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友邦廣場 12 樓

AIA Hong Kong
12/F, AIA Tower
183 Electric Road
North Point
Hong Kong

Memo

Attn:	All EDD & Honourable Advisors / EDDs / PSDDs/ SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong only)	From:	Victor Man
Copy:	Mr. Alger Fung / Mr. Jim Jan Zen / Mr. Louie Ho / Ms. Amelie Shen / All Department Heads / ABDD Executives / CSBD Executives / Contact Centre	Dept:	Corporate Solutions
Date:	25 June 2024	Total pages:	1 + Appendix

Subject: (A240660) 積金局已更新表格 PA-AP (PI) [2024 年 6 月版本]
MPFA has updated the Form PA-AP (PI) [Jun 2024 Version]

強制性公積金計劃管理局 (積金局) **於本月更新了「查閱個人帳戶資料授權書 (主事中介人) 」表格 (表格 PA-AP (PI)) 。請由即日起使用最新版本「表格 PA-AP (PI)」，以避免積金局未能處理您為客戶提交的有關查詢**。最新版本表格於右下角已印上「2406」、「June 2024」及「2024 年 6 月」作為記認 (請參閱附件，並在文件中留意這些以黃色突顯的標記) 。另外，請注意，如表格上的資料有任何修改，計劃成員必須在旁簽名作實，且表格內之所有簽名必須相同，否則查詢將不獲處理。

您可透過「營業員專頁」(eAC) 或「積金局」網頁下載最新版本「表格 PA-AP (PI)」：

「營業員專頁」(eAC)： eAC > MPF 營業員專頁 > 工具 > 其他 > 查閱個人帳戶資料 - 表格 Form PA-AP (PI)
「積金局」網頁： www.mpfa.org.hk > 實用工具 > 表格 > 強積金計劃 > 中介人專用 > 查閱個人帳戶資料 - 授權書 (主事中介人)

如有任何查詢，歡迎與負責貴區之企業業務營業拓展部同事聯絡。

Mandatory Provident Fund Schemes Authority ("MPFA") **has updated the "PA Information Enquiry Authorization Form (PI)" (Form PA-AP (PI)) this month. Please use the latest version of Form PA-AP (PI) from now on to avoid any enquiry forms you submitted on behalf of client are not being processed by MPFA.** The latest form are now having "2406", "June 2024" and "2024 年 6 月" marked at the lower right corner (please refer to Appendix and look out for these markers highlighted in yellow in the document). In addition, please note that if there are any changes to the information on the form, scheme members must sign to confirm, and all signatures on the form must be the same, otherwise the inquiry will not be processed.

You may download the latest Form PA-AP (PI) from Agency Corner (eAC) or MPFA websites:

Agency Corner (eAC): eAC > MPF Agency Corner > Tool > Others > Personal Account Information Enquiry (Form PA-AP (PI))
MPFA: www.mpfa.org.hk > Useful Tools > Forms > MPF Schemes > For Intermediary > Personal Account Information Enquiry - Authorization Form (Principal Intermediary)

If you have any questions, please contact your designated CS Business Development representatives.

Yours faithfully,

Victor Man
Head of CS Business Development
(Agency Distribution) - Corporate Solutions

「AIA」、「友邦」或「友邦香港」是指友邦保險 (國際) 有限公司 (於百慕達註冊成立之有限公司
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

Appendix

表格 Form PA-AP (PI)

Personal Account Information Enquiry
Authorization Form (Principal Intermediary)
查閱個人帳戶資料
授權書（主事中介人）

Please complete the form in BLOCK letters
請以正楷填寫表格

Please read and follow the Notes overleaf carefully in completing this Form
請細閱附註及背頁的須知，然後按指示填寫本表格

Particulars of the Scheme Member 計劃成員資料	
Name in English *(same as HKID card/Passport)* 英文姓名*(以香港身分證/護照所載為準)*	
Name in Chinese *(if any)(same as HKID card/Passport)* 中文姓名*（如有）(以香港身分證/護照所載為準)*	
HKID / Passport No.* 香港身分證/護照號碼*	* Please provide copy of HKID / Passport 請附上香港身分證/護照副本
Day-time Telephone No. 日間聯絡電話	

Authorization & Declaration 授權及聲明

I hereby authorize the principal intermediary listed below to enquire and receive details of my personal account(s) including my name, HKID/Passport number, and name, business address and telephone number of the related MPF trustee(s) from the Mandatory Provident Fund Schemes Authority (MPFA).

I understand and accept that when necessary, the authorized principal intermediary may delegate its subsidiary intermediaries and employees or service providers to assist the principal intermediary to properly discharge its duties in connection with the checking.

I declare that to the best of my knowledge and belief, the information given in this Form and the submitted documents is correct and complete.

本人現授權下列主事中介人，向強制性公積金計劃管理局（積金局）查閱及獲取本人的個人帳戶資料，包括本人的姓名、香港身分證/護照號碼、有關強積金受託人的名稱、營業地址及電話。

本人明白並同意，獲授權的主事中介人在有需要的情況下可委任其附屬中介人、僱員或服務提供者，協助其妥善執行有關處理本項查詢的工作。

本人聲明，盡本人所知所信，本表格及隨附文件所提供的資料均屬正確無訛且並無缺漏。

Signature 簽署	Date (DD/MM/YY) 日期（日/月/年）

Particulars of the Authorized Person (Principal Intermediary) 獲授權人（主事中介人）資料		
Principal Intermediary 主事中介人	Name in English 英文名稱	
	Name in Chinese *(if any)* 中文名稱*（如有）*	
	MPF Registration No. 強積金註冊編號	IC
Subject Officer: Subsidiary Intermediary 負責人：附屬中介人	Name in English *(same as HKID card)* 英文姓名*(以香港身分證所載為準)*	
	MPF Registration No. 強積金註冊編號	
	PI's Internal Reference Number *(optional)* 主事中介人內部參考編號*（可留空）*	
	Signature 簽署	Date (DD/MM/YY) 日期（日/月/年）

2406

Note A：
附註甲：

When submitting your request to the MPFA, the authorized person (principal intermediary) is required to sign a declaration stating they have duly obtained authorization from you to check your personal account information and the information relating to the MPF registration particulars of the principal intermediary and subsidiary intermediary in this Form is correct and complete.

獲授權人（主事中介人）向積金局提交你的查詢時，須以書面聲明已獲你正式授權查詢你的個人帳戶資料，並確信本表格提供有關主事中介人及附屬中介人的強積金註冊資料均屬正確無訛且並無缺漏。

It is an offence under Section 43E of the Mandatory Provident Fund Schemes Ordinance if a person makes a false or misleading statement in a material respect to the MPFA and the approved trustees. Convicted offenders are liable to a fine of HK$100,000 and imprisonment for 12 months on the first occasion on which the person is convicted of the offence.

《強制性公積金計劃條例》第 43E 條訂明，任何人如在要項上向積金局或核准受託人作出虛假或具誤導性的陳述，即屬犯罪。首次定罪，可被罰款HK$100,000及監禁 12 個月。

Note B：
附註乙：

Pursuant to Section 157B of the Mandatory Provident Fund Schemes (General) Regulation, Personal Account Register provides the following:

- Number of personal account held by scheme members; and
- Name and contact details of the trustee* for each account.

Please note that the MPFA does not keep records of:

- Particulars of individual members' Personal Account(s), including the scheme name, scheme member account number and accrued benefits.
- Contribution account held by scheme members (including contribution account under current employment, casual employee account under Industry Schemes and self employed persons accounts) and Tax Deductible Voluntary Contribution (TVC) Account.

Please contact the relevant trustee(s)* direct for details of Personal Account(s).

* MPF trustees and their schemes will get onboard the eMPF Platform in sequence one by one. When the scheme has got onboard to the Platform, eMPF Company will utilize the eMPF Platform to perform the administration of the scheme, provide scheme administration services to employer, scheme member and self-employed person and handle the service instructions. From then on, employer, scheme member and self-employed person can manage your MPF on the eMPF Platform and should no longer submit service instructions to MPF trustee; the eMPF Platform will provide the relevant information and/or documents to you directly. Please visit eMPF Website (www.empf.org.hk) for the onboarding timeline of MPF scheme(s) and the relevant information.

根據強制性公積金計劃(一般)規例第157B條，個人帳戶紀錄冊顯示的資料包括：

- 計劃成員擁有的個人帳戶數目；及
- 每個個人帳戶所屬的受託人*的名稱及聯絡電話。

請注意，積金局未有備存以下資料：

- 個別個人帳戶的詳細資料，例如帳戶號碼、帳戶結餘等;及
- 計劃成員的「供款帳戶」（包括現職工作的強積金帳戶、行業計劃臨時僱員帳戶及自僱人士帳戶）及「可扣稅自願性供款帳戶」的紀錄。

有關個別帳戶的詳細資料，請向所屬受託人*查詢。

* 強積金受託人及其計劃將依次序逐一加入「積金易」平台。當計劃加入「積金易」平台後，積金易公司將使用「積金易」平台執行計劃下的行政工作，為僱主、計劃成員及自僱人士提供計劃行政服務及處理服務指示。屆時，計劃成員及自僱人士可透過「積金易」平台管理您的強積金，而無須再向強積金受託人提交服務指示，而「積金易」平台將直接提供有關資訊及/或文件給您。就強積金計劃加入「積金易」平台的日期及相關資訊，可瀏覽「積金易」網站（www.empf.org.hk）。

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Notes

Important Notes for Scheme Member

- You may seek an MPF subsidiary intermediary's assistance in completing this Form.
- Please DO NOT sign on a blank form to prevent a third party from subsequently filling in incorrect or false information. Before you sign on the form, please ensure that all the information have been properly filled in.
- To ensure proper authorization has been given by the scheme member and to protect members' personal data, the MPFA may contact and confirm with the scheme member as and when necessary before processing an enquiry. An enquiry will not be processed if confirmation from the scheme member concerned cannot be obtained.

Notes for Principal Intermediary and Subsidiary Intermediary

(1) This "Form PA-AP (PI)" is designed for the scheme member to authorize the principal intermediary to make enquiry about his/her personal account. When necessary, the authorized principal intermediary may delegate its subsidiary intermediaries and employees or service providers to assist the principal intermediary to properly discharge its duties in connection with the checking.

(2) As the authorized person, the principal intermediary is responsible for distributing the reports to the scheme members. Principal intermediary may distribute the reports via the subsidiary intermediaries (i.e. subject officers) to the scheme members.

(3) The subsidiary intermediary should submit the completed Form together with a copy of identity document of the scheme member to the principal intermediary for submission to the MPFA by batch. The principal intermediary is required to submit the Forms with supporting documents together with a summary sheet for every batch of requests submitted.

(4) The principal intermediary is required to ensure an orderly submission of the completed Forms. Requests with incomplete information will be returned to principal intermediary as rejected cases. Batch requests can be submitted to the MPFA by the principal intermediary via eService made available by the MPFA for registered intermediaries or in person or by post to the designated office of the MPFA (address: Member Protection and Services Division, Level 12, Tower 1, The Millennity, 98 How Ming Street, Kwun Tong, Hong Kong). The MPFA will not accept underpaid mail which will be returned to the sender or disposed of by the Hong Kong Post. The principal intermediary should arrange to pick up the reports in person.

(5) Principal intermediary is required to ensure that it has in place proper personal data handling procedures on submitting requests, collecting and distributing reports and that its subsidiary intermediaries, employees or service providers who are necessarily delegated to assist in any stage of the workflow follow the procedures. Principal intermediary is also required to maintain proper internal audit trails to demonstrate compliance with the procedures.

(6) This Form is valid for one month from the date on which the scheme members signs the Form. Expired forms will not be accepted.

(7) The Form and copy of identity document submitted will not be returned.

(8) For any alteration of information under the section "Particulars of the Scheme Member" on the Form, full signature of the scheme member must be present. For any alteration of information under the section "Particulars of the Authorized Person (Principal Intermediary)", full signature of the scheme member and authorized signatory on the attached Summary Sheet, together with the company chop of the authorized person, must be present. All signatures signed by the scheme member and authorized signatory must be identical.

(9) Corresponding and valid ID documents of the scheme member must be provided. For example, if HKID Card No. is listed in the form, a copy of HKID card must be provided. Non-corresponding and expired ID documents will not be accepted.

(10) The MPFA reserves the right to change the above requirements without prior notice.

Mandatory Provident Fund Schemes Authority
Personal Information Collection Statement

The personal data to be supplied in this Form are for the purposes of processing the enquiry about personal account details. The personal data will be used, disclosed or transferred only for purposes related to the enquiry or where permitted by law. Failure to supply the requisite personal data may result in the MPFA being unable to process the enquiry if it affects the MPFA's ability to retrieve the requested information or contact the scheme member / authorized person or subsidiary intermediary.

If you wish to request access to and/or correction of your personal data held by the MPFA, you may do so in writing addressed to the Personal Data Privacy Officer, Mandatory Provident Fund Schemes Authority.

查閱個人帳戶資料
授權書（主事中介人）

表格 PA-AP (PI)

須知

計劃成員的重要須知

- 你可要求強積金附屬中介人協助填寫本表格。
- **請勿**在空白的表格上簽署，以免被第三者填上不正確或虛假的資料。簽署本表格前，請確保所有資料均已填妥。
- 為確保查詢已獲得適當的授權及保障計劃成員的個人資料，本局在處理查詢時或會與計劃成員聯絡，以核實表格上的資料。如未能核實資料，本局有權不處理有關查詢。

主事中介人及附屬中介人須知

(1) 本「表格PA - AP (P I)」是供計劃成員授權主事中介人代其查詢個人帳戶資料之用。如有需要，獲授權的主事中介人可委任其附屬中介人、僱員或其他服務提供者，協助其妥善執行有關處理本項查詢的工作。

(2) 主事中介人作為獲授權人，須負責把個人帳戶報表（「報表」）派發予計劃成員。主事中介人可經由附屬中介人（即負責人）派發報表予計劃成員。

(3) 附屬中介人應把已填妥的表格連同計劃成員的身分證明文件副本一併交予主事中介人，以便主事中介人一次過把多份表格遞交予積金局。主事中介人遞交表格及有關文件時，須就每批表格提交一份綜合紀錄表。

(4) 主事中介人須確保已填妥的表格會有秩序地遞交予積金局。資料不全的表格將不獲處理，並會退回主事中介人。主事中介人可透過積金局為註冊中介人提供的電子服務或親臨積金局指定辦事處（地址：香港觀塘巧明街98號The Millennity 1座12樓成員保障及服務部）遞交表格，或把表格郵寄至上址。積金局不會接收郵資不足的郵件，有關郵件將由香港郵政退回寄件人或予以銷毀。主事中介人應安排人員親臨積金局領取報表。

(5) 主事中介人須確保已就遞交表格、領取報表及派發報表制訂妥善的個人資料處理程序，並確保其按需要獲委任以協助執行工作流程中任何步驟的附屬中介人、僱員或其他服務提供者，均遵守有關程序。主事中介人並須備存妥善的內部審查線索，證明已遵從程序。

(6) 本表格由計劃成員簽署表格當日起計一個月內有效，逾期遞交的表格將不獲受理。

(7) 已遞交的表格及身分證明文件副本將不予退還。

(8) 表格上“計劃成員資料”部分的資料如有刪改，計劃成員必須在旁簽署作實。此外，“獲授權人（主事中介人）資料”部分的資料如有刪改，計劃成員及於附於此表格上的綜合紀錄表所列明的授權簽署人均須在旁簽署及蓋上獲授權人印章作實。計劃成員及授權簽署人的所有簽署必須相同一致，否則該查詢將不獲處理。

(9) 計劃成員必須提交相符及有效的身分證明文件予本局核對（例如：如在表格上填上香港身分證號碼，便須提交香港身分證副本作為證明文件）。不相符或逾期的身分證明文件將不獲接納。

(10) 本局保留權利更改以上規定而不作事先通知。

強制性公積金計劃管理局
個人資料收集聲明

在本表格提供的個人資料，將用於處理個人帳戶資料的查詢。有關個人資料只會因應與該項查詢有關的用途或在法例允許的情況下加以使用、披露或轉移。如未能提供所需個人資料，以致本局難以抽取所要求查閱的資料或聯絡計劃成員／獲授權人或附屬中介人，則本局可能無法處理你的查詢。

如欲查閱及／或更正你存於本局的個人資料，可致函強制性公積金計劃管理局個人資料私隱主任，提出有關要求。

積金局熱線：2918 0102

2024年6月