立帳戶之基礎。
5. I undertake to advise the eMPF Platform / the Trustee of any change in circumstances which affects the tax residency status of the individual identified in Part D or causes the information provided herein to become incorrect, inaccurate or incomplete, and to provide the eMPF Platform / the Trustee with a suitably updated self-certification within 30 days of such change in circumstances. 本人承諾，如情況有所改變，以致影響於 D 部分所述的個人的稅務居民身分，或引致提供的資料不正確、不準確或不完整，本人會通知積金易平台／受託人，並會在情況發生改變後 30 天內，向積金易平台／受託人提交一份已適當更新的自我證明。
6. I hereby authorize any government office or any organisation or persons who has any records, information of me to disclose, release or transfer to the Trustee or its representatives such record or information required for processing this application and for administration of the Scheme upon request by the eMPF Platform / the Trustee or its representatives. 本人特此授權持有本人任何紀錄、資料的任何政府辦事處、團體或個人，在積金易平台／受託人或其代表要求下，可向該受託人或其代表透露、發放或轉移就處理本申請及管理本計劃有關的該等紀錄或資料。
7. I declare that the information given and statements made in this form (which includes any additional sheet(s)) are, to the best of my knowledge and belief, true, correct and complete. I further undertake that if there is any change in the information so provided, I shall notify the eMPF Platform / the Trustee of such change as soon as reasonably practicable. 本人聲明，盡本人所知所信，本表格 (包括任何額外紙張) 內所載資料及聲明均屬真實、正確及完整。本人進一步承諾，如果所提供的資料有任何改變，本人會在合理而切實可行範圍內儘快通知積金易平台／受託人。
8. I understand that if I fail to supply complete information as required in this form, the eMPF Platform / the Trustee may not be able to establish my MPF account. 本人明白，如果本人未能提供本表格內所需的所有資料，積金易平台／受託人可能無法建立本人的強積金帳戶。
9. I agree to provide the eMPF Platform / the Trustee with any additional documents and information as the eMPF Platform / the Trustee may reasonably require in order to enable the eMPF Platform / the Trustee to comply with the Anti-Money Laundering and Counter-Terrorist Financing Ordinance and the relevant requirements of the MPF legislation. I understand the eMPF Platform / the Trustee reserve(s) the right to request for such documents and information as it deems appropriate for the purpose of complying with regulatory requirements and conducting client identification and due diligence before completing the application. The eMPF Platform / The Trustee may refuse to complete this application if such documents or information are not provided to the satisfaction of the eMPF Platform / the Trustee. 本人同意在合理情況下向積金易平台／受託人提供一切所需／額外文件及資料，使積金易平台／受託人能遵守《打擊洗錢及恐怖分子資金籌集條例》及強積金法例下的有關規定。本人明白積金易平台／受託人保留權利在完成申請前索取其認為合適的任何文件及資料，以作遵守監管規定和進行客戶身分辨認及盡職審查之目的。如所提供的該等文件或資料未能令積金易平台／受託人滿意，積金易平台／受託人可拒絕本申請。
10. I understand that in case of any doubt about the meaning or effect of this form or any related documents, I should seek professional advice before making any investment decision. I hereby declare that the investment decision indicated herein above in Part E has been reached as a result of my own independent judgment and opinion. 本人明白本人在作出任何投資決定前，如對本表格或任何相關文件的含義或影響有任何疑問，需先尋求專業意見。本人特此聲明於 E 部分之投資決定，乃出於本人之獨立判斷及意見。
11. In the absence of wilful default, gross negligence or fraud, I agree to indemnify and keep the eMPF Platform / the Trustee indemnified against any and all losses, costs, expenses, actions, proceedings suffered by the eMPF Platform / the Trustee related to my participation in the Scheme. 在沒有故意失責、嚴重疏忽或欺詐外的情況下，倘若積金易平台／受託人因執行本人參加本計劃的事宜，而導致積金易平台／受託人需要承擔任何及所有損失、成本、費用或招致任何行動或訴訟，本人同意作出有關賠償予積金易平台／受託人。

Signature of Member ^ 成員簽署 ^	**Date 日期**
	14/10/2026 DD 日 / MM 月 / YYYY 年

^ This signature will be used to verify your correspondences in relation to your MPF account of the Scheme. 此簽署將用於驗證你於本計劃強積金帳戶的相關文件。

✦ Warning 警告：

Pursuant to section 43E of the Mandatory Provident Fund Schemes Ordinance (Cap. 485), a person who, in any document given to (i) the MPFA, (ii) the system operator of the eMPF Platform, or (iii) an approved trustee, knowingly or recklessly makes a statement which is false or misleading in a material respect commits an offence and is liable to a maximum penalty of a HKD100,000 fine and 12 months' imprisonment on the first conviction and a HKD200,000 fine and two years' imprisonment on each subsequent conviction. A person who knowingly and wilfully makes (otherwise than on oath) a statement false in a material particular also commits an offence under section 36 of the Crimes Ordinance (Cap. 200) and is liable on conviction to imprisonment for two years and to a fine. 根據《強制性公積金計劃條例》(第 485 章) 第 43E 條，任何人在給予 (i) 積金局，(ii) 積金易平台的系統營運者，或 (iii) 核准受託人的任何文件中，明知或罔顧後果地作出在要項上屬虛假或具誤導性的陳述，即屬犯罪。首次定罪者，最高可處罰款港幣100,000元及監禁十二個月；其後每次定罪，最高可處罰款港幣200,000元及監禁兩年。根據《刑事罪行條例》(第 200 章) 第 36 條，任何人明知而故意在非經宣誓的情況下在要項上作出屬虛假的陳述，亦屬犯罪。一經定罪，可處監禁兩年及罰款。

MISCELLANEOUS 其他

Would like to know which fund fits you best?
想知那項基金最適合你？

View latest fund fact sheet
閱讀最新一期基金表現概覽

OR visit aia.com.hk

Try out our MPF Investing Style Assessment
試用強積金投資風格評估

OR visit aia.com.hk

To 致: AIA International Limited 友邦保險(國際)有限公司
(Incorporated in Bermuda with limited liability 於百慕達註冊成立之有限公司)
8/F, AIA Financial Centre, 712 Prince Edward Road East, Kowloon, Hong Kong
香港九龍太子道東 712 號友邦九龍金融中心 8 樓
Employer Hotline 僱主熱線: 2100 1888
Member Hotline 成員熱線: 2200 6288

MPF

AIA MPF – PRIME VALUE CHOICE
MPF CUSTOMER DECLARATION AND CONSENT FORM
(FOR EMPLOYEE WITH MORE THAN ONE MPF SERVICE PROVIDER)
友邦強積金優選計劃 – 強積金僱員聲明及同意書
(適用於多於一個強積金服務提供者之僱員)

Please note 請注意:

*Please put a ✓ in the ☐ and delete items marked with * as appropriate. 請於適當方格內填上✓號及於 * 項目刪去不適用者 。*

This declaration and consent form is applicable for conducting regulated activity(ies) under the Mandatory Provident Fund Schemes Ordinance (Cap.485). 此聲明及同意書適用於根據強制性公積金計劃條例(第 485 章)訂明之受規管活動。

Each declaration and consent form applies to one member account only. If you provide the above declaration and consent for more than one Member Account, please submit separate declaration and consent form. 每一聲明及同意書只適用於一個成員賬戶。如需就多於一個成員賬戶給予聲明及同意，請呈交個別聲明及同意書。

PART A: MEMBER PARTICULARS 甲部分: 成員資料

Member Name 成員姓名 : Kloth Iris HKID Card/Passport*No. 香港身份證/護照*號碼 : R613758(9)

AIA eMPF Member Account No 友邦積金易成員賬戶號碼 (8 digits number/New account 八位數字 / 新賬戶) : New A/C

Part B: MPF Intermediary Information 乙部分: 強積金中介人資料

Name of MPF Intermediary 強積金中介人名稱 : Ho Kar Lee

MPF Intermediary Reg. No. 強積金中介人註冊編號 : 112154 Agent Code 營業員編號 : H1690

PART C: MEMBER'S DECLARATION AND CONSENT 丙部分: 成員之聲明及同意

I HAVE been invited, induced or advised by one or more registered MPF intermediaries to transfer to and/or enrol in the AIA MPF – Prime Value Choice (the "AIA MPF Scheme").

I hereby provide my written and express consent that my registered MPF intermediary for receiving monetary and/or non-monetary benefits as stated in the Information About Principal Intermediary and Subsidiary Intermediary. 本人獲註冊強積金中介人邀請、誘使或建議轉移至及 / 或參加友邦強積金優選計劃（簡稱「友邦強積金計劃」）。本人謹此就本人的註冊強積金中介人收取主事及附屬中介人資料所列之金錢利益及 / 或非金錢利益給予書面及明示同意。

I acknowledge that I have received and read the Key Scheme Information Document, MPF Scheme Brochure (including fees and charges), Information About Principal Intermediary and Subsidiary Intermediary, Member's Guide/promotional leaflet applicable to the AIA MPF Scheme and, if applicable, the Guide to Transfer Benefits Under Employee Choice Arrangement. I have been advised by my registered MPF intermediary to refer to the MPF Scheme Brochure for details of the AIA MPF Scheme before making material decisions. 本人確認已收妥及閱讀適用於友邦強積金計劃之主要計劃資料文件、強積金計劃說明書（包括費用及收費）、主事及附屬中介人資料、成員 資料冊 / 宣傳單張及「僱員自選安排」權益轉移指南（如適用）。本人的註冊強積金中介人已建議本人作出關鍵決定前，先參閱強積金計劃說明書以瞭解友邦強積金計劃的詳情。

I have been informed by my registered MPF intermediary that, if I elect to transfer out of any guaranteed fund(s) from the original MPF registered scheme(s) to the AIA MPF Scheme, I may not satisfy some or all of the guarantee conditions of the said guaranteed fund(s) and the relevant guarantee may be disqualified. My registered MPF intermediary has also advised me to check the offering document or consult the trustee of the original MPF registered scheme(s) for details before transferring out of the said guaranteed fund(s). 本人的註冊強積金中介人已告知本人若選擇從原註冊強積金計劃的任何保證基金轉移至友邦強積金計劃，本人可能未能符合部分或所有前述保證基金的保證條款，並因而失去有關保證。本人的註冊強積金中介人亦已建議本人在轉移前述保證基金前，查閱原註冊強積金計劃的銷售文件或諮詢其受託人以瞭解有關詳情。

I hereby confirm that my registered MPF intermediary has explained to me the timeframe involved in the transfer. I understand that during the transfer process from original approved trustee to new approved trustee, there will be a time lag during which the accrued benefits will not be invested. 本人謹此確認本人的註冊強積金中介人已向本人說明轉移權益所涉及的時間。本人明白從原核准受託人轉移至新核准受託人過程需時，過程中累算權益將不會作任何投資。

To 致: **AIA International Limited 友邦保險(國際)有限公司**
(Incorporated in Bermuda with limited liability 於百慕達註冊成立之有限公司)
8/F, AIA Financial Centre, 712 Prince Edward Road East, Kowloon, Hong Kong
香港九龍太子道東 712 號友邦九龍金融中心 8 樓
Employer Hotline 僱主熱線: 2100 1888
Member Hotline 成員熱線: 2200 6288

MPF

AUTHORIZATION FOR THE RELEASE OF MEMBER ACCOUNT INFORMATION (FOR MPF EMPLOYEE MEMBER / SELF-EMPLOYED PERSON / AIA MPF PERSONAL ACCOUNT MEMBER ONLY)
發放成員賬戶資料授權書
(只適用於強積金僱員成員或自僱人士或休悠樂成員)

Please note 請注意:
**Delete as appropriate. 請於 * 項目刪去不適用者。*
Each authorization applies to one member account only. If you request the above service for more than one Member Account, please submit separate authorization. 每一授權書只適用於一個成員賬戶。如需申請多於一個成員賬戶之該項服務，請呈交個別授權書。
Please submit the completed form with original signature, fax copy will not be processed. 請呈交填妥並附有親筆簽署之表格正本，傳真本將不獲處理。

PART A: MEMBER PARTICULARS 甲部分: 成員資料

Member Name 成員姓名: Kloth Iris

HKID Card/Passport*No. 香港身份證/護照*號碼: R613758(9)

eMPF Member Account No 積金易成員賬戶號碼: New A/C

PART B: MEMBER'S AUTHORIZATION 乙部分: 成員之授權

I hereby authorize AIA Company (Trustee) Limited (the "Trustee") to release my account balance (by fund & by source), its detail breakdown (including total contribution / transfer in, total withdrawal and unrealized gain / loss) and investment choices ("Relevant Data") of the above mentioned member account to my MPF Intermediary with details listed below, via the Trustee's Interactive Website for the purposes of assessing and advising me on my need for MPF related services provided by the Trustee ("Relevant Purpose") with immediate effect until there is a change in the MPF Intermediary of the above mentioned plan or such time when I withdraw such authorization or the above member account is terminated.
本人謹此授權友邦(信託)有限公司(「受託人」)透過受託人互動網頁，向下列所示之強積金中介人發放本人於上述成員賬戶內之賬戶結餘(按資金來源及基金類別計算)，其詳細分類(包括供款 / 轉入資產總計 / 提取供款總計及未實現收益 / 虧損)及投資選擇(「有關資料」)，從而為本人就受託人提供之強積金相關服務需要作出評估及建議(「有關目的」)。此項授權將即時生效直至上述計劃之指定強積金中介人有所更改，或本人提出取消此項授權，或上述之成員賬戶已被終止。

(1)	Name of MPF Intermediary 強積金中介人名稱	Ho Kar Lee
(2)	Agency Code 營業組別編號	8489
(3)	Agent / Broker Code 營業員 / 經紀編號	H1690
(4)	Name of Employer Servicing 現服務之僱主名稱 (If applicable 如適用)	

PART C: DECLARATION 丙部分: 聲明

I have read and understood the AIA Personal Information Collection Statement ("AIA PIC"). I declare and agree that any personal data and other information relating to me or my policy(ies) or investments contained in this application or collected, obtained, compiled or held by the Trustee by any means from time to time may be collected and utilized in accordance with the AIA PIC. I acknowledge and consent to the transfer of my personal data in or outside of Hong Kong for the purposes and to the types of transferee as set out in the AIA PIC.
本人已閱讀及明白友邦保險收集個人資料聲明(「收集個人資料聲明」)。本人聲明及同意在本申請書所載或受託人不時以任何方式收集所得、編製或持有的任何個人資料及關於本人或本人的保單或投資的其他資料，可根據收集個人資料聲明收集及使用。本人確認及同意就收集個人資料聲明所述目的在香港境內轉移本人的個人資料或轉移有關資料至香港境外，及轉移予收集個人資料聲明所載的資料承讓人。

I agree to be bound by any instructions sent to the Trustee under my name and signature. I agree to indemnify and keep the Trustee and its affiliates indemnified against any and all losses, costs, expenses, actions, proceedings and liabilities suffered by the Trustee and/or its affiliates as a result of any inaccurate information provided by me or my agent or intermediary, and/or upon the Trustee's or its affiliates' execution of any such instructions except where there is proven (to the satisfaction of the Trustee or its relevant affiliate) wilful default, gross negligence or fraud on the part of the Trustee or its relevant affiliate.
本人同意及接受以本人名義及簽署致受託人之任何指示約束。除因受託人或其相關關聯公司被證明故意失責、嚴重疏忽或欺詐外(此證明須得受託人或其相關關聯公司信納)，倘若本人或本人之代理人或中介人所提供之資料錯誤及/ 或受託人或其關聯公司因執行相關指示，而導致受託人及/或其關聯公司需要承擔任何損失、支出、責任，或需要進行任何行動或訴訟，本人同意作出有關賠償予受託人及其關聯公司。

By signing this form, my authorization above supersedes all of my previous authorization with effect from the date stated below.
本授權書一經簽署，本人於下列所示之日期前所提供之任何授權指示將被本指示取替。

S.V.

Member's Signature (Signature must be the same as the record filed with the Trustee)
成員簽署 (簽署式樣必須與已備存於受託人之記錄相符)

14/10/2026
Date: dd/mm/yyyy
日期: 日/月/年