友邦香港
香港北角電氣道 183 號
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)	From:	Victor Man
Copy:	Mr. Alger Fung / Mr. Jim Jan Zen / Mr. Louie Ho / Ms. Amelie Shen / All Department Heads / ABDD Executives / CSBD Executives	Dept:	Corporate Solutions
Date:	2 July 2024	Total pages:	2 + Appendix

Subject: **(A240723) 修訂強積金指引及供註冊中介人使用的表格 [發佈於 2024 年 6 月 13 日]**
Revision of MPF Guidelines and Forms for Registered Intermediaries [Published on 13 June 2024]

強制性公積金計劃管理局（「積金局」）於 2024 年 6 月 13 日發佈了以下兩套經修訂的強積金指引（第 11 版）：

(a) 指引 VI.1《強積金中介人註冊及更改通知指引》（「指引 VI.1」）；以及
(b) 指引 VI.3《註冊中介人交付周年申報表指引》（「指引 VI.3」）。

經修訂的指引 VI.1 及指引 VI.3 已分別由 2024 年 6 月 13 日及 2024 年 6 月 26 日起生效。兩套指引的主要修訂如下：

- 在申請註冊為附屬中介人時，**「私人電郵地址」一欄由可選擇性填寫改為必須填寫**（只適用於指引 VI.1 的附件 B）；
- 附屬中介人的私人電郵地址如有任何更改，**須在 7 個工作日內通知積金局**（只適用於指引 VI.1）；
- 更新收集個人資料聲明。

附屬中介人**如在過往尚未向積金局提供私人電郵地址**或**已更改其私人電郵地址，應盡快登入「電子服務」，使用電子表格 INT-7 向積金局匯報其最新私人電郵地址。**根據《註冊中介人操守要求指引》第 III.61(e) 段，主事中介人須訂立管控措施、程序及安排，確保可按照《強制性公積金計劃條例》第 34ZE 及 34ZI 條的規定，通知積金局關乎註冊中介人的改變**（由 2024 年 6 月 13 日起，包括附屬中介人的私人電郵地址）**。任何人無合理辯解而違反第 34ZE 或 34ZI 條的規定，即屬犯罪，可處罰款 50,000 港元。

由 2024 年 7 月 2 日起，積金局**將會透過「電子服務」向註冊中介人發出**附件所載的所有通知、信函或文件（請參考附件），**而不會再以郵遞方式寄發任何實體文本。**註冊中介人如在積金局已備存正確的電郵地址紀錄，便會在積金局透過「電子服務」向他們發出通知、信函或文件時收到電郵提示，提醒他們登入「電子服務」查閱有關通知、信函或文件。

經修訂指引載於積金局網站（www.mpfa.org.hk）內「資訊中心」>「法例與規例」>「指引」一欄。至於經修訂表格則可循以下路徑下載：「實用工具」>「表格」>「強積金計劃」>「中介人專用」，亦可登入「電子服務」系統取用（適用於電子表格 INT-7）。請確保使用修訂版的表格。

如有任何疑問，請致電積金局熱線 2918 0102 查詢。

「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).

友邦香港
香港北角電氣道 183 號
友邦廣場 12 樓

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

Memo

The Mandatory Provident Fund Schemes Authority ("MPFA") has published the following two sets of revised MPF Guidelines (version 11) on 13 June 2024:

(a) Guidelines VI.1 on MPF Intermediary Registration and Notification of Changes (Guidelines VI.1); and
(b) Guidelines VI.3 on Annual Returns to be Delivered by Registered Intermediaries (GuidelinesVI.3).

The revised Guidelines VI.1 and Guidelines VI.3 will take effect from 13 June 2024 and 26 June 2024 respectively. Their major amendments are as follows:

- change the "personal email address" field from optional to compulsory for application for registration as a subsidiary intermediary (SI) (applicable to Annex B to Guidelines VI.1 only);
- any change of personal email addresses for SIs should be notified to MPFA within 7 working days (applicable to Guidelines VI.1 only);
- update the Personal Information Collection Statement (PICS).

If an SI has not provided a personal email address to the MPFA previously or the SI has changed his/her personal email address, he/she should log in to eService to report his/her personal email address to the MPFA using eForm INT-7 as soon as possible. Under paragraph III.61(e) of the Guidelines on Conduct Requirements for Registered Intermediaries, a principal intermediary (PI) should have in place controls, procedures and arrangements to ensure that the MPFA is notified of changes relating to the registered intermediaries (RIs) (including personal email address of SIs with effect from 13 June 2024) in accordance with sections 34ZE and 34ZI of the Mandatory Provident Fund Schemes Ordinance. A person who, without reasonable excuse, contravenes section 34ZE or section 34ZI commits an offence and is liable to a fine at HK$50,000.

From 2 July 2024, the MPFA will send all the notices, letters or documents (please refer to Appendix) provided in Annex to RIs via eService, and physical copies will not be delivered by post. RIs with correct email address records in the MPFA will receive email alerts that remind them to access the notices, letters or documents on eService when the MPFA has sent them such notices, letters or documents via eService.

The revised Guidelines are published at the MPFA's website (www.mpfa.org.hk) under "Information Centre" > "Legislation & Regulations" > "Guidelines". The revised forms can be accessed under "Useful Tools" > "Forms" > "MPF Schemes" > "For Intermediary" or through the "eService" system (for eForm INT-7). Please ensure that you should use the revised version of the forms.

Should you have any questions, please contact our hotline on 2918 0102.

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).
[AIA – INTERNAL]

友邦香港
香港北角電氣道 183 號
友邦廣場 12 樓

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

Memo

附件：「電子服務收件箱」內之通知或文件分類

類別	內容
重要通知	因違反《積金局條例》第 34ZN、34ZO 及 34ZP 條的規定而發出的通知
申請結果及通知	1) 核准現有附屬中介人（個人或持牌長期業務保險代理機構）隸屬主事中介人的隸屬申請通知 2) 確認撤銷隸屬核准 3) 核准作為負責人員 4) 撤銷附屬中介人的註冊 5) 透過電子表格 INT-7 或表格 INT-7 匯報有關更改資料的通知
通函	通函
其他	不屬於上述分類的文件

備註：
透過「電子服務」給予有關核准作為負責人員的通知並不適用於以下情況：
1) 尚未註冊為附屬中介人的個人在核准作為負責人員的申請夾附註冊為主事中介人的申請
2) 尚未註冊為附屬中介人的個人申請作為主事中介人的負責人員（經主事中介人同意）

Appendix: Classification of notices or documents in eService inbox

Categories	Contents
Important Notices	Notices for contravention of the requirements under sections 34ZN, 34ZO and 34ZP of the MPFSO
Application Results and Notices	1) Notices of approval of attachment of existing subsidiary intermediaries (Individual or Licensed Long Term Insurance Agency) to a principal intermediary 2) Confirmation of revocation of approval of attachment 3) Approval as a responsible officer 4) Revocation of registration as a subsidiary intermediary 5) Notice on relevant changes reported through eForm INT-7 and Form INT-7
Circular Letters	Circular letters
Others	Documents that are not classified into above categories

Note:
The giving of notices of approval as a responsible officer via eService does not apply in the following scenarios.
1) The application for approval as responsible officer of an individual, who has not yet been registered as an SI, accompanies an application for registration as a principal intermediary
2) An individual, who has not yet been registered as an SI, applies to become a responsible officer of a PI (with the consent of the PI)

「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).
[AIA – INTERNAL]