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 / Ms. Amy Chan / Mr. Louie Ho / Ms. Amelie Shen / All Department Heads / ABDD Executives / CSBD Executives / Contact Centre	Dept:	Corporate Solutions
Date:	6 March 2025	Total pages:	2 + Appendix
Subject:	**(A250333) AIA 強積金轉移申請表更新** **Update of AIA MPF Transfer Forms**		

我們謹此通知各營業同事，有關 **AIA 強積金轉移申請表現已更新**。有關已更新之表格及版本編號，請參閱下表及附件。

已更新之表格	附件	版本編號	
		新	舊
計劃成員資金轉移申請表 [第MPF(S)-P(M)號表格]	1	2025 年 2 月 – 第 8.7 版	2025 年 1 月 – 第 8.7 版
計劃成員整合個人賬戶申請表 [第MPF(S)-P(C)號表格]	2	2025 年 2 月 – 第 24 版	2025 年 1 月 —第 24 版
「僱員自選安排」- 轉移選擇表格 [第MPF(S)-P(P)號表格]	3	2025 年 2 月 – 第 8.7 版	2025 年 1 月 – 第 8.7 版
計劃成員可扣稅自願性供款轉移申請表 [第MPF(S)-P(T)號表格]	4	2025 年 2 月 – 第 8.7 版	2025 年 1 月 – 第 8.7 版

最新表格可於aia.com.hk下載。

如有任何查詢，歡迎與負責 貴區之營業拓展部同事聯絡或致電 AIA 企業業務熱線 2100 1828。

祝 業務蒸蒸日上!

「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]

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Memo

We are pleased to inform you that related AIA MPF transfer forms have been updated. For the updated forms and version code, please refer to the table below and attachment for details.

Updated Forms	Attachment	Version Code	
		New	Old
Scheme Member's Request for Fund Transfer Form [FORM MPF(S)-P(M)]	1	Version 8.7 – Feb 2025	Version 8.7 – Jan 2025
Scheme Member's Request for Account Consolidation Form [FORM MPF(S)-P(C)]	2	Version 24 – Feb 2025	Version 24 – Jan 2025
ECA Transfer Election Form [FORM MPF(S)-P(P)]	3	Version 8.7 – Feb 2025	Version 8.7 – Jan 2025
Scheme Member's Request for Transfer of TVC Form [FORM MPF(S)-P(T)]	4	Version 8.7 – Feb 2025	Version 8.7 – Jan 2025

The latest forms can be downloaded at aia.com.hk.

If you have any enquiries, please contact your designated sales representatives or call AIA Corporate Solutions Hotline at 2100 1828.

We wish you every success!

Yours faithfully,

Victor Man
Head of CS Business Development
Agency Distribution, Corporate Solutions

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[AIA – INTERNAL]

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Member Hotline 成員熱線: 2200 6288

附件 1

計劃成員轉移強積金累算權益(權益)須知 (適用於自僱人士、個人賬戶持有人或終止受僱的僱員)
《強制性公積金計劃(一般)規例》(第 485A 章)第 145、146、147、148 及 149 條

填寫本表格前,請先閱讀下列重要資料:

(1) **用詞定義:**

(a)「供款賬戶」—指強積金註冊計劃(計劃)下主要用以接收僱主為僱員所作出以及代表僱員所作出的強積金供款包括僱主及僱員部分)或自僱人士所作出的強積金供款的賬戶。

(b)「個人賬戶」—指計劃下主要用以接收由另一供款或個人賬戶轉入的權益的賬戶。

(c)「原受託人」在《 強制性公積金計劃(一般)規例》(《規例》)中亦稱「轉移受託人」)— 指轉出你的權益的計劃的受託人。

(d)「新受託人」在《規例》中亦稱「承轉受託人」)— 指轉入你的權益的計劃的受託人。如你選擇把權益轉 移至同一計劃的另一個賬戶或轉移至同一受託人的另一個計劃,第 MPF(S) - P(M)號表格所指的新受託人將與原受託人相同。

(e)「原計劃」—指轉出你的權益的計劃。

(f)「新計劃」—指轉入你的權益的計劃。如你選擇把權益轉移至同一計劃的另一個賬戶,第 MPF(S)-P(M)號表格所指的新計劃將與原計劃相同。

(2) 如你現時投資於強積金保證基金,從該保證基金轉出權益,可能會導致你不符合部分或所有保證條件,以致影響你享有保證的資格。詳情請查閱原計劃的要約文件,或向原受託人查詢。

(3) 如欲把權益從一個計劃轉移至另一個計劃,請留意轉入賬戶的權益將會如何投資。一般而言,如你 (a)沒有或 尚未就有關賬戶向你的新受託人給予任何投資指示;或(b)已就有關賬戶給予投資指示,要求把權益按照預設投資策略投資,則轉入該賬戶的權益將按照預設投資策略投資。如有需要,請向新受託人查詢詳情。如欲就新計劃的賬戶更改或給予投資指示,亦請聯絡新受託人。

(4) 如你已年滿或快將年滿 50 歲,而現時你的權益是按照計劃的預設投資策略投資,請留意預設投資策略的降低投資風險機制,會由計劃成員年滿 50 歲開始運作。如計劃的受託人在預設投資策略下按年降低你的投資風險的時間,與接獲你的轉移權益申請的時間相當接近,該計劃的受託人將根據其運作程序及在符合《強制性公積金計劃條例》規定的情況下,訂定處理降低風險及轉移權益的次序。如欲瞭解受託人如何處理該等交易,請向相關受託人查詢詳情。

(5) 請確保你在新計劃已開立個人賬戶或供款賬戶。否則,你須先行登記參加該計劃,然後才向新受託人提交第 MPF(S)-P(M) 號表格。

(6) 如欲從多於一個賬戶轉出權益,請就每個賬戶分別提交一份第MPF(S)-P(M)號表格。

(7) 如欲在現職期間從你的供款賬戶轉出權益,請填寫第MPF(S)-P(P)號表格。

(8) 每一個賬戶,除了由自願性供款所產生的權益或可根據原計劃管限規則選擇提取外,計劃成員應把賬戶內的所有權益整筆轉移。

(9) 為免被第三者填上不正確的資料,請勿在空白的表格上簽署。在新受託人收到已填妥的第 MPF(S)- P(M)號表格後,之前由受託人採取的行政步驟未必能夠撤銷。

(10) 若在第 MPF(S)-P(M)號表格上提供的任何資料包括簽署)不正確或不完整,受託人可能無法處理你的權益轉移要求。

(11) 有關選擇計劃時各項考慮因素及強積金投資的潛在風險,請參閱強制性公積金計劃管理局(「積金局」)網站(www.mpfa.org.hk)的相關宣傳刊物。

(12) 新計劃的要約文件載有該計劃的資料,這些資料將有助你決定是否把權益轉移至該計劃。如欲查詢賬戶詳情及個別計劃或基金的資料,請聯絡相關受託人。

(13) 如欲就你的權益轉移申請作出查詢或尋求協助,請聯絡你的原受託人或新受託人。有關權益轉移的一般查詢,可聯絡積金局(電郵地址:mpfa@ mpfa.org.hk 或熱線電話:2918 0102)。

(14) 請填妥載於第 1 頁至第 3 頁的第 MPF(S)- P(M)號表格,並提交該表格予新受託人。

~完~

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Member Hotline 成員熱線: 2200 6288

MPF

第 MPF(S) - P(M)號表格

請注意:
- 請用**正楷**填寫本表格。
- 填報本申請表前，請先細讀第 i 頁之計劃成員轉移權益須知及第五頁之填 報須知。
- 請於 "*" 項目刪去不適用者。
- 請在不適用處填上「不適用」。

計劃成員資金轉移申請表
（ 適用於自僱人士、 個人賬戶持有人或終止受僱的僱員）
《強制性公積金計劃（一般）規例》（第 485A 章）第 145、146、147 、148 及 149 條

你就此項轉移申請提供的個人資料，將用作處理你的轉移申請。你提供的個人資料可能會為該目的而轉交相關受託人、相關服務提供者，以及政府或規管機構，包括強制性公積金計劃管理局「積金局」。

第 I 部 – 計劃成員資料

(1) 姓名：（與你的香港身分證上的姓名相同[註1]）
(a) 姓氏：
(b) 名字：

(2) 身分證明：
(a) 香港身分證號碼：
(b) 護照號碼：
（本欄*僅供*沒有香港身分證的計劃成員填寫）

(3) 聯絡資料：
(a) 住宅/日間聯絡電話號碼：
(b) 手提電話號碼：
(c) 電郵地址（如有）：

(4) 通訊地址：

* *香港 / 九龍 / 新界*	地區 / 國家（如非香港地區）

街道	街道號碼	屋邨

大廈	座	樓層	室

第 II 部 –轉移資料

(5) **原計劃的強積 金賬戶資料：**
原受託人名稱[註2]：
原計劃名稱[註2]：
強積金賬戶類別 （請選擇以下其中一個賬戶，並於適當方格內填上 ✓ 號）：
❑ 個人賬戶 *或* ❑ 供款賬戶
計劃成員賬戶號碼[註2]：

(6) (a) 個人賬戶詳情 ***(適用於個人賬戶持有人)：***
計劃編號[註2]：
(本欄 *僅供* 選擇轉移至友邦強積金計劃的成員填 寫)

(b) 以往受僱詳情***(適用於僱員在終止受僱後欲把供款賬戶內的權益轉出)***:
前任僱主名稱（*如有*）
僱主識別號碼[註2及3]：

(7) 自僱人士身份詳情 ***（只適用於自僱人士）***
請於適當方格內填上 ✓ 號，表明申請轉移的原因
❑ 終止自僱， 生效日期是：*(年/月/日)*
❑ 本人將會維持自僱，並把本人的權益轉移至第 III (8) 部所述的另一個計劃。本人向原計劃供款的最後日期是：*(年/月/日)*

第 III 部 –轉移選擇

(8) **新計劃的強積金賬戶資料：**

本人選擇把在第 II(5) 部所述賬戶內由強制性供款所產生的權益轉移至以下賬戶(請選擇(a)，(b)，(c)(1) 或(c)(2)，並於適當方格內填上✓ 號)

❑ (a) **轉移至本人新僱主就本人開立的供款賬戶**

新受託人名稱[註4]： ❑友邦(信託)有限公司
❑其它(請註明)：_____

新計劃名稱[註4]: ❑友邦強積金優選計劃
❑其它(請註明)：_____

計劃成員賬戶號碼[註4]：_____

新僱主名稱：_____

僱主識別號碼[註3及4]_____

❑ (b) **轉移至本人新計劃內的指定賬戶**

新受託人名稱[註4]： ❑友邦(信託)有限公司
❑其它(請註明)：_____

新計劃名稱[註4]: ❑友邦強積金優選計劃
❑其它(請註明)：_____

計劃成員賬戶號碼[註4]：_____

計劃編號[註4] ：_____

(本欄 僅供 選擇轉移至友邦強積金計劃的成員填寫)

❑ (c)(1) **以個人賬戶形式保留在原計劃（如適用）並跟隨供款賬戶的投資選擇以作投資。**
本人確認已知悉第 II 部所載僱主供款賬戶之投資選擇(「供款賬戶投資選擇」)，並且選擇以供款賬戶投資選擇作為受託人**最新**成立之個人賬戶的投資選擇。*

❑ (c)(2) **以個人賬戶形式保留在原計劃（如適用）並投資於強積金預設投資策略。**本人選擇向受託人**最新**成立之個賬戶所作之供款及轉自其他計劃的權益均投資於強積金預設投資策略。*

*如轉移至現有個人賬戶，任何新供款及轉自其他計劃的權益均以該現有個人賬戶之投資選擇作投資。

請注意：1. 如轉移權益到同一集成信託計劃，除非僱主供款之部分或全部權益/基金單位可能會被贖回用以抵銷遣散費/長期服務金，否則成員持有之總權益/基金單位將 不會被贖 回，並會直接轉移到指定之賬戶繼續投資。
2. 如成員沒有作出選擇，其權益將會保留在現有計劃之個人賬戶內。向受託人最新成立之個人賬戶所作之供款及轉自其他計劃的權益均投資於強積金預設投資策略。如轉移至現有個人賬戶，任何新供款及轉自其他計劃的權益均以該現有個人賬戶之投資選擇作投資。

(9) 有關本人在第 II(5)部所述賬戶內的自願性供款[註5]（如有）的安排。 請選擇(a)或(b)，並於適當方格內填上✓號

(備註：如你沒有作出任何選擇，而賬戶內有由自願性供款產生的權益，則該等權益將以處理第 III(8)部所述權益的同樣式處理。 如你已在第 III(9)部作出選擇，而賬戶內並沒有該等權益，則有關選擇將不會獲處理。)

❑ (a) 與在第 III(8)部所述由強制性供款所產生的權益一併轉移

❑ (b) 按照原計劃的管限規則 提取權益

付款方式 *(請在適當方格內填上 ✓ 號)*：

(i) ❑ 支票付款

(ii) ❑ 直接存入 只以計劃成員 名義 開立的 銀行 賬戶（ 不適用 於以第 三者 名義 開立的 銀行 賬戶）。**這項 選擇 只適用於有提 供此項服務的受託人， 而銀行可能會因此收取費用。 詳情請向原受託人查詢。)**

銀行賬戶持有人姓名：_____

銀行名稱：_____

銀行賬戶號碼：_____

第 IV 部– 終止沒有剩餘款項的強積金賬戶（如適用）

(10) 本人謹此指示原受託人在把本人於第 II(5)部所述的強積金成員賬戶內的所有權益轉移至新受託人後，以及在該賬戶內並無剩餘款項的 情況下，終止該強積金成員賬戶。

第 V 部 – 授權及聲明

(11) 本人同意，新受託人及積金局可為處理本人的轉移申請，向相關受託人及相關服務提供者披露本人就此項轉移申請提供的資料，或使該等機構 / 人士能夠取覽或披露該等資料。

(12) 本人聲明：

(a) 本人已閱讀及明白《計劃成員轉移強積金累算權益(權益)須知》及註釋的內容；

及 (b) 盡本人所知所信，本表格所提供的資料均屬正確無訛且無缺漏。

(13) 我確認我已閱讀、明白及同意 友邦（信託）有限公司（「友邦信託」）的個人資料收集聲明（「該聲明」）。
我聲明及同意在本申請所載或友邦信託不時以任何方法收集、獲得、編製或持有的任何關於我的個人資料及關於我的帳戶或投資的其他資料，可根據該聲明收集及使用。我知悉及同意就該聲明所述目的及向有關各方轉移我的個人資料至香港境內或境外各方。該聲明符合相關守則及法規的最新版本可於此下載：https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAT-PICS-Traditional-Chinese.pdf，及可向友邦信託索取。

有關轉移權益至友邦強積金計劃之資訊 / 意見

(14) **本人聲明：(請選擇(a) 或 (b) ，並於適當方格內填上✓號；如果沒有選擇，我們將假設閣下未獲任何註冊強積金中介人邀請、誘使或建議。)**

❑ (a) 本人未獲任何註冊強積金中介人邀請、誘使或建議轉移至友邦強積金計劃。

或

❑ (b) 本人獲註冊強積金中介人邀請、誘使或建議轉移至友邦強積金計劃。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。本人確認已收妥及閱讀新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)、主事中介人及附屬中介人資料及成員資料冊/退休樂單張/休悠樂單張及「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。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新計劃，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了解有關詳情。 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。本人明白從原受託人轉移至新受託人過程 需時，過程中權益將不會作任何投資。本人聲明已完全明白所提供及討論之資料，包括有關轉移權益至友邦強積金計劃的意見之理據。向本人提供的意見乃基於以下理據：

（請於適當方格內填上✓號）

❑ 計劃及基金選擇 ❑ 基金管理費 ❑ 成員服務

❑ 其他，請註明：

本人謹此確認在銷售過程中，並無涉及：(i) 任何就新計劃/新計劃內成分基金優於本人正參與/投資的計劃/基金之聲 言；(ii) 任何與選擇特定成分基金相關的意見、邀約或誘使。本人的註冊強積金中介人已告知本人若不選擇任何成分基金，供款(包括轉入的款項)便會自動按強積金預設投資策略進行投資。本人的註冊強積金中介人已向本人解釋強積金預設投資策略的特點，如自動降低風險及設有收費管控。

需要特別照顧的客戶

只有你獲註冊強積金中介人邀請、誘使或建議參加友邦強積金計劃，本部分始適用。

(15) 根據《強制性公積金計劃條例》第 34ZL 條，本人聲明：**(請選擇(a) 或 (b) ，並於適當方格內填上✓號)**

❑ (a) 本人並非視障或有其他障礙及/或本人的教育程度並非為小學或以下，本人能夠自行作出重要決定*。

或

❑ (b) 本人因視障或其他障礙及/或本人的教育程度為小學或以下，本人無法自行作出重要決定* **(請於適當方格內填上✓號)**

❑ 本人不願意銷售過程由見證人陪同。 **或**

❑ 本人願意銷售過程由以下見證人陪同：**(請於適當方格內填上✓號)**

❑ 本人的同伴。 **或** ❑ 另一名中介人或員工(即第三者)。

見證人姓名	見證人簽署	日期（年 / 月 / 日）

* 根據強積金法例的定義，指(i) 選擇一項特定成分基金；(ii) 進行涉及轉移一項保證基金的權益轉移；(iii) 提早從強積金制度中提取權益；或 (iv)向一個/項特定註冊計劃/成分基金作自願性供款。

計劃成員簽署[註6] 日期（年/月/日）

For Intermediary Use

Intermediary/ Agent Code : ⌊⌊⌊⌊⌊⌊ **Agency Code :** ⌊⌊⌊⌊⌊⌊

Intermediary/ Agent Name : ⌊⌊⌊⌊⌊⌊⌊⌊⌊⌊ **Staff code/ Name :** ⌊⌊⌊⌊⌊⌊⌊⌊⌊⌊ **Received date & time :** ccyy / mm / dd

By completing the intermediary information, I confirm that I have witnessed the signature and verified the original HKID card/ Passport copy of the member as stated on the document attached to this transfer application (if applicable).

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)
Postal Address 8/F, AIA Financial Centre, 712 Prince Edward Road East,
郵寄地址: Kowloon, Hong Kong
香港九龍太子道東712 號友邦九龍金融中心8 樓
Customer Service Centre 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
客戶服務中心: 香港北角電器道 183 號友邦廣場 12 樓
Member Hotline 成員熱線: 2200 6288

MPF

簽名核實證明文件
(適用於經中介人遞交之轉移指示及/或設立新個人賬戶申請)

計劃名稱 : 友邦強積金優選計劃

聲明

本人確認在此提供的香港身份證/護照是原件的副本，而簽名是本人的簽名。本人要求任何本人作為強制性公積金計劃(強積金)成員的受託人處理與這信件一同遞交的轉移申請。本人同意及明白在此提供的簽名將僅用於目前的轉移申請，而並不會更改任何本人過去曾經提供強積金受託人的簽名記錄。

本人亦確認及同意強積金受託人以以下香港身份證/護照副本為本人設立新的個人賬戶(如適用)。

計劃成員簽署

請在此貼上香港身份證/護照副本

計劃成員資金轉移申請表 [第 MPF(S)-P(M) 號表格] 填報須知

(1) 如你**沒有**香港身分證，請填上你在護照上的姓名。

(2) 如你沒有提供原受託人名稱、原計劃名稱、原計劃成員帳戶號碼、強積金帳戶類別、前 任僱主名稱或僱主識別號碼，或所提供的資料有誤，則此項轉移要求或不獲處理。你可 透過以下途徑獲取有關資料：

(a) 查閱成員證明書、接納通知或參與通知；或

(b) 查閱周年權益報表或受託人提供的其他報表；或 (c) 受託人提供的成員查詢服務。如有疑問，請聯絡你的原受託人或僱主。

(3) 僱主識別號碼即受託人為有關僱主編配的號碼。受託人或會使用不同名稱來設定此號碼（例如帳戶編號、僱主編號、合約編號、強積金客戶編號、參與計劃編號、計劃編號、附屬計劃編號）。你可查閱受託人發出的報表或透過受託人提供的成員查詢服務獲取該 號碼。如有疑問，請聯絡你的受託人或僱主。

(4) 如你沒有提供新受託人名稱、新計劃名稱或新計劃成員帳戶號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可透過以下途徑獲取有關資料：

(a) 查閱成員證明書、接納通知或參與通知；或

(b) 查閱周年權益報表或受託人提供的其他報表；或

(c) 受託人提供的成員查詢服務。

不過，如你最近才參加計劃，並未獲悉新的成員帳戶號碼，則可留空此項。如有疑問，請聯絡你的新受託人。

(5) 計劃成員可在原受託人向計劃成員發出的周年權益報表上，獲知其現有強積金帳戶內是 否有由自願性供款所產生的權益。計劃成員亦可透過受託人提供的成員查詢服務查核 這項資料。如有疑問，請聯絡你的原受託人。

(6) 你的簽署必須與你之前給予原受託人的簽署式樣相同。請注意，若本表格上的簽署與你之前給予原受託人的簽署式樣不符，有關轉移或不獲處理。如有疑問，請聯絡你的原受託人。

~完~

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)
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Customer Service Centre 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
客戶服務中心: 香港北角電器道 183 號友邦廣場 12 樓
Member Hotline 成員熱線: 2200 6288

Appendix 1

NOTES TO TRANSFER OF MPF ACCRUED BENEFITS (BENEFITS) BY SCHEME MEMBER
(For self-employed person, personal account holder or employee ceasing employment)

Sections 145, 146, 147, 148 and 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)

Please read the following **important notes** before completing this Form.

(1) ***Definition of terms:***

(a) "Contribution account" - an account in an MPF registered scheme (scheme) which is mainly used to receive MPF contributions (both employer and employee portions) made by an employer for an employee and on behalf of the employee or by a self- employed person.

(b) "Personal account" - an account in a scheme which is mainly used to receive the benefits transferred from another contribution or personal account.

(c) "Original trustee" (also known as "transferor trustee" in the Mandatory Provident Fund Schemes (General) Regulation ("the Regulation")) - the trustee of a scheme from which your benefits are to be transferred.

(d) "New trustee" (also known as "transferee trustee" in the Regulation) - the trustee of a scheme to which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same scheme or to another scheme under the same trustee, the new trustee on Form MPF(S)-P(M) will be the same as the original trustee.

(e) "Original scheme"- the scheme from which your benefits are to be transferred.

(f) "New scheme"- the scheme to which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same scheme, the new scheme on Form MPF(S)-P(M) will be the same as the original scheme.

(2) *If you are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that guaranteed fund may result in some or all of the guarantee conditions not being satisfied; thus affecting your entitlement to the guarantee. Please check the offering document of the original scheme or consult your original trustee for details.*

(3) *If you wish to transfer your benefits from one scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy ("DIS") if you either (a) do not give or have not given any investment instructions for the account to your new trustee or (b) have given investment instructions for the account to invest benefits according to the DIS. Please approach your new trustee to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in the new scheme, please also approach the new trustee.*

(4) *If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the DIS of the scheme, you should be aware that the de-risking mechanism of the DIS starts at the age of 50. If the annual de-risking of your investment in the DIS and your transfer request take place at around the same time, the trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant trustee(s) if you wish to know the details of how the trustee(s) will handle these transactions.*

(5) *Please ensure that you have a personal account or a contribution account in the new scheme. Otherwise, you have to enrol in that scheme before you submit Form MPF(S)-P(M) to the new trustee.*

(6) *If you wish to transfer-out the benefits from more than one accounts, you should submit a separate Form MPF(S)- P(M) for each of those accounts.*

(7) *If you wish to transfer-out the benefits from your contribution account during employment, you should complete Form MPF(S)-P(P).*

(8) *For each account, a scheme member should transfer the entirety of his benefits therein in a lump sum except the part of the benefits derived from voluntary contributions which the scheme member may elect to withdraw in accordance with the governing rules of the original scheme.*

(9) *In order to prevent a third party from filling in incorrect information, please* ***DO NOT sign on a blank form****. After the completed Form MPF(S)-P(M) has been received by the new trustee, the administration procedures taken by the trustees may not be reversible.*

(10) *If any information provided on Form MPF(S)-P(M) (including the signature) is incorrect or incomplete, the trustees may not be able to process your benefit transfer request.*

(11) *Please refer to the publication of the Mandatory Provident Fund Schemes Authority ("MPFA") available from the MPFA website (www.mpfa.org.hk) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment.*

(12) *Information about the new scheme is set out in the offering document of that scheme. This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the relevant trustee for enquiries about account details and information on specific schemes or funds.*

(13) *If you wish to make enquiries or seek assistance in relation to your election to transfer benefit, please contact your original trustee or new trustee. For general enquiries regarding benefit transfer, you may contact the MPFA via e-mail: mpfa@mpfa.org.hk or hotline: 2918 0102.*

(14) *Please complete Form MPF(S)-P(M) at Page 1 to Page 3 and submit it to the new trustee after completion.*

~END~

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)

Postal Address 郵寄地址:	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
Customer Service Centre 客戶服務中心:	12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong 香港北角電器道 183 號友邦廣場 12 樓
Member Hotline 成員熱線:	2200 6288

MPF

FORM MPF(S)-P(M)

Please note :
- Please use **BLOCK LETTERS** for completion of this Form.
- Please read the Notes to Transfer of Benefits by Scheme Member on page i, and Explanatory Notes on page 5 carefully before completing this Form.
- Delete as inappropriate where marked with "*".

SCHEME MEMBER'S REQUEST FOR FUND TRANSFER FORM

(For self-employed person, personal account holder or employee ceasing employment)

Sections 145, 146, 147, 148 and 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)

The personal data to be supplied in support of this election of transfer are to be used for processing your election of transfer. The personal data you supply may, for such purpose, be transferred to the trustee(s) concerned, the relevant service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority ("MPFA").

SECTION I – SCHEME MEMBER'S DETAILS

(1) Name: *(as shown on your Hong Kong Identity (HKID) Card Note 1)*
- (a) Surname: _____
- (b) Other Name: _____

(2) Identification:
- (a) HKID Card number: _____
- (b) Passport number: _____ (*ONLY* for scheme member without HKID Card)

(3) Contact details:
- (a) Home / Daytime phone number: _____
- (b) Mobile phone number: _____
- (c) Email address *(if any)*: _____

(4) Correspondence address:

Flat/Room	Floor	Block	Building

Estate	Street no.	Street

District / country (if not Hong Kong)	* Hong Kong / Kowloon / New Territories

SECTION II – TRANSFER INFORMATION

(5) MPF account information in the original scheme:

Name of original trustee Note 2: _____

Name of original scheme Note 2: _____

Type of MPF account *(please select ONE of the following accounts and ✓ as appropriate):*

❑ Personal account *OR* ❑ Contribution account

Scheme member's account number Note 2: _____

(6) (a) Details of Personal Account ***(applicable for Personal Account Holder)*** :

Plan Number Note 2 : _____

(Only for member elects to transfer into AIA MPF Scheme)

(b) Details of Former Employment ***(applicable for employee who wishes to transfer-out the benefits from a contribution account after cessation of employment)*:**

Name of Former Employer *(if any)* : _____

Employer's Identification Number Note 2 & 3: _____

(7) Details of self-employed status ***(applicable for self-employed person only)***

Please indicate your reason of transfer and ✓ as appropriate:

❑ Cessation of self-employment, with effect from : _____ *(yyyy/mm/dd)*

❑ I will remain in self-employment and my benefits will be transferred to another scheme stated in section III(8).
Contributions to the original scheme should be paid up to : _____ *(yyyy/mm/dd)*

- Please insert "N.A." if not applicable.

SECTION III – TRANSFER OPTIONS

(8) MPF account information in the new scheme:
I elect to transfer the benefits derived from the mandatory contributions in my account stated in section II(5) to the following account

(Please select option (a),(b) ,(c)(1) OR (c)(2) and ✓ as appropriate):

❑ (a) **To my contribution account with my new employer**

Name of New Trustee Note 4 : ❑ AIA Company (Trustee) Limited
❑ Others (please specify) : _____

Name of New Scheme Note 4 : ❑ AIA MPF - Prime Value Choice
❑ Others (please specify) : _____

Scheme Member's Account Number Note 4 : _____

Name of New Employer : _____

Employer's Identification Number Note 3 & 4 : _____

❑ (b) **To my designated account in the new scheme**

Name of New Trustee Note 4 : ❑ AIA Company (Trustee) Limited
❑ Others (please specify) : _____

Name of New Scheme Note 4 : ❑ AIA MPF - Prime Value Choice
❑ Others (please specify) : _____

Scheme Member's Account Number Note 4 : _____

Plan Number Note 4 : _____

(Only for member elects to transfer into AIA MPF Scheme)

❑ (c)(1) **Retained in the original scheme as Personal Account (where applicable) and invested in the same manner as in my Contribution Account .**
I confirm that I am fully aware of the investment mandate of my Contribution Account stated in section II ("CA Investment Mandate") and I elect to adopt the CA Investment Mandate to my Personal Account **newly** set up by the Trustee.*

❑ (c)(2) **Retained in the original scheme as Personal Account (where applicable) and invested in MPF Default Investment Strategy.**
I confirm the contributions and accrued benefits transferred from another scheme(s) to my Personal Account newly set up by the Trustee will be invested in accordance with the MPF Default Investment Strategy.*

* For a transfer to an existing Personal Account, any new contributions and accrued benefits transferred from another scheme(s) will be invested in accordance with the investment allocation of the existing Personal Account.

Please note: 1. For a transfer of accrued benefits within the same Master Trust Scheme, unless there is an offset of Severance Payment / Long Service Payment in which part or whole of fund holding attributable to employer's contribution may be redeemed, Member's total fund holding will not be redeemed and will be directly transferred to the designated account to continue to invest.

2. If no transfer option is selected, the accrued benefits will be retained in the Personal Account of the current scheme. Contributions and accrued benefits transferred from another scheme(s) to my Personal Account newly set up by the Trustee will be invested in accordance with the MPF Default Investment Strategy. For a transfer to an existing Personal Account, any new contributions and accrued benefits transferred from another scheme(s) will be invested in accordance with the investment allocation of the existing Personal Account.

(9) Arrangement of my voluntary contributions Note 5 (if any) in my account stated in section II(5) .

Please select option (a) OR (b) and ✓ as appropriate.

(Remarks: If you do not select any options but there are benefits derived from voluntary contributions, those benefits will be handled in the same way as those stated in section III(8). If there are no such benefits in your account and you have made an election in section III(9), the selected option will not be processed.)

❑ (a) Transferred together with the accrued benefits derived from the mandatory contributions as in section III(8).

❑ (b) Withdrawn in accordance with the governing rules of the original scheme.

Method of payment *(please ✓ as appropriate)*:

(i) ❑ By cheque

(ii) ❑ By depositing directly in a bank account under the name of scheme member only (a bank account under the name of a third party is not applicable). **(This option is applicable only to trustees who provide such services and there may be bank charges involved. Please check with the original trustee for details.)**

Name of bank account holder : _____

Name of bank : _____

Bank account number : _____

SECTION IV – TERMINATION OF MPF ACCOUNT WITH NO RESIDUAL BALANCE (IF APPLICABLE)

(10) I hereby give the original trustee an instruction to terminate my relevant MPF member account as referred to in section II(5) upon transfer of the full benefits to the new trustee and there is no residual balance in the said account.

SECTION V – AUTHORISATION AND DECLARATION

(11) I hereby give consent to the new trustee and the MPFA to disclose information supplied by me in support of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

(12) I declare that:

(a) I have read and understood the Notes to Transfer of MPF Accrued Benefits (Benefits) by Scheme Member and the Explanatory Notes; and

(b) to the best of my knowledge and belief, the information given in this Form is correct and complete.

(13) I confirm that I have read, understood and agreed to the Personal Information Collection Statement of AIA Company (Trustee) Limited ("AIA Trustee") (the "PICS"). I declare and agree that any personal data and other information relating to me or my account(s) or investment(s) contained in this application or collected, obtained, compiled or held by AIA Trustee by any means from time to time may be collected and utilized in accordance with the PICS. I acknowledge and consent to, and confirm that we have obtained our employees' consent to (if applicable), the transfer of my personal data to parties within or outside Hong Kong for the purposes and to the transferees as set out in the PICS. The updated version of the PICS which complies with the relevant rules and regulations is available for download: https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAT-PICS-English.pdf, and is also available upon request.

Information / Advice relating to transfer of benefits to the AIA MPF Scheme

(14) **I declare that: (please select (a) OR (b) and ✓ as appropriate; if no selection is made, we will assume that you HAVE NOT been invited, induced or advised by any registered MPF intermediaries)**

❑ (a) I HAVE NOT been invited, induced or advised by any registered MPF intermediaries to transfer to the AIA MPF Scheme.

OR

☐ (b) I have been invited, induced or advised by one or more registered MPF intermediaries to transfer to 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. 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 and Member's Guide/ Happy Retirement Savings Programme leaflet/ AIA MPF Personal Account leaflet applicable to the New 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. 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 New 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).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 trustee to new trustee, there will be a time lag during which the benefits will not be invested. I declare that I fully understand the information provided and discussed, including the rationale underlying the advice relating to transfer of benefits to the AIA MPF Scheme. The advice given to me is based on the following rationale(s):

(please ✓ the appropriate box(es))

❑ Schemes and fund choices ❑ Fund management fees ❑ Member services

❑ Other, please specify: _____

I hereby confirm that the sales process does not involve: (i) any claims that the New Scheme/constituent fund under the New Scheme is preferred over the scheme/fund I participated/invested in; (ii) any advice, invitation or inducement relating to choosing a particular constituent fund. I have been informed by my registered MPF intermediary that if no constituent fund is selected, all contributions (including transfer-in monies) will be automatically invested according to the MPF Default Investment Strategy (the "DIS"). My registered MPF intermediary has explained to me the key features of the DIS, such as its automatic de-risking features and fee controls.

Clients with special needs

This part is applicable only if you have been invited, induced or advised by any registered MPF intermediaries to transfer to the AIA MPF Scheme.

(15) Pursuant to section 34ZL of the Mandatory Provident Fund Schemes Ordinance, I declare that: **(please select (a) OR (b) and ✓ as appropriate)**

❑ (a) I AM NOT visually or otherwise impaired and/or my education level IS NOT primary or below such that I can make a key decision* independently.

OR

❑ (b) I am visually or otherwise impaired and/or my education level is primary or below such that I cannot make a key decision* independently, and (please ✓ the appropriate box)

❑ I would not like to be accompanied by a witness during the sales process.

OR

❑ I would like to be accompanied by the following witness during the sales process: **(please ✓ the appropriate box)**

❑ my companion. **OR** ❑another intermediary or member of staff (i.e. a third party).

Name of witness	Signature of witness	Date (yyyy/mm/dd)

* As defined in the MPF legislation, it refers to: (i) choosing a particular constituent fund; (ii) making a transfer that would involve a transfer out of a guaranteed fund; (iii) making an early withdrawal of accrued benefits from the MPF system; or (iv) making voluntary contributions into a particular registered

Signature of the Scheme Member Note 6

Date (yyyy/mm/dd)

For Intermediary Use

Intermediary/ Agent Code : |_|_|_|_|_|_| **Agency Code** |_|_|_|_|_|

Intermediary/ Agent Name : _____ **Staff code/ Name :** _____ **Received date & time :** _____ yyyy / mm / dd

By completing the intermediary information, I confirm that I have witnessed the signature and verified the original HKID card/ Passport copy of the member as stated on the document attached to this transfer application (if applicable).

To 致: AIA International Limited 友邦保險(國際)有限公司 **MPF**

(Incorporated in Bermuda with limited liability 於百慕達註冊成立之有限公司)

Postal Address 郵寄地址:	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
Customer Service Centre 客戶服務中心: Member Hotline 成員熱線:	12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong 香港北角電器道 183 號友邦廣場 12 樓 2200 6288

SIGNATURE VERIFICATION

(Applicable for transfer request submitted through intermediaries and/or new Personal Account set up)

Scheme Name : AIA MPF – Prime Value Choice

Declaration

I confirm that the Hong Kong Identity Card/Passport provided is a copy of the original and my signature is my own signature. I request the trustee of any Mandatory Provident Fund ("MPF") schemes in which I am a member to process the transfer application(s) submitted together with this document. I agree and understand that my signature provided here would be used for the current application(s) only and would not change any of my signature record which I have provided to the MPF trustee previously.

I also confirm and agree the MPF trustee to use this Hong Kong Identity Card/Passport copy for setting up my new Personal Account (if applicable).

Signature of the Scheme Member

Please paste your HKID Card / Passport copy here

Explanatory Notes on
Scheme Member's Request for Fund Transfer Form [Form MPF(S)-P(M)]

(1) If you do NOT possess a HKID Card, please fill in your name as shown on your passport.

(2) The transfer request may not be processed if the name of the original trustee, the name of the original scheme, your scheme member's account number in the original scheme, type of MPF account, the name of your former employer or the employer's identification number is not provided or is incorrect. This information can be found:

(a) in your membership certificate, notice of acceptance, or notice of participation; or

(b) in your annual benefit statement, or other statements provided by the trustee; or

(c) through the member enquiry facilities available from the trustee.

If you are in doubt, please contact your original trustee or your employer.

(3) The employer's identification number is the number assigned by the trustee to the employer concerned. Trustees may use different names for this number (e.g. account number, company code, contract number, employer account number, employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). The number can be found in the statements issued by the trustees or through the member enquiry facilities available from the trustee. If you are in doubt, please contact your trustee or your employer.

(4) The transfer request may not be processed if the name of the new trustee, the name of the new scheme or your scheme member's account number in the new scheme is not provided or is incorrect. The information can be found:

(a) in your membership certificate, notice of acceptance, or notice of participation; or

(b) in your annual benefit statement, or other statements provided by the trustee; or

(c) through the member enquiry facilities available from the trustee.

You may, however, leave the scheme member's account number blank if you have recently enrolled in the scheme and have not been notified of the new account number. If you are in doubt, please contact your new trustee.

(5) A scheme member can check whether his existing MPF account contains any benefits derived from voluntary contributions from his annual benefit statement issued by the original trustee to the scheme member. The scheme member can also check this information through the member enquiry facilities available from the trustee. If you are in doubt, please contact your original trustee.

(6) The signature must be the same as your specimen signature previously given to your original trustee. Please note that the transfer may not be processed if the signature provided in this Form does not match your specimen signature previously given to your original trustee. If you are in doubt, please contact your original trustee.

~END~

附件 2

MPF

第 MPF(S) - P(C)號表格

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)
Postal Address 8/F, AIA Financial Centre, 712 Prince Edward Road East, Kowloon, Hong Kong
郵寄地址: 香港九龍太子道東712 號友邦九龍金融中心8 樓
Customer Service Centre 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
客戶服務中心: 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

計劃成員整合個人賬戶申請表

（適用於整合多個個人賬戶至一個賬戶）

《強制性公積金計劃（一般）規例》（第 485A 章）第 149 條

填寫本表格前，請先閱讀下列**重要資料**：

填寫表格

(a) 本表格適用於整合多個個人賬戶至一個你選擇的賬戶。

(b) 你必須同時填寫本表格（一頁）及附錄（一頁），並把表格及附錄（合共兩頁）提交予你選擇的受託人，以及保留副本作日後參考。若你提供的任何資料（包括簽署）不正確或不完整，受託人可能無法迅速處理你的申請。

(c) 你就此項轉移申請提供的個人資料，將用作處理你整合賬戶的申請。你提供的個人資料可能會為該目的而轉交相關受託人、相關服務提供者，以及政府或規管機構，包括強制性公積金計劃管理局（「積金局」）。

(d) 「整合」多個個人賬戶—指從多個強積金個人賬戶轉移全部強積金累算權益（權益）至你選擇的強積金註冊計劃(計劃)的一個賬戶內。

(e) 「供款賬戶」—指計劃下主要用以接收僱主為僱員所作出或代表僱員所作出的強積金供款（包括僱主及僱員部分）的賬戶，或接收自僱人士所作出的強積金供款的賬戶。

(f) 「個人賬戶」—指強積金計劃下主要用以接收由其他供款或個人賬戶轉入的權益的賬戶。

整合前注意事項

(g) 請確保你在你選擇的計劃已開立個人賬戶或供款賬戶，以接收及整合你於附錄所指定擬轉移的個人賬戶內的權益。否則，你在提交本表格及附錄之時或在此之前，須先行向你選擇的受託人提交成員參加計劃表格。有關開立賬戶的程序及所需文件，請向你選擇的受託人查詢。

(h) 你藉本表格整合的每個個人賬戶內的所有權益，包括由自願性供款所產生的權益（如有的話，及在符合計劃管限規則的情況下），將一筆過轉移至你選擇的計劃。

(i) 為免被第三者填上不正確的資料，請勿在空白的表格上簽署。在你選擇的受託人收到已填妥的表格及附錄後，之前由受託人採取的行政步驟未必能夠撤銷。

(j) 如你現時投資於強積金保證基金，從該保證基金轉出權益，可能會導致你不符合部分或所有保證條件，以致影響你享有保證的資格。詳情請查閱計劃的要約文件，或向你的受託人查詢。

(k) 如欲把權益從一個計劃轉移至另一個計劃，請留意轉入賬戶的權益將會如何投資。一般而言，如你(i)沒有或尚未就有關賬戶向你選擇的計劃的受託人給予任何投資指示；或(ii)已就有關賬戶給予投資指示，要求把權益按照預設投資策略投資，則轉入該賬戶的權益將按照預設投資策略投資。如有需要，請向你選擇的計劃的受託人查詢詳情。如欲就你選擇計劃的賬戶更改或給予投資指示，亦請聯絡你選擇的計劃的受託人。

(l) 如你已年滿或快將年滿 50 歲，而現時你的權益是按照計劃的預設投資策略投資，請留意預設投資策略的降低投資風險機制，會由計劃成員年滿 50 歲開始運作。如計劃的受託人在預設投資策略下按年降低你的投資風險的時間，與接獲你的轉移權益申請的時間相當接近，該計劃的受託人將根據其運作程序及在符合《強制性公積金計劃條例》規定的情況下，訂定處理降低風險及轉移權益的次序。如欲瞭解受託人如何處理該等交易，請向相關受託人查詢詳情。

(m) 有關選擇計劃時各項考慮因素及強積金投資的潛在風險，請參閱積金局網站（www.mpfa.org.hk）的相關宣傳刊物。

查詢

(n) 強積金計劃的要約文件載有該計劃的資料，這些資料將有助你決定是否把權益轉移至該計劃。如欲查詢賬戶詳情及個別計劃或基金的資料，請聯絡相關受託人。

(o) 有關整合賬戶的一般查詢，可聯絡相關受託人或積金局（電郵地址：mpfa@mpfa.org.hk 或熱線電話：2918 0102）。

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)

Postal Address 8/F, AIA Financial Centre, 712 Prince Edward Road East,
郵寄地址: Kowloon, Hong Kong
香港九龍太子道東712號友邦九龍金融中心8樓
Customer Service Centre 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
客戶服務中心: 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

MP

第 MPF(S) - P(C)號表格

計劃成員整合個人賬戶申請表

（適用於整合多個個人賬戶至一個賬戶）
《強制性公積金計劃（一般）規例》（第485A章）第149條

第 I 部： 計劃成員資料

姓名 註1 （*與你的香港身份證上的姓名相同*）	姓氏：			
	名字：			
身份證明	香港身份證號碼：			
	護照號碼： （*本欄僅供沒有香港身份證的計劃成員填寫* ）			
聯絡資料	住宅/日間聯絡電話號碼:	手提電話號碼：		
	電郵地址（如有）：			
通訊地址	香港 / 九龍 / 新界 （*請刪去不適用者*）	地區 / 國家名稱（如非香港地區）		
	街道	街道號碼	屋邨	
	大廈	座	樓層	室

第 II 部： 我選擇的計劃

本人選擇把在附錄中指定的個人帳戶內的所有強積金累算權益（權益）轉移至以下我選擇的計劃註2**:**

本人選擇的計劃名稱	☐ 友邦強積金優選計劃 ☐ 其它(請註明)：_____
賬戶類別 （只可選擇一項，請於適當方格內填上 ✓號 ）	☐ 個人帳戶 **或** ☐ 供款帳戶 （僱主識別號碼註3：）
計劃成員賬戶號碼 註4	

第 III 部： 授權及聲明

(a) 本人同意，本人選擇的計劃的受託人及積金局可為處理本人的轉移申請，向相關受託人及相關服務提供者披露本人就此項轉移申請提供的資料，或使該等機構 / 人士能夠取覽或披露該等資料。
(b) 本人謹此指示在附錄中指定的受託人，在把本人於附錄中指定的個人賬戶內的所有累算權益轉移至本人選擇的計劃後，以及在該等賬戶內並無剩餘款項的情況下，終止該等個人帳戶。
(c) 本人聲明，本人已閱讀及明白本表格第 1 頁的資料及註釋的內容，而盡本人所知所信，本表格及附錄所提供的資料均屬正確無訛且無缺漏。
(d) 我確認我已閱讀、明白及同意 友邦（信託）有限公司（「友邦信託」）的個人資料收集聲明（「該聲明」）。
我聲明及同意在本申請所載或友邦信託不時以任何方法收集、獲得、編製或持有的任何關於我的個人資料及關於我的帳戶或投資的其他資料，可根據該聲明收集及使用。我知悉及同意就該聲明所述目的及向有關各方轉移我的個人資料至香港境內或境外各方。該聲明符合相關守則及法規的最新版本可於此下載：https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAT-PICS-Traditional-Chinese.pdf，及可向友邦信託索取。

有關轉移權益至友邦強積金計劃之資訊 / 意見

(e) **本人聲明：(請選擇(a)或(b)，並於適當方格內填上✓號；如果沒有選擇，我們將假設閣下未獲任何註冊強積金中介人邀請、誘使或建議。)**
❑ (a) 本人未獲任何註冊強積金中介人邀請、誘使或建議轉移至友邦強積金計劃。
或
❑ (b) 本人獲註冊強積金中介人邀請、誘使或建議轉移至友邦強積金計劃。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。本人確認已收妥及閱讀新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)、主事中介人及附屬中介人資料及成員資料冊/退休樂單張/休悠樂單張及「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。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新計劃，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了解有關詳情。 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。本人明白從原受託人轉移至新受託人過程 需時，過程中權益將不會作任何投資。本人聲明已完全明白所提供及討論之資料，包括有關轉移權益至友邦強積金計劃的意見之理據。向本人提供的意見乃基於以下理據：
（請於適當方格內填上✓ 號）

❑計劃及基金選擇 ❑ 基金管理費 ❑ 成員服務 ❑ 其他，請註明：_____

本人謹此確認在銷售過程中，並無涉及：(i) 任何就新計劃/新計劃內成分基金優於本人正參與/投資的計劃/基金之聲 言；(ii) 任何與選擇特定成分基金相關的意見、邀約或誘使。本人的註冊強積金中介人已告知本人若不選擇任何成分基金，供款(包括轉入的款項)便會自動按強積金預設投資策略進行投資。本人的註冊強積金中介人已向本人解釋強積金預設投資策略的特點，如自動降低風險及設有收費管控。

需要特別照顧的客戶

只有你獲註冊強積金中介人邀請、誘使或建議參加友邦強積金計劃，本部分始適用。
(f) 根據《強制性公積金計劃條例》第34ZL條，本人聲明：**(請選擇(a)或(b)，並於適當方格內填上✓號)**
❑(a) 本人並非視障或有其他障礙及/或本人的教育程度並非為小學或以下，本人能夠自行作出重要決定*。 **或**
❑(b) 本人因視障或其他障礙及/或本人的教育程度為小學或以下，本人無法自行作出重要決定***(請於適當方格內填上✓號)**
❑本人不願意銷售過程由見證人陪同。 **或**
❑本人願意銷售過程由以下見證人陪同：**(請於適當方格內填上✓號)**
❑ 本人的同伴。 **或** ❑另一名中介人或員工(即第三者)。

見證人姓名 見證人簽署 日期（年 / 月 / 日）

* 根據強積金法例的定義，指(i) 選擇一項特定成分基金；(ii) 進行涉及轉移一項保證基金的權益轉移；(iii) 提早 從強積金制度中提取權益；或 (iv) 向一個/項特定註冊計劃/成分基金作自願性供款。

簽署註5	日期（*年 / 月 / 日*）

附錄： 本人選擇整合的個人帳戶列表		
請於下表選出你選擇整合的個人帳戶，並填寫計劃成員帳戶號碼[註5]：		
受託人名稱	**計劃名稱**	**計劃成員帳戶號碼**
友邦（信託）有限公司	友邦強積金優選計劃	
銀聯信託有限公司	AMTD 強積金計劃	
	BCT（強積金）行業計劃	
	BCT 積金之選	
	BCT 強積金策略計劃	
	宏利退休精選（強積金）計劃	
交通銀行信託有限公司	交通銀行愉盈退休強積金計劃	
東亞銀行（信託）有限公司	東亞（強積金）行業計劃	
	東亞（強積金）集成信託計劃	
	東亞（強積金）享惠計劃	
中銀國際英國保誠信託有限公司	中銀保誠簡易強積金計劃	
	我的強積金計劃	
中國人壽信託有限公司	中國人壽強積金集成信託計劃	
HSBC Provident Fund Trustee (Hong Kong) Limited	富達退休集成信託	
	海通 MPF 退休金	
	恒生強積金智選計劃	
	滙豐強積金智選計劃	
宏利公積金信託有限公司	宏利環球精選（強積金）計劃	
信安信託（亞洲）有限公司	信安強積金計劃 800 系列	
	信安強積金－易富之選	
	信安強積金－明智之選	
永明信託有限公司	永明彩虹強積金計劃	
萬通信託有限公司	萬全強制性公積金計劃	

上表列出截至 2023 年 11 月 29 日的受託人及計劃資料

For Intermediary Use	
	Intermediary/ Agent Code : ⌊_____⌋ **Agency Code :** ⌊_____⌋
	Intermediary/ Agent Name : ⌊_____⌋ **Staff code/ Name :** ⌊_____⌋ **Received date & time :** _____ yyyy / mm / dd

By completing the intermediary information, I confirm that I have witnessed the signature and verified the original HKID card/ Passport copy of the member as stated on the document attached to this transfer application (if applicable).

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)
Postal Address 8/F, AIA Financial Centre, 712 Prince Edward Road East,
郵寄地址: Kowloon, Hong Kong

香港九龍太子道東712 號友邦九龍金融中心8 樓
Customer Service Centre 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
客戶服務中心: 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

MPF

簽名核實證明文件

(適用於經中介人遞交之轉移指示及/或設立新個人賬戶申請)

計劃名稱 :友邦強積金優選計劃

聲明

本人確認在此提供的香港身份證/護照是原件的副本，而簽名是本人的簽名。本人要求任何本人作為強制性公積金 計劃(強積金)成員的受託人處理與這信件一同遞交的轉移申請。本人同意及明白在此提供的簽名將僅用於目前的轉移申 請，而並不會更改任何本人過去曾經提供強積金受託人的簽名記錄。

本人亦確認及同意強積金受託人以以下香港身份證/護照副本為本人設立新的個人賬戶(如適用)。

成員簽署

請 在 此 貼 上 香 港 身 份 證 / 護 照 副 本

註 釋

1. 如你沒有香港身份證 ， 請填寫你在護照上的姓名 。

2. 如你沒有提供你選擇的計劃的名稱或計劃成員賬戶號碼，或所提供的資料有誤，你整合個人賬戶的申請或不獲處理。你可查閱參與通知、成員證明書或接納通知（視乎情況而定）或周年權益報表獲取有關資料。如有疑問 ，請聯絡有關受託人。

   請注意，只有你在附錄中指定的個人賬戶才會整合。附錄內沒有指定的個人賬戶將維持不變。

3. 僱主識別號碼即受託人為有關僱主編配的號碼。受託人或會使用不同名稱來設定識別號碼（例如賬戶編號、僱主編號、合約編號、強積金客戶編號、參與計劃編號、計劃編號、附屬計劃編號）。你可查閱受託人發出的報表或透過受託人提供的成員查詢服務獲取該號碼。如有疑問，請聯絡你的受託人或僱主。

4. 如你最近才參加計劃，因而並未獲悉你的計劃成員賬戶號碼，則可留空此項。如有疑問，請聯絡相關受託人。

5. 在下列情況下，你要求整合附錄列明的某個個人賬戶的申請可能不獲處理：(a) 你沒有填寫該個人賬戶的計劃成員 賬戶號碼 ，或所填寫的號碼不正確；或 (b) 你在表格上的簽署與你之前給予該受託人的簽署式樣不符 。不過， 如其他個人賬戶的計劃成員賬戶號碼及簽名式樣均正確，整合該等賬戶的申請將獲處理。

   你可查閱參與通知、成員證明書或接納通知（視乎情況而定）或周年權益報表獲取你的計劃成員賬戶號碼。如有疑問 ，請聯絡有關受託人 。

Appendix 2

MPF

FORM MPF(S) - P(C)

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)
Postal Address 郵寄地址: 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
Customer Service Centre 客戶服務中心: 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

SCHEME MEMBER'S REQUEST FOR ACCOUNT CONSOLIDATION FORM (for consolidating multiple personal accounts into one account)

Section 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap. 485A)

Please read the following **important notes** before completing this Form:

Filling In This Form

(a) This Form is to be used for consolidating multiple personal accounts into one account of your election.

(b) You must fill in both this Form (1 page) and the Appendix (1 page) and submit them (2 pages in total) to your elected trustee and keep a copy for your future reference. If any information provided, including your signature, is incorrect or incomplete, the trustees may not be able to process your request promptly.

(c) The personal data to be supplied in support of this election of transfer are to be used for processing your request for account consolidation. The personal data you supply may, for such purpose, be transferred to the trustee(s) concerned, the relevant service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority (MPFA).

(d) "Consolidation" and "consolidating" of multiple personal accounts refers to transferring all MPF accrued benefits (benefits) from several MPF personal accounts to an account under your elected MPF registered scheme (scheme).

(e) "Contribution account" - an account in a scheme which is mainly used to receive MPF contributions (both employer and employee portions) made by an employer for or on behalf of the employee or MPF contributions made by a self- employed person.

(f) "Personal account" - an account in a scheme which is mainly used to receive the benefits transferred from other contribution or personal account(s).

Reminders Before Consolidating

(g) Please ensure that you have a personal account or a contribution account in your elected scheme to which the benefits in your personal accounts indicated in the Appendix are to be transferred and consolidated. Otherwise, you have to submit a membership enrollment form before or at the same time you submit this Form and the Appendix to your elected trustee. Please consult your elected trustee for the procedures and required documents for setting up an account.

(h) For each of your personal accounts to be consolidated using this Form, the entirety of your benefits in the account, including voluntary contributions (if any and subject to the governing rules of the scheme), will be transferred to your elected scheme in a lump sum.

(i) In order to prevent a third party from filling in incorrect information, please DO NOT sign on a blank form. After the completed Form and Appendix have been received by your elected trustee, the administration procedures taken by the trustees may not be reversible.

(j) If you are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that guaranteed fund may result in some or all of the guarantee conditions not being satisfied; thus affecting your entitlement to the guarantee. Please check the offering document of the scheme(s) or consult your trustee(s) for details.

(k) If you wish to transfer your benefits from one scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy ("DIS") if you either (i) do not give or have not given any investment instructions for the account to the trustee of your elected scheme or (ii) have given investment instructions for the account to invest benefits according to the DIS. Please approach the trustee of the elected scheme to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in the elected scheme, please also approach the trustee of the elected scheme.

(l) If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the DIS of the scheme, you should be aware that the de-risking mechanism of the DIS starts at the age of 50. If the annual de-risking of your investment in the DIS and your transfer request take place at around the same time, the trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant trustee(s) if you wish to know the details of how the trustee(s) will handle these transactions.

(m) Please refer to the MPFA's publications available from the MPFA website (www.mpfa.org.hk) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment.

Enquiries

(n) Information about a scheme is set out in the offering document of that scheme. This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the relevant trustees for enquiries about account details and information on specific schemes or funds.

(o) For general enquiries regarding account consolidation, you may contact the relevant trustees or the MPFA (email: mpfa@mpfa.org.hk or hotline: 2918 0102).

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)
Postal Address 郵寄地址: 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
Customer Service Centre 客戶服務中心: 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

MPF

FORM MPF(S) - P(C)

Please use BLOCK LETTERS to complete this Form.

SCHEME MEMBER'S REQUEST FOR ACCOUNT CONSOLIDATION FORM

(for consolidating multiple personal accounts into one account)

Section 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap. 485A)

SECTION I. SCHEME MEMBER DETAILS

Name [1] (*as shown on your Hong Kong Identity (HKID) Card*)	Surname:				
	Other Name:				
Identification	HKID Card No.:				
	Passport No.: (*ONLY for scheme member without HKID Card*)				
Contact Details	Home /Daytime phone number:			Mobile Phone No.:	
	Email Address (if any):				
Correspondence Address	Flat/Room	Floor	Block	Building	
	Estate			Street No.	Street
	District / Country (if not Hong Kong)			Hong Kong / Kowloon / New Territories (*delete whichever is inappropriate*)	

SECTION II. MY ELECTED SCHEME

I elect to transfer all MPF accrued benefits (benefits) from my personal accounts indicated in the Appendix to my elected scheme[2]:

Name of My Elected Scheme	☐ AIA MPF - Prime Value Choice **OR** ☐ Others (please specify) : ___
Account Type (Select one only and ✓ as appropriate)	☐ Personal account **OR** ☐ Contribution account (Employer's Identification No.[3]:)
Scheme Member Account No. [4]	

SECTION III. AUTHORISATION AND DECLARATION

(a) I hereby give consent to the trustee of my elected scheme and the MPFA to disclose information supplied by me in support of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

(b) I hereby give the trustee(s) indicated in the Appendix an instruction to terminate my relevant personal accounts as referred to in the Appendix upon transfer of the full benefits to my elected scheme and there is no residual balance in the said accounts.

(c) I declare that I have read and understood the Notes on page 1 of this Form and the Explanatory Notes and to the best of my knowledge and belief, the information given in this Form and the Appendix is correct and complete.

(d) I confirm that I have read, understood and agreed to the Personal Information Collection Statement of AIA Company (Trustee) Limited ("AIA Trustee") (the "PICS"). I declare and agree that any personal data and other information relating to me or my account(s) or investment(s) contained in this application or collected, obtained, compiled or held by AIA Trustee by any means from time to time may be collected and utilized in accordance with the PICS. I acknowledge and consent to the transfer of my personal data to parties within or outside Hong Kong for the purposes and to the transferees as set out in the PICS. The updated version of the PICS which complies with the relevant rules and regulations is available for download: https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAT-PICS-English.pdf, and is also available upon request.

Information / Advice relating to transfer of benefits to the AIA MPF Scheme

(e) **I declare that: (please select (a) OR (b) and ✓ as appropriate; if no selection is made, we will assume that you HAVE NOT been invited, induced or advised by any registered MPF intermediaries)**

☐ (a) I HAVE NOT been invited, induced or advised by any registered MPF intermediaries to transfer to the AIA MPF Scheme.

OR

☐ (b) I have been invited, induced or advised by one or more registered MPF intermediaries to transfer to 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.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 and Member's Guide/ Happy Retirement Savings Programme leaflet/ AIA MPF Personal Account leaflet applicable to the New 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.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 New 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).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 trustee to new trustee, there will be a time lag during which the benefits will not be invested. I declare that I fully understand the information provided and discussed, including the rationale underlying the advice relating to transfer of benefits to the AIA MPF Scheme. The advice given to me is based on the following rationale(s):

(please ✓ the appropriate box(es))

☐ Schemes and fund choices ☐ Fund management fees ☐ Member services

☐ Other, please specify: _____

I hereby confirm that the sales process does not involve: (i) any claims that the New Scheme/constituent fund under the New Scheme is preferred over the scheme/fund I participated/invested in; (ii) any advice, invitation or inducement relating to choosing a particular constituent fund. I have been informed by my registered MPF intermediary that if no constituent fund is selected, all contributions (including transfer-in monies) will be automatically invested according to the MPF Default Investment Strategy (the "DIS"). My registered MPF intermediary has explained to me the key features of the DIS, such as its automatic de-risking features and fee controls.

Clients with special needs

This part is applicable only if you have been invited, induced or advised by any registered MPF intermediaries to transfer to the AIA MPF Scheme.

(f) Pursuant to section 34ZL of the Mandatory Provident Fund Schemes Ordinance, I declare that: **(please select (a) OR (b) and ✓ as appropriate)**

☐ (a) I AM NOT visually or otherwise impaired and/or my education level IS NOT primary or below such that I can make a key decision* independently.

OR

☐ (b) I am visually or otherwise impaired and/or my education level is primary or below such that I cannot make a key decision* independently, and **(please ✓ the appropriate box)**

☐ I would not like to be accompanied by a witness during the sales process.

OR

☐ I would like to be accompanied by the following witness during the sales process: **(please ✓ the appropriate box)**

☐ my companion. **OR** ☐ another intermediary or member of staff (i.e. a third party).

Name of witness	Signature of witness	Date (yyyy/mm/dd)

* As defined in the MPF legislation, it refers to: (i) choosing a particular constituent fund; (ii) making a transfer that would involve a transfer out of a guaranteed fund; (iii) making an early withdrawal of accrued benefits from the MPF system; or (iv) making voluntary contributions into a particular registered scheme/constituent fund.

Signature[5]	Date (*YYYY/MM/DD*)

APPENDIX. LIST OF MY PERSONAL ACCOUNTS FOR CONSOLIDATION

Please indicate the personal accounts you elect to consolidate by filling in the Scheme Member Account No.[5]:

Trustee Name	Scheme Name	Scheme Member Account No.
AIA Company (Trustee) Limited	AIA MPF - Prime Value Choice	
Bank Consortium Trust Company Limited	AMTD MPF Scheme	
	BCT (MPF) Industry Choice	
	BCT (MPF) Pro Choice	
	BCT Strategic MPF Scheme	
	Manulife RetireChoice (MPF) Scheme	
Bank of Communications Trustee Limited	BCOM Joyful Retirement MPF Scheme	
Bank of East Asia (Trustees) Limited	BEA (MPF) Industry Scheme	
	BEA (MPF) Master Trust Scheme	
	BEA (MPF) Value Scheme	
BOCI-Prudential Trustee Limited	BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme	
	My Choice Mandatory Provident Fund Scheme	
China Life Trustees Limited	China Life MPF Master Trust Scheme	
HSBC Provident Fund Trustee (Hong Kong) Limited	Fidelity Retirement Master Trust	
	Haitong MPF Retirement Fund	
	Hang Seng Mandatory Provident Fund - SuperTrust Plus	
	HSBC Mandatory Provident Fund - SuperTrust Plus	
Manulife Provident Funds Trust Company Limited	Manulife Global Select (MPF) Scheme	
Principal Trust Company (Asia) Limited	Principal MPF Scheme Series 800	
	Principal MPF – Simple Plan	
	Principal MPF – Smart Plan	
Sun Life Trustee Company Limited	Sun Life Rainbow MPF Scheme	
YF Life Trustees Limited	MASS Mandatory Provident Fund Scheme	

The trustees and schemes listed above are as of: 29 November 2023

For Intermediary Use

Intermediary/ Agent Code : ⌊ ⌋ **Agency Code :** ⌊ ⌋

Intermediary/ Agent Name : ⌊ ⌋ **Staff code/ Name :** ⌊ ⌋ **Received date & time :** _____ yyyy / mm / dd

By completing the intermediary information, I confirm that I have witnessed the signature and verified the original HKID card/ Passport copy of the member as stated on the document attached to this transfer application (if applicable).

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)
Postal Address 郵寄地址: 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
Customer Service Centre 客戶服務中心: 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

MPF

SIGNATURE VERIFICATION

(Applicable for transfer request submitted through intermediaries and/or new Personal Account set up)

Scheme Name : AIA MPF – Prime Value Choice

Declaration

I confirm that the Hong Kong Identity Card/Passport provided is a copy of the original and my signature is my own signature. I request the trustee of any Mandatory Provident Fund ("MPF") schemes in which I am a member to process the transfer application(s) submitted together with this document. I agree and understand that my signature provided here would be used for the current application(s) only and would not change any of my signature record which I have provided to the MPF trustee previously.

I also confirm and agree the MPF trustee to use this Hong Kong Identity Card/Passport copy for setting up my new Personal Account (if applicable).

Member's Signature

Please paste your HKID Card / Passport copy here

Explanatory Notes

1. If you do NOT possess a HKID Card, please fill in your name as shown on your passport.

2. Your request for consolidating personal accounts may not be processed if the name of your elected scheme or your scheme member account number of that scheme is not provided or is incorrect. The information can be found in your notice of participation or, as the case may be, membership certificate, notice of acceptance, or annual benefit statement. If you are in doubt, please contact the relevant trustee.

   Please note that only the personal accounts you have elected in the Appendix will be consolidated. Those that you have not elected in the Appendix will not be consolidated.

3. The employer's identification number is the number assigned by the trustee to the employer concerned. Trustees may use different names for this number (e.g. account number, company code, contract number, employer account number, employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). The number can be found in the statements issued by the trustees or through the member enquiry facilities available from trustees. If you are in doubt, please contact your trustee or your employer.

4. You may leave the scheme member account number blank if you have recently enrolled in the scheme and have not been notified of the scheme member account number. If you are in doubt, please contact the relevant trustee.

5. Your request for consolidating a particular personal account listed in the Appendix may not be processed if:

   a. your scheme member account number of that personal account is not provided or is incorrect; or

   b. the signature in this Form does not match the specimen signature previously given to that particular trustee.

   However, consolidation will proceed for other personal accounts where the scheme member account number and signature are correct.

   Your scheme member account number can be found in your notice of participation or, as the case may be, membership certificate, notice of acceptance, or annual benefit statement. If you are in doubt, please contact the relevant trustee(s).

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)
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客戶服務中心: 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

MPF

第 MPF(S) - P(P) 號表

附件 3

請注意:
- 填寫本表格前，請先閱讀第 6 至 7 頁的**《「僱員自選安排」強積金累算權益(權益)轉移指南》**（**《指南 》**）。
- 請在不適用處填上「不適用」。

「僱員自選安排」—轉移選擇表格(適用於僱員在現職期間把現職的強積金(註冊計劃（原計劃）供款賬戶內的強積金累算權益(權益)轉移至自選計劃（新計劃）的賬戶)

《強制性公積金計劃（一般）規例》（第 485A 章）第 148A 及 148B 條

你就此項轉移申請提供的個人資料，將用作處理你的轉移申請。你提供的個人資料可能會為該目的而轉交相關受託人、相關服務提供者，以及政府或規管機構， 包括強制性公積金計劃管理局（ 積金局）。

第 I 部：計劃成員資料

姓名 註 1 *（與你的香港身分證上的姓名相同）*	姓氏：			
	名字：			
身分證明	香港身分證號碼：			
	護照號碼： *（本欄僅供沒有香港身分證的計劃成員填寫）*			
聯絡資料	住宅/日間聯絡電話號碼：	手提電話號碼：		
	電郵地址（ 如有）：			
通訊地址	香港 / 九龍 / 新界 （請刪去不適用者）	地區 / 國家（ 如非香港地區）		
	街道	街道號碼	屋邨	
	大廈	座	樓層	室

第 II 部：原計劃的供款賬戶資料

原計劃名稱 註 2	
計劃成員賬戶號碼 註 2	
僱主識別號碼 註 2 及註 3	

第 III 部：轉移權益 [註4]

請註明你擬把原計劃供款賬戶內哪部分的權益轉移至另一個強積金賬戶。
請選擇(a)**或**(b)，並於適當方格內填上✓ 號：

□ (a) **轉移全部權益**

本人擬在管限規則准許下轉移原計劃供款賬戶內以下**全部**權益：

- 現職期間的僱員強制性供款[註 5 及註 6]
- 現職期間的僱員自願性供款[註 7 及註 8]
- 以往工作所累積並已轉移至供款賬戶的強制性供款[註 9]
- 以往工作所累積並已轉移至供款賬戶的自願性供款[註 8 及註 10]

請把權益轉移至以下個人賬戶：

新計劃名稱 [註 11]	❑友邦強積金優選計劃 ❑其它(請註明)：
計劃成員賬戶號碼 [註 11]	

或

□ (b) **轉移部分權益**

本人擬在管限規則准許下轉移原計劃供款賬戶內以下**部分**權益： 你可選擇轉移以下其中一部分或多個部分， 請於適當方格內填上 ✓ 號）

由原計劃轉出的權益	**接收權益的賬戶類別**
□ 現職期間的僱員強制性供款[註 5 及註 6]	只限個人賬戶
□ 現職期間的僱員自願性供款[註 7 及註 8]	
□ 以往工作所累積並已轉移至供款賬戶的強制性供款[註 9]	個人賬戶 **或** 供款賬戶
□ 以往工作所累積並已轉移至供款賬戶的自願性供款[註 8 及註 10]	

請把上述選擇的權益轉移至以下賬戶：

新計劃名稱 [註 11]	❑友邦強積金優選計劃 ❑其它(請註明)：
賬戶類別 [註 11] *(只可選擇一項*，請於適當方格內填上✓ 號)* **計劃成員賬戶號碼** [註 11]	□ 個人賬戶 **或** □ 供款賬戶（ 僱主識別號碼[註 3 及註 11]： ）

* *如欲把供款賬戶內不同部分的權益轉移至不同的強積金賬戶，請就每個將會接收該等權益的強積金賬戶分別填寫一份第 MPF(S)-P(P)號表格。*

第 IV 部：授權及聲明

(a) 本人同意，新計劃的受託人及積金局可為處理本人的轉移申請，向相關受託人及相關服務提供者披露本人就此項轉移申請提供的資料，或使該等機構 / 人士能夠取覽或披露該等資料。

(b) 本人確認及聲明：
- 本人已閱讀及明白註釋及《指南》的內容，並自願選擇按照本表格轉移強積金權益；
- 在提交本表格當日，本人受僱於為本人開立原計劃供款賬戶的僱主；及
- 盡本人所知所信，本表格所提供的資料均屬正確無訛且無缺漏。

(c) 我確認我已閱讀、明白及同意 友邦（信託）有限公司（「友邦信託」）的個人資料收集聲明（「該聲明」）。
我聲明及同意在本申請所載或友邦信託不時以任何方法收集、獲得、編製或持有的任何關於我的個人資料及關於我的僱員的帳戶或投資的其他資料，可根據該聲明收集及使用。我知悉及同意就該聲明所述目的及向有關各方轉移我的個人資料至香港境內或境外各方。該聲明符合相關守則及法規的最新版本可於此下載：https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAT-PICS-Traditional-Chinese.pdf，及可向友邦信託索取。

有關轉移權益至友邦強積金計劃之資訊 / 意見

(d) **本人聲明：（請選擇(a) 或 (b)，並於適當方格內填上✓號；如果沒有選擇，我們將假設閣下未獲任何註冊強積金中介人邀請、誘使或建議。）**

❑ (a) 本人未獲任何註冊強積金中介人邀請、誘使或建議轉移至友邦強積金計劃。

或

❑ (b) 本人獲註冊強積金中介人邀請、誘使或建議轉移至友邦強積金計劃。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。本人確認已收妥及閱讀新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)、主事中介人及附屬中介人資料及成員資料冊/退休樂單張/休悠樂單張及「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。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新計劃，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了解有關詳情。 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。本人明白從原受託人轉移至新受託人過程 需時，過程中權益將不會作任何投資。本人聲明已完全明白所提供及討論之資料，包括有關轉移權益至友邦強積金計劃的意見之理據。向本人提供的意見乃基於以下理據：

（請於適當方格內填上✓號）

❑ 計劃及基金選擇　❑ 基金管理費　❑ 成員服務

❑ 其他，請註明：_____

本人謹此確認在銷售過程中，並無涉及：(i) 任何就新計劃/新計劃內成分基金優於本人正參與/投資的計劃/基金之聲 言；(ii) 任何與選擇特定成分基金相關的意見、邀約或誘使。本人的註冊強積金中介人已告知本人若不選擇任何成分基金，供款(包括轉入的款項)便會自動按強積金預設投資策略進行投資。本人的註冊強積金中介人已向本人解釋強積金預設投資策略的特點，如自動降低風險及設有收費管控。

需要特別照顧的客戶

只有你獲註冊強積金中介人邀請、誘使或建議參加友邦強積金計劃，本部分始適用。

(e) 根據《強制性公積金計劃條例》第 34ZL 條，本人聲明: **(請選擇(a) 或 (b)，並於適當方格內填上✓號)**

❑ (a) 本人並非視障或有其他障礙及/或本人的教育程度並非為小學或以下，本人能夠自行作出重要決定*。

或

❑ (b) 本人因視障或其他障礙及/或本人的教育程度為小學或以下，本人無法自行作出重要決定* **(請於適當方格內填上✓號)**

❑本人不願意銷售過程由見證人陪同。**或**

❑本人願意銷售過程由以下見證人陪同：**(請於適當方格內填上✓號)**

❑ 本人的同伴。 **或** ❑另一名中介人或員工(即第三者)。

見證人姓名	見證人簽署	日期（年 / 月 / 日）

*根據強積金法例的定義，指(i) 選擇一項特定成分基金；(ii) 進行涉及轉移一項保證基金的權益轉移；(iii) 提早 從強積金制度中提取權益；或 (iv) 向一個/項特定註冊計劃/成分基金作自願性供款。

成員簽署[註 12]　　日期（年 / 月 / 日）

～填妥本表格後，請把第 1 頁至第 3 頁交予新計劃的受託人～

For Intermediary Use

Intermediary/ Agent Code : ⌊_____⌋ **Agency Code :** ⌊_____⌋

Intermediary/ Agent Name : ⌊_____⌋ **Staff code/ Name :** ⌊_____⌋ **Received date & time :** _____ ccyy / mm / dd

By completing the intermediary information, I confirm that I have witnessed the signature and verified the original HKID card/ Passport copy of the member as stated on the document attached to this transfer application (if applicable).

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)
Postal Address 8/F, AIA Financial Centre, 712 Prince Edward Road East,
郵寄地址: Kowloon, Hong Kong
香港九龍太子道東712 號友邦九龍金融中心8 樓
Customer Service Centre 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
客戶服務中心: 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

MPF

簽名核實證明文件

(適用於經中介人遞交之轉移指示及/或設立新個人賬戶申請)

計劃名稱 :友邦強積金優選計劃

聲明

本人確認在此提供的香港身份證/護照是原件的副本，而簽名是本人的簽名。本人要求任何本人作為強制性公積金計劃(強積金)成員的受託人處理與這信件一同遞交的轉移申請。本人同意及明白在此提供的簽名將僅用於目前的轉移申請，而並不會更改任何本人過去曾經提供強積金受託人的簽名記錄。

本人亦確認及同意強積金受託人以以下香港身份證/護照副本為本人設立新的個人賬戶(如適用)。

成員簽署

請在此貼上香港身份證/護照副本

註釋

(1) 如你**沒有**香港身分證，請填上你在護照上的姓名。

(2) 如你沒有提供原計劃名稱、計劃成員帳戶號碼或僱主識別號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可於成員證明書、接納通知、參與通知或周年權益報表獲取有關資料。如有疑 問，請 聯絡你原計劃的受託人或僱主。有關強 積金計劃的名稱，可參 閱積金局網站（ www.mpfa.org.hk）的資料。

(3) 僱主識別號碼即受託人爲有關僱主編配的號碼。受託人或會使用不同名稱來設定此號碼（例如帳戶編號、僱主編號、合約編號、強積金客戶編號、參與計劃編號、計劃編號、附屬計劃編號）。你可查閱受託人發出的報表或透過受託人提供的成員查詢服務獲取該號碼。如有疑問，請聯絡你的受託人或僱主。

(4) 如你在第 III 部選擇轉移的權益的任何部分是「零」結餘，則該部分權益的轉移申請將不獲處理。

(5) (a)這是指《強制性公積金計劃（一般）規例》（《規例》）第 78(6)(b)條所提述的分帳戶內的全部權益。
(b)就行業計劃的臨時僱員而言， 這個分帳戶一般包含在成員以臨時僱員身分受僱於不同僱主期間向這個分帳戶所作出的所有僱員強制性供款所產生的權益。

(6) 如你已於同一公曆年內要求把僱員強制性供款所產生的權益轉出一次（或如原計劃的管限規則准 許你作出多於一次的轉移，但你轉移的次數已達該上限），則該部分權益的轉移申請將不獲處理。 詳情請參閱《指南》第(4)段。

(7) (a)這是指《規例》第 78(6)(e)條所提述的分帳戶內的全部權益。
(b)就行業計劃的臨時僱員而言，這個分帳戶一般包含在成員以臨時僱員身分受僱於不同僱主期間向這個分帳戶所作出的所有僱員自願性供款所產生的權益。

(8) 如你要求把自願性供款所產生的權益轉出，但原計劃的管限規則並不准許轉移，則有關轉移選項將不獲處理。詳情請參閱《指南》第(3)段。

(9) 這是指《規例》第 78(6)(c)條所提述的分帳戶內的全部權益。這部分一般包含以往受僱或自僱工作 所 累積並已轉移至現職供款帳戶的強制性供款所產生的權益。

(10) 這是指《規例》第 78(6)(f) 條所提述的分帳戶內的全部權益。這部分一般包含以往受僱或自僱工作所累積並已轉移至現職供款帳戶的自願性供款所產生的權益。

(11) 如你沒有提供新計劃名稱、帳戶類別、僱主識別號碼或計劃成員帳戶號碼，或所提供的資料有誤， 則此項轉移申請或不獲處理。你可於成員證明書、接納通知、參與通知或周年權益報表獲取有關資 料。不過，如你最近才參加計劃，並未獲悉僱主識別號碼及計劃成員帳戶號碼，則可留空此項。如有疑問，請聯絡你 新計劃的受託人。有關強積金計劃的名稱，可參閱積金局網站（ www.mpfa.org.hk）的資料。

(12) 你的簽署必須與你之前給予原計劃的受託人的簽署式樣相同。 請注意， 若本表格上的簽署與你之前 給予原計劃的受託人的簽署式樣不符，有關 轉移或不獲處理。如有疑問，請聯絡你原計劃的受託人。

第 MPF(S)-P(P)號表格、註釋及本《指南》的用詞解釋：

(a) 「供款帳戶」—與《強制性公積金計劃（一般）規例》（《規例》）第 2 條所載的供款帳戶具有相同含義。一般是指強積金註冊計劃（計劃）下主要用以接收僱主爲僱員所作 出以及代表僱員所作出的強積金供款（包括僱主及僱員部分）的帳戶。供款帳戶亦包括 自僱人士在新計劃下主要用以接收其在自僱期間所作出的強積金供款的帳戶。

(b) 「個人帳戶」—與《規例》第 2 條所載的個人帳戶具有相同含義。一般是指計劃下主要用以接收由其他供款或個人帳戶轉入的權益的帳戶（不包括供款帳戶及可扣稅自願性供款帳戶）。

(c) 「原計劃」—指轉出你的權益的計劃。

(d) 「新計劃」—指轉入你的權益的計劃。如你選擇把權益轉移至同一計劃的另一個帳戶，本表格所指的新計劃將與原計劃相同。

(e) 「公曆年」—指由 1 月 1 日至 12 月 31 日的一年期間。

僱員在「僱員自選安排」下可享的權利

(1) 在「僱員自選安排」下，僱員可在**受僱期間**，選擇把原計劃供款帳戶內的部分權益轉移至其自選新計劃的帳戶。

(2) 下表載列供款帳戶內由強制性供款所產生的各部分權益，以及這些權益在「僱員自選安排」下可作轉移的情況：

供款帳戶內的各部分權益		在「僱員自選安排」下 權益可作轉移的情況
(a)	現職期間的 僱主強制性供款	不可轉移
(b)	現職期間的 僱員強制性供款	可**每公曆年一次**[1]轉出 至強積金個人帳戶
(c)	以往工作所累積並已轉移至 供款帳戶的強制性供款	可隨時轉出至 強積金個人帳戶或供款帳戶

(3) 至於自願性供款所產生的權益是否可作轉移，則視乎原計劃的管限規則而定。有關規則的詳情，請查閱原計劃的要約文件，該文件可於原計劃的受託人的網站下載，你也可向僱主或原計劃的受託人查詢詳情。

(4) 你在每個公曆年內只可選擇轉出僱員強制性供款所產生的權益一次（如原計劃的管限規則訂明可多次轉出權益，則不在此限）。**新計劃的受託人收到已填妥的轉移選擇表格日期將用作計算轉移次數有否超出限額。**你可於原計劃的受託人向你發出的轉移結算書上查閱該日期，或直接向原計劃的受託人查詢。

(5) 請注意，你在現職期間所作出的僱員強制性供款及僱員自願性供款（如有）所產生的權 益只可轉移至**個人帳戶**，不可轉移至其他供款帳戶（註：如你同時從事多於一份受僱工作，則會持有其他供款帳戶）。

(6) 從原計劃轉出你的權益後，現職僱主日後爲你作出的供款（包括僱主及僱員部分），將繼續由受託人分配至你在原計劃的供款帳戶。如你日後想把該等僱員強制性供款所產生的權益轉移至你在新計劃的帳戶，便須在下一個公曆年另行作出轉移選擇（如原計劃的管限規則訂明可在同一公曆年內多次轉出權益， 則可提前在同一公曆年內選擇轉出權益）。

[1] 如原計劃的管限規則訂明可多次轉出權益， 則不在此限。

作出轉移選擇前的注意事項

(7) 在你決定把權益轉移至另一個計劃前，你應考慮以下因素：

(a) 受託人的服務（例如向計劃成員發出權益報表的頻密程度及每年可免費轉換基金的次數）；
(b) 基金的收費（詳情請參閱積金局網站）；
(c) 計劃所提供的基金選擇，尤須注意計劃有否提供切合你需要的基金；及
(d) 如你現時投資於強積金保證基金，則從該保證基金轉出權益可能導致你不符合部分或所有保證條件，從而影響你享有保證的資格。有關詳情請查閱原計劃的要約文 件，或向原計劃的受託人查詢。

(8) 在決定把權益轉移至新計劃前，你應盡量瞭解新計劃的內容。有關新計劃的詳情，請查閱新計劃的要約文件，該文件可於新計劃的受託人的網站下載，你也可向新計劃的受託人查詢詳情。

(9) 請確保你在新計劃已開立強積金帳戶。否則，你在提交本表格之時或在此之前，須向新計劃的受託人提交成員參加計劃表格。有關開立帳戶的程序及所需文件，請向新計劃的受託人查詢。

(10) 如欲把權益從一個計劃轉移至另一個計劃，請留意轉入帳戶的權益將會如何投資。一般而言，如你(a)沒有或尚未就有關帳戶向新計劃的受託人給予任何投資指示；或(b)已就有關帳戶給予投資指示，要求把權益按照預設投資策略投資，則轉入該帳戶的權益將按照預設投資策略投資。如有需要，請向新計劃的受託人查詢詳情。如欲就新計劃的帳戶更改或給予投資指示，亦請聯絡新計劃的受託人。

(11) 如你已年滿或快將年滿 50 歲，而現時你的權益是按照計劃的預設投資策略投資，請留意 預設投資策略的降低投資風險機制，會由計劃成員年滿 50 歲開始運作。如計劃的受託人在預設投資策略下按年降低你的投資風險的時間，與接獲你的轉移權益申請的時間相當接近，該計劃的受託人將根據其運作程序及在符合《強制性公積金計劃條例》規定的情 況下，訂定處理降低風險及轉移權益的次序。如欲瞭解受託人如何處理該等交易，請向 相關受託人查詢詳情。

(12) 爲免被第三者填上不正確的資料，**請勿在空白的表格上簽署**。在新計劃的受託人收到已填妥的選擇表格後，之前由受託人採取的行政步驟未必能夠撤銷。

(13) 在你作出轉移選擇當日，你現有強積金帳戶顯示的基金單位數目，或會與贖回基金單位當日的數目有所不同。原計劃的受託人將在贖回日贖回你選擇從強積金帳戶轉出的各部分權益的所有基金單位，以及轉出贖回權益。新計劃的受託人會按照你的指示買入基金單位，過程中會出現一至兩個星期的「投資空檔」。在此期間，你的權益不會投資於任何基金，假若這時基金價格因市場波動而出現變化，便有機會出現「低賣高買」的風險。

(14) 有關選擇計劃時各項考慮因素及強積金投資的潛在風險，請參閱積金局網站（www.mpfa.org.hk）的相關宣傳刊物。

查詢

(15) 計劃的要約文件載有該計劃的資料，這些資料將有助你決定是否把權益轉移至該計劃。如欲查詢帳戶詳情及個別計劃或基金的資料，請聯絡相關受託人。

(16) 有關「僱員自選安排」的一般查詢，可聯絡相關受託人或積金局（電郵地址：mpfa@mpfa.org.hk 或積金局熱線電話：2918 0102）。

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)
Postal Address 郵寄地址: 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
Customer Service Centre 客戶服務中心: 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

MPF

FORM MPF(S) - P(P)

Appendix 3

Please note:
- Please use **BLOCK LETTERS** for completion of this Form.
- Please read the **"Guide to Transfer of MPF Accrued Benefits (Benefits) under Employee Choice Arrangement ("ECA")"** (**"the Guide"**) on Page 6 - 7 before you complete this Form.
- Please insert "N.A." if not applicable.

EMPLOYEE CHOICE ARRANGEMENT ("ECA") - TRANSFER ELECTION FORM

(for an employee to transfer MPF accrued benefits (benefits) from a contribution account in an MPF registered scheme (scheme) under current employment (Original Scheme) to an account in a scheme elected by the employee (New Scheme) during employment)

Sections 148A and 148B of the Mandatory Provident Fund Schemes (General) Regulation (CAP 485A)

The personal data to be supplied in support of this election of transfer are to be used for processing your election of transfer. The personal data you supply may, for such purpose, be transferred to the trustee(s) concerned, the relevant service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority ("MPFA").

SECTION I: SCHEME MEMBER DETAILS

Name [1] (*as shown on your Hong Kong Identity (HKID) Card*)	Surname:			
	Other Name:			
Identification	HKID Card No.:			
	Passport No.: (*ONLY for scheme member without HKID Card*)			
Contact Details	Home/Daytime Phone No.:		Mobile Phone No.:	
	Email Address (if any):			
Correspondence Address	Flat/Room	Floor	Block	Building
	Estate		Street No.	Street
	District / Country (if not Hong Kong)		Hong Kong / Kowloon / New Territories (*delete whichever is inappropriate*)	

SECTION II: CONTRIBUTION ACCOUNT INFORMATION IN ORIGINAL SCHEME

Name of Original Scheme[2]	
Scheme Member Account No.[2]	
Employer's Identification No.[2,3]	

SECTION III: TRANSFER OF BENEFITS [4]

Please indicate the part(s) of benefits in your contribution account of Original Scheme that you wish to transfer out to another MPF account.

Please select either option (a) **or** (b) and ✓ as appropriate:

☐ (a) **Transfer ALL Benefits**

I wish to transfer **ALL** the benefits comprising the following parts from my contribution account of Original Scheme as its governing rules permit:

- Employee mandatory contributions in current employment[5,6]
- Employee voluntary contributions in current employment[7,8]
- Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s)[9]
- Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s)[8,10]

Please transfer the benefits to the following personal account:

Name of New Scheme[11]	❑ AIA MPF - Prime Value Choice ❑ Others (please specify) : _____
Scheme Member Account No.[11]	

OR

☐ (b) **Transfer Part(s) of Benefits**

I wish to transfer the following **part(s)** of the benefits from my contribution account of Original Scheme as its governing rules permit: (you may select one or more parts below and ✓ as appropriate)

Benefits to be transferred from Original Scheme	**Type of account receiving the benefits**
☐ Employee mandatory contributions in current employment[5,6]	Personal account only
☐ Employee voluntary contributions in current employment[7,8]	Personal account only
☐ Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s)[9]	Personal account **or** contribution account
☐ Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s)[8,10]	Personal account **or** contribution account

Please transfer the benefits selected above to the following account:

Name of New Scheme[11]	❑ AIA MPF - Prime Value Choice ❑ Others (please specify) : _____
Account Type[11] (*Select one only* and ✓ as appropriate*)	☐ Personal account **or** ☐ Contribution account (Employer's Identification No.[3,11:])
Scheme Member Account No.[11]	

** If you wish to transfer different parts of benefits from your contribution account to different MPF accounts, please fill in a separate Form MPF(S)-P(P) for each MPF account that receives the benefits.*

SECTION IV: AUTHORISATION AND DECLARATION

(a) I hereby give consent to the trustee of New Scheme and the MPFA to disclose information supplied by me in support of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

(b) I confirm and declare that:

- I have read and understood the Explanatory Notes and the Guide, and have voluntarily elected to transfer my MPF benefits in accordance with this Form;
- at the date of submitting this Form, I am employed by the employer in relation to the contribution account in Original Scheme; and
- to the best of my knowledge and belief, the information given in this Form is correct and complete.

(c) I confirm that I have read, understood and agreed to the Personal Information Collection Statement of AIA Company (Trustee) Limited ("AIA Trustee") (the "PICS").

I declare and agree that any personal data and other information relating to me or my account(s) or investment(s) contained in this application or collected, obtained, compiled or held by AIA Trustee by any means from time to time may be collected and utilized in accordance with the PICS. I acknowledge and consent to the transfer of my \ personal data to parties within or outside Hong Kong for the purposes and to the transferees as set out in the PICS. The updated version of the PICS which complies with the relevant rules and regulations is available for download: https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAT-PICS-English.pdf, and is also available upon request.

Information / Advice relating to transfer of benefits to the AIA MPF Scheme

(d) **I declare that: (please select (a) OR (b) and ✓ as appropriate; if no selection is made, we will assume that you HAVE NOT been invited, induced or advised by any registered MPF intermediaries)**

☐ (a) I HAVE NOT been invited, induced or advised by any registered MPF intermediaries to transfer to the AIA MPF Scheme.

OR

☐ (b) I have been invited, induced or advised by one or more registered MPF intermediaries to transfer to 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. 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 and Member's Guide/ Happy Retirement Savings Programme leaflet/ AIA MPF Personal Account leaflet applicable to the New 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. 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 New 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). 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 trustee to new trustee, there will be a time lag during which the benefits will not be invested. I declare that I fully understand the information provided and discussed, including the rationale underlying the advice relating to transfer of benefits to the AIA MPF Scheme. The advice given to me is based on the following rationale(s):

(please ✓ the appropriate box(es))

☐ Schemes and fundchoices ☐ Fund management fees ☐ Member services

☐ Other, please specify: _____

I hereby confirm that the sales process does not involve: (i) any claims that the New Scheme/constituent fund under the New Scheme is preferred over the scheme/fund I participated/invested in; (ii) any advice, invitation or inducement relating to choosing a particular constituent fund. I have been informed by my registered MPF intermediary that if no constituent fund is selected, all contributions (including transfer-in monies) will be automatically invested according to the MPF Default Investment Strategy (the "DIS"). My registered MPF intermediary has explained to me the key features of the DIS, such as its automatic de-risking features and fee controls.

Clients with special needs

This part is applicable only if you have been invited, induced or advised by any registered MPF intermediaries to transfer to the AIA MPF Scheme.

(e) Pursuant to section 34ZL of the Mandatory Provident Fund Schemes Ordinance, I declare that: **(please select (a) OR (b) and ✓ as appropriate)**

☐ (a) I AM NOT visually or otherwise impaired and/or my education level IS NOT primary or below such that I can make a key decision* independently.

OR

☐ (b) I am visually or otherwise impaired and/or my education level is primary or below such that I cannot make a key decision* independently, and **(please ✓ the appropriate box)**

☐ I would not like to be accompanied by a witness during the sales process.

OR

☐ I would like to be accompanied by the following witness during the sales process: **(please ✓ the appropriate box)**

☐ my companion. **OR** ☐ another intermediary or member of staff (i.e. a third party).

Name of witness	Signature of witness	Date (yyyy / mm / dd)

* As defined in the MPF legislation, it refers to: (i) choosing a particular constituent fund; (ii) making a transfer that would involve a transfer out of a guaranteed fund; (iii) making an early withdrawal of benefits from the MPF system; or (iv) making voluntary contributions into a particular registered scheme/constituent fund.

Member's Signature [12] | Date (yyyy / mm / dd)

~Please send page 1 to page 3 of this Form to the trustee of New Scheme after completion~

For Intermediary Use

Intermediary/ Agent Code : ⌊ | | | | | | ⌋ **Agency Code :** ⌊ | | | | | ⌋

Intermediary/ Agent Name : ⌊ _____ ⌋ **Staff code/ Name :** ⌊ _____ ⌋ **Received date & time :** _____ yyyy / mm / dd

By completing the intermediary information, I confirm that I have witnessed the signature and verified the original HKID card/ Passport copy of the member as stated on the document attached to this transfer application (if applicable).

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)
Postal Address 8/F, AIA Financial Centre, 712 Prince Edward Road East,
郵寄地址: Kowloon, Hong Kong
香港九龍太子道東712 號友邦九龍金融中心8 樓
Customer Service Centre 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
客戶服務中心: 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

SIGNATURE VERIFICATION
(Applicable for transfer request submitted through intermediaries and/or new Personal Account set up)

Scheme Name : AIA MPF – Prime Value Choice

Declaration

I confirm that the Hong Kong Identity Card/Passport provided is a copy of the original and my signature is my own signature. I request the trustee of any Mandatory Provident Fund ("MPF") schemes in which I am a member to process the transfer application(s) submitted together with this document. I agree and understand that my signature provided here would be used for the current application(s) only and would not change any of my signature record which I have provided to the MPF trustee previously.

I also confirm and agree the MPF trustee to use this Hong Kong Identity Card/Passport copy for setting up my new Personal Account (if applicable).

Member's Signature

Please paste your HKID Card / Passport copy here

Explanatory Notes

(1) If you do NOT possess a HKID Card, please fill in your name as shown on your passport.

(2) The transfer election may not be processed if the Name of Original Scheme, Scheme Member Account Number or the Employer's Identification Number is not provided or is incorrect. This information can be found in your membership certificate, notice of acceptance, notice of participation or annual benefit statement. If you are in doubt, please contact your trustee of Original Scheme or your employer. Please refer to the MPFA website (www.mpfa.org.hk) for the name of schemes.

(3) The Employer's Identification Number is the number assigned by the trustee to the employer concerned. Trustees may use different names for this number (e.g. account number, company code, contract number, employer account number, employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). The number can be found in the statements issued by the trustees or through the member enquiry facilities available from the trustees. If you are in doubt, please contact your trustee or your employer.

(4) If any part of the benefits chosen under section III contains nil balance, that part will not be processed.

(5) (a) This means all benefits in the sub-account referred to in section 78(6)(b) of the Mandatory Provident Fund Schemes (General) Regulation (the Regulation).

(b) For a casual employee in an industry scheme, this sub-account generally contains the benefits derived from all the employee mandatory contributions made to this sub-account whilst working as a casual employee with different employers.

(6) If you have already elected to transfer out the benefits derived from the employee mandatory contributions once (or, if the governing rules of Original Scheme allow more than once, but the transfer elections you have made have reached the maximum number of times allowed by the governing rules) in the same calendar year, transfer of that part of the benefits will not be processed. Please refer to paragraph (4) of the Guide for more information.

(7) (a) This means all benefits in the sub-account referred to in section 78(6)(e) of the Regulation.

(b) For a casual employee in an industry scheme, this sub-account generally contains the benefits derived from all the employee voluntary contributions made to this sub-account whilst working as a casual employee with different employers.

(8) If you request to transfer out the benefits derived from the voluntary contributions but the governing rules of Original Scheme do not allow this, the option(s) will not be processed. Please refer to paragraph (3) of the Guide for more information.

(9) This means all benefits in the sub-account referred to in section 78(6)(c) of the Regulation. This part generally contains benefits derived from the mandatory contributions that are attributable to your former employment(s) or former self-employment(s) and that have been transferred into the contribution account under current employment.

(10) This means all benefits in the sub-account referred to in section 78(6)(f) of the Regulation. This part generally contains benefits derived from the voluntary contributions that are attributable to your former employment(s) or former self-employment(s) and that have been transferred into the contribution account under current employment.

(11) The transfer election may not be processed if the Name of New Scheme, Account Type, Employer's Identification Number or your Scheme Member Account Number is not provided or is incorrect. The information can be found in your membership certificate, notice of acceptance, notice of participation or annual benefit statement. You may, however, leave the Employer's Identification Number and the Scheme Member Account Number blank if you have recently enrolled in the scheme and have not been notified of those numbers. If you are in doubt, please contact your trustee of New Scheme. Please refer to the MPFA website (www.mpfa.org.hk) for the name of schemes.

(12) The signature must be the same as your specimen signature previously given to your trustee of Original Scheme. Please note that the transfer may not be processed if the signature provided in this Form does not match the specimen signature previously given to your trustee of Original Scheme. If you are in doubt, please contact your trustee of Original Scheme.

Explanation of terms used in Form MPF(S)-P(P), the Explanatory Notes and this Guide:

(a) "Contribution account" – has the same meaning as in section 2 of the Mandatory Provident Fund Schemes (General) Regulation (the Regulation). Generally, it is an account in an MPF registered scheme (scheme) which is mainly used to receive MPF contributions (both employer and employee portions) made by an employer for an employee and on behalf of the employee. Contribution account may also include an account of a self-employed person in New Scheme which is mainly used to receive MPF contributions made by himself while self-employed.

(b) "Personal account" – has the same meaning as in section 2 of the Regulation. Generally, it is an account (other than a contribution account and TVC account) in a scheme which is mainly used to receive the benefits transferred from other contribution or personal account(s).

(c) "Original Scheme" – the scheme from which your benefits are to be transferred.

(d) "New Scheme" – the scheme to which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same scheme, the new scheme on this Form will be the same as the original scheme.

(e) "Calendar year" – the one-year period from 1 January to 31 December.

Rights of employees under the ECA

(1) Under the ECA, an employee can, **during employment**, make an election to transfer part of the benefits from a contribution account in Original Scheme to an account in New Scheme nominated by him.

(2) The table below shows the parts of benefits derived from the mandatory contributions in a contribution account and the transferability of these parts of benefits in a contribution account under the ECA.

Parts of benefits in a contribution account		**Under ECA**
(a)	Employer mandatory contributions in current employment	Not transferable
(b)	Employee mandatory contributions in current employment	Transferable to an MPF personal account **once per calendar year**[1]
(c)	Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s)	Transferable to an MPF personal account or contribution account anytime

(3) The transferability of benefits derived from voluntary contributions is subject to the governing rules of Original Scheme. Please check this information from the offering documents of Original Scheme, which can be found on the website of the trustee of Original Scheme. You may also consult your employer or contact the trustee of Original Scheme.

(4) You can only elect to transfer out the benefits derived from your employee mandatory contributions once per calendar year (unless the governing rules of Original Scheme provide for more frequent transfer-out). **The date the trustee of New Scheme receives the completed election form is adopted for counting that quota.** You may check that date from the transfer statement issued by your trustee of Original Scheme, or consult your trustee of Original Scheme directly.

(5) Please note that the benefits derived from your employee mandatory contributions in current employment and employee voluntary contributions in current employment (if any) can be transferred to **a personal account** only. They cannot be transferred to another contribution account (Note: if you are concurrently working for more than one employer, you would have other contribution accounts).

(6) After your benefits are transferred out from Original Scheme, future contributions made by your existing employer (both employer and employee portions) will continue to be made to your contribution account with the trustee of Original Scheme. If you want to transfer the benefits derived from the subsequent employee mandatory contributions to your account in New Scheme, you should make a separate transfer election in the next calendar year (or earlier if the governing rules of Original Scheme allow for more frequent transfer-out in a calendar year).

[1] Unless the governing rules of Original Scheme provide for more frequent transfer-out.

Reminders before making an election to transfer

(7) Before you decide to transfer your benefits to another scheme, you should take into consideration the following factors:

(a) services of the trustees (e.g. frequency of issuance of benefit statement to scheme members; number of free fund switching per year);

(b) fees and charges of the funds (for detailed information, please refer to the website of the MPFA);

(c) the range of fund choices offered by the schemes and in particular whether there are funds available that match what you need; and

(d) if you are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that guaranteed fund may result in some or all of the guarantee conditions not being satisfied; thus affecting your entitlement to the guarantee. Please check the offering document of Original Scheme or consult the trustee of Original Scheme for details.

(8) Before deciding to transfer benefits to New Scheme, you should try to understand as much as you can about New Scheme. Please check the information about New Scheme from the offering document of New Scheme, which can be found on the website of the trustee of New Scheme or contact the trustee of New Scheme.

(9) Please ensure that you have an MPF account in New Scheme. Otherwise, you have to submit a membership enrolment form before or at the same time you submit this Form to the trustee of New Scheme. Please consult your trustee of New Scheme for the procedures and required documents for setting up an account.

(10) If you wish to transfer your benefits from a scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy (DIS) if you either (a) do not give or have not given any investment instructions for the account to the trustee of New scheme or (b) have given investment instructions for the account to invest benefits according to the DIS. Please approach the trustee of New Scheme to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in New Scheme, please also approach the trustee of New Scheme.

(11) If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the DIS of the scheme, you should be aware that the de-risking mechanism of the DIS starts at the age of 50. If the annual de-risking of your investment in the DIS and your transfer request take place at around the same time, the trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant trustee(s) if you wish to know the details of how the trustee(s) will handle these transactions.

(12) In order to prevent a third party from filling in incorrect information, please **DO NOT sign on a blank form**. After the completed election form has been received by the trustee of New Scheme, the administration procedures taken by the trustees may not be reversible.

(13) The number of fund units shown in your current MPF account on the date you elect to transfer may be different from that as of the date on which the fund units are redeemed. The trustee of Original Scheme will redeem all the fund units from the part(s) of benefits in your MPF account that you elect to transfer out on the date of redemption and transfer out the redeemed benefits. The trustee of New Scheme will subscribe fund units in accordance with your instructions. There will be a time-lag of about one to two weeks, during which your benefits will not be invested in any fund. During this period, fund prices may change due to market fluctuations, and there is a risk of a "sell low, buy high" scenario occurring.

(14) Please refer to the MPFA's publication available from the MPFA website (www.mpfa.org.hk) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment.

Enquiries

(15) Information about a scheme is set out in the offering document of that scheme. This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the relevant trustees for enquiries about account details and information on specific schemes or funds.

(16) For general enquiries regarding the ECA, you may contact the relevant trustees or the MPFA (email: mpfa@mpfa.org.hk or MPFA hotline: 2918 0102).

附件 4

TVC

第 MPF(S) - P(T)號表格

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)
Postal Address 8/F, AIA Financial Centre, 712 Prince Edward Road East,
郵寄地址: Kowloon, Hong Kong
香港九龍太子道東712 號友邦九龍金融中心8 樓
Customer Service Centre 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
客戶服務中心: 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

轉移可扣稅自願性供款的強積金累算權益（權益）須知

《強制性公積金計劃（一般）規例》（第 485A章）第149A及149B條

填寫本表格前，請先閱讀下列重要資料：

(1) **用詞定義：**
(a)「可扣稅自願性供款」—指根據《強制性公積金計劃條例》（《條例》）第 11A 條，存入可扣稅自願性供款帳戶的供款。
(b)「可扣稅自願性供款帳戶」—指任何人士根據《條例》第 11A 條在強積金註冊計劃（計劃）中開立，用作存入可扣稅自願性供款，以及持有成員由該等可扣稅自願性供款產生的權益及持有從另一可扣稅自願性供款帳戶轉移至該帳戶的權益的帳戶。
(c)「原計劃」—指轉出你的權益的計劃。
(d)「新計劃」—指轉入你的權益的計劃。

(2) 可扣稅自願性供款帳戶持有人可選擇把原計劃的可扣稅自願性供款帳戶內全部（而不是部分）權益轉移至新計劃的可扣稅自願性供款帳戶。在可扣稅自願性供款帳戶持有的權益不可轉移至供款帳戶或個人帳戶。

(3) 如欲從多於一個可扣稅自願性供款帳戶轉出權益，請就每個帳戶分別提交一份第 MPF(S)-P(T)號表格。

(4) 當你在原計劃的可扣稅自願性供款帳戶持有的權益被轉出後，你在原計劃的可扣稅自願性供款帳戶便會終止。

作出轉移選擇前的注意事項

(5) 在你決定把權益轉移至另一個計劃前，你應考慮所有相關因素，包括你的個人需要及以下因素：
(a) 受託人的服務（例如向計劃成員發出權益報表的頻密程度及每年可免費轉換基金的次數）；
(b) 基金的收費詳情請參閱強制性公積金計劃管理局（積金局 ）網站）；
(c) 計劃所提供的基金選擇，尤須注意計劃有否提供切合你需要的基金；及
(d) 如你現時投資於強積金保證基金，則從該保證基金轉出權益可能導致你不符合部分或所有保證條件，從而影響你享有保證的資格。有關詳情請查閱原計劃的要約文件，或向原計劃的受託人查詢。

(6) 在決定把權益轉移至新計劃前，你應盡量瞭解新計劃的內容。有關新計劃的詳情，請查閱新計劃的要約文件，該文件可於積金局網站及新計劃的受託人的網站下載，你也可向新計劃的受託人查詢詳情。

(7) 請確保你在新計劃已開立可扣稅自願性供款帳戶。否則，你在提交本表格之時或在此之前，須向新計劃的受託人提交成員參加計劃表格。有關開立可扣稅自願性供款帳戶的程序及所需文件，請向新計劃的受託人查詢。

(8) 如欲把權益從一個計劃轉移至另一個計劃，請留意轉入帳戶的權益將會如何投資。一般而言，如你(a)沒有或尚未就有關帳戶向新計劃的受託人給予任何投資指示；或(b)已就有關帳戶給予投資指示，要求把權益按照預設投資策略投資，則轉入該帳戶的權益將按照預設投資策略投資。如有需要，請向新計劃的受託人查詢詳情。如欲就新計劃 的帳戶更改或給予投資指示，亦請聯絡新計劃的受託人。

(9) 如你已年滿或快將年滿 50 歲，而現時你的權益是按照計劃的預設投資策略投資，請留意預設投資策略的降低投資風險機制，會由計劃成員年滿 50 歲開始運作。如計劃的受託人在預設投資策略下按年降低你的投資風險的時間，與接獲你的轉移權益申請的時間相當接近，該計劃的受託人將根據其運作程序及在符合《條例》規定的情況下，訂定處理降低風險及移權益的次序。如欲瞭解受託人如何處理該等交易，請向相關受託人查詢詳情。

(10) 為免被第三者填上不正確的資料，請勿在空白的表格上簽署。在新計劃的受託人收到已填妥的選擇表格後，之前由受託人採取的行政步驟未必能夠撤銷。

(11) 在你作出轉移選擇當日，你現有可扣稅自願性供款帳戶顯示的基金單位數目，或會與贖回基金單位當日的數目有所不同。原計劃的受託人將在贖回日贖回你選擇從可扣稅自願性供款帳戶轉出的權益的所有基金單位，以及轉出贖回權益。新計劃的受託人會按照你的指示買入基金單位，過程中會出現一至兩個星期的「投資空檔」。在此期間，你的權益不會投資於任何基金，假若這時基金價格因市場波動而出現變化，便有機會出現「低賣高買」的風險。

(12) 有關選擇計劃時各項考慮因素及強積金投資的潛在風險，請參閱積金局網站（www.mpfa.org.hk）的資料。

查詢

(13) 計劃的要約文件載有該計劃的資料，這些資料將有助你決定是否把權益轉移至該計劃。如欲查詢帳戶詳情及個別計劃或基金的資料，請聯絡相關受託人。

(14) 有關可扣稅自願性供款的一般查詢，可聯絡相關受託人或積金局（電郵地址：mpfa@mpfa.org.hk 或積金局熱線電話：2918 0102 ）。

To 致: AIA International Limited 友邦保險(國際)有限公司
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郵寄地址: Kowloon, Hong Kong

香港九龍太子道東712號友邦九龍金融中心8樓
Customer Service Centre 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
客戶服務中心: 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

TVC

第 MPF(S) - P(T)號表格

計劃成員可扣稅自願性供款轉移申請表

(適用於可扣稅自願性供款帳戶持有人把一個計劃(原計劃)的可扣稅自願性供款帳戶內的權益轉移至自選的另一個計劃(新計劃) 的可扣稅自願性供款帳戶)

《強制性公積金計劃(一般)規例》(第485A章)第149A及149B條

*(a) 填寫本表格前, 請先閱讀 **《轉移可扣稅自願性供款的強積金累算權益(權益)須知》**。*

(b) 你就此項轉移申請提供的個人資料, 將用作處理你的轉移申請。你提供的個人資料可能會為該目的而轉交相關受託人、相關服務提供者, 以及政府或規管機構, 包括強制性公積金計劃管理局(積金局)。

(c) 填妥本表格後, 請把第1頁及第2頁交予新計劃的受託人。

第 I 部: 計劃成員資料				
姓名 註1 *(與你的香港身分證上的姓名相同)*	姓氏:			
	名字:			
身分證明	香港身分證號碼:			
	護照號碼: *(本欄僅供沒有香港身分證的計劃成員填寫)*			
聯絡資料	住宅/日間聯絡電話號碼:	手提電話號碼:		
	電郵地址(如有):			
通訊地址	地區 / 國家(如非香港地區)	香港 / 九龍 / 新界 *(請刪去不適用者)*		
	街道	街道號碼	屋邨	
	大廈	座	樓層	室

第 II 部: 可扣稅自願性供款帳戶所屬原計劃的資料	
可扣稅自願性供款帳戶所屬原計劃的名稱 註2	

第 III 部: 可扣稅自願性供款帳戶所屬新計劃的資料	
本人選擇把原計劃的可扣稅自願性供款帳戶內的權益全部轉移至以下計劃:	
可扣稅自願性供款帳戶所屬新計劃的名稱 註3	❑友邦強積金優選計劃 ❑其它(請註明): _____

第 IV 部：授權及聲明

(a) 本人同意， 新計劃的受託人及積金局可為處理本人的轉移申請， 向相關受託人及相關服務提供 者披露本人就此項轉移申請提供的資料，或使該等機構 / 人士能夠取覽或披露該等資料。

(b) 本人謹此指示原計劃的受託人，在把本人於第 II 部所述的原計劃的可扣稅自願性供款帳戶內的權益全部轉移至新 計劃後，以及在該帳戶內並無剩餘款項的情況下，終止該可扣稅自願性供款帳戶。

(c) 本人確認及聲明：

- 本人已閱讀及明白《轉移可扣稅自願性供款的強積金累算權益（權益）須知》及註釋的內容，並自願選擇按照本表格轉移權益；及
- 盡本人所知所信，本表格所提供的資料均屬正確無訛且無缺漏。

(d) 我確認我已閱讀、明白及同意 友邦（信託）有限公司（「友邦信託」）的個人資料收集聲明（「該聲明」）。
我聲明及同意在本申請所載或友邦信託不時以任何方法收集、獲得、編製或持有的任何關於我的個人資料及關於我的帳戶或投資的其他資料，可根據該聲明收集及使用。我知悉及同意就該聲明所述目的及向有關各方轉移我的個人資料至香港境內或境外各方。該聲明符合相關守則及法規的最新版本可於此下載：https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAT-PICS-Traditional-Chinese.pdf，及可向友邦信託索取。

有關轉移權益至友邦強積金計劃之資訊 / 意見

(e) **本人聲明：（請選擇(a) 或 (b)，並於適當方格內填上✓號；如果沒有選擇，我們將假設閣下未獲任何註冊強積金中介人邀請、誘使或建議。）**

☐ (a) 本人未獲任何註冊強積金中介人邀請、誘使或建議轉移至友邦強積金計劃。

或

☐ (b) 本人獲註冊強積金中介人邀請、誘使或建議轉移至友邦強積金計劃。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。本人確認已收妥及閱讀新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)、主事中介人及附屬中介人資料及成員資料冊/退休樂單張/休悠樂單張/強積金可扣稅自願性供款計劃單張及「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。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新計劃，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了解有關詳情。 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。本人明白從原受託人轉移至新受託人過程 需時，過程中權益將不會作任何投資。本人聲明已完全明白所提供及討論之資料，包括有關轉移權益至友邦強積金計劃的意見之理據。向本人提供的意見乃基於以下理據：

（請於適當方格內填上✓號）

☐計劃及基金選擇 ☐基金管理費 ☐成員服務
☐其他，請註明：_____

本人謹此確認在銷售過程中，並無涉及：(i) 任何就新計劃/新計劃內成分基金優於本人正參與/投資的計劃/基金之聲 言；(ii) 任何與選擇特定成分基金相關的意見、邀約或誘使。本人的註冊強積金中介人已告知本人若不選擇任何成分基金，供款(包括轉入的款項)便會自動按強積金預設投資策略進行投資。本人的註冊強積金中介人已向本人解釋強積金預設投資策略的特點，如自動降低風險及設有收費管控。

需要特別照顧的客戶

只有你獲註冊強積金中介人邀請、誘使或建議參加友邦強積金計劃，本部分始適用。

(f) 根據《強制性公積金計劃條例》第 34ZL 條，本人聲明：**（請選擇(a) 或 (b)，並於適當方格內填上 ✓號）**

☐ (a) 本人並非視障或有其他障礙及/或本人的教育程度並非為小學或以下，本人能夠自行作出重要決定*。**或**
☐ (b) 本人因視障或其他障礙及/或本人的教育程度為小學或以下，本人無法自行作出重要決定* **（請於適當方格內填上✓號**

☐ 本人不願意銷售過程由見證人陪同。

或

☐本人願意銷售過程由以下見證人陪同：**（請於適當方格內填上✓號）**
☐ 本人的同伴。 **或** ☐ 另一名中介人或員工(即第三者)。

見證人姓名	見證人簽署	日期（年 / 月 / 日）

*根據強積金法例的定義，指(i) 選擇一項特定成分基金；(ii) 進行涉及轉移一項保證基金的權益轉移；(iii) 提早從強積金制度中提取權益；或(iv) 向一個/項特定註冊計劃/成分基金作自願性供款。

簽署 [註 4]	日期（*年 / 月 / 日*）

~填妥本表格後，請把第 1 頁及第 2 頁交予新計劃的受託人~

Intermediary

Intermediary/ Agent Code : ⌊⌊⌊⌊⌊⌊⌋ **Agency Code :** ⌊⌊⌊⌊⌊⌋

Intermediary/ Agent Name : ⌊_____⌋ **Staff code/ Name :** ⌊_____⌋ **Received date & time :** _____

By completing the intermediary information, I confirm that I have witnessed the signature and verified the original HKID card/ Passport copy of the member as stated on the document attached to this transfer application (if applicable).

To 致: AIA International Limited 友邦保險(國際)有限公司
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香港九龍太子道東712 號友邦九龍金融中心8 樓
Customer Service Centre 客戶服務中心: 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

TVC

簽名核實證明文件

(適用於經中介人遞交之可扣稅自願性供款轉移指示及/或設立新可扣稅自願性供款賬戶申請)

計劃名稱 :友邦強積金優選計劃

聲明

本人確認在此提供的香港身份證/護照是原件的副本，而簽名是本人的簽名。本人要求任何本人作為強制性公積 金計劃(強積金)成員的受託人處理與這文件一同遞交的轉移申請。本人同意及明白在此提供的簽名將僅用於目 前的轉移申請，而並不會更改任何本人過去曾經提供強積金受託人的簽名記錄。

本人亦確認及同意強積金受託人以以下香港身份證/護照副本為本人設立新的可扣稅自願性供款賬戶(如適用)。

成員簽署

請 在 此 貼 上 香 港 身 份 證 / 護 照 副 本

註 釋

(1) 如你沒有香港身分證，請填上你在護照上的姓名。

(2) 如你沒有提供原計劃名稱，或所提供的資料有誤，則此項轉移申請或不獲處理。你可於參與通知或周年權益報表獲取有關資料。如有疑問，請聯絡你原計劃的受託人。有關強積金計劃的名稱，可參閱積金局網站（ www.mpfa.org.hk）的資料。

(3) 如你沒有提供新計劃名稱，或所提供的資料有誤，則此項轉移申請或不獲處理。如有疑問，請聯絡你新計劃的受託人。有關計劃的名稱，可參閱積金局網站（www.mpfa.org.hk）的資料。

(4) 你的簽署必須與你之前給予原計劃的受託人的簽署式樣相同。請注意，若本表格上的簽署與你之前給予原計劃的受託人的簽署式樣不符， 有關轉移或不獲處理。如有疑問，請聯絡你原計劃的受託人。

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Member Hotline 成員熱線: 2200 6288

附件 4

TVC

FORM MPF(S) - P(T)

NOTES TO TRANSFER OF MPF ACCRUED BENEFITS (BENEFITS) OF TAX DEDUCTIBLE VOLUNTARY CONTRIBUTIONS

Sections 149A and 149B of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)

*Please read the following **important notes** before completing this Form.*

(1) **Definition of terms:**

(a) "Tax Deductible Voluntary Contributions" (TVC) – refer to contributions that are paid into a TVC account under section 11A of the Mandatory Provident Fund Schemes Ordinance (the Ordinance).

(b) "TVC account" - an account in an MPF registered scheme (scheme) opened by a person under section 11A of the Ordinance and into which TVC are paid and in which the member's benefits derived from those TVC and the TVC transferred to the account from another TVC account are held.

(c) "Original Scheme" – the scheme from which your benefits are to be transferred.

(d) "New Scheme" – the scheme to which your benefits are to be transferred.

(2) A TVC account holder may make an election to transfer ALL (and not part of) benefits in the TVC account in the Original Scheme to the TVC account in the New Scheme. Benefits held in a TVC account cannot be transferred to a contribution account or personal account.

(3) If you wish to transfer benefits from more than one TVC account, you should submit a separate Form MPF(S)-P(T) for each of those accounts.

(4) After your benefits held in the TVC account are transferred from the Original Scheme, your TVC account in the Original Scheme will be terminated.

Reminders before making an election to transfer

(5) Before you decide to transfer your benefits to another scheme, you should take into consideration all relevant factors, including your personal needs and the following factors:

(a) services of the trustees (e.g. frequency of issuance of benefit statement to scheme members; number of free fund switchings per year);

(b) fees and charges of the funds (for detailed information, please refer to the website of the Mandatory Provident Fund Schemes Authority (MPFA));

(c) the range of fund choices offered by the schemes and in particular whether there are funds available that match what you need; and

(d) if you are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that guaranteed fund may result in some or all of the guarantee conditions not being satisfied; thus affecting your entitlement to the guarantee. Please check the offering document of the Original Scheme or consult the trustee of the Original Scheme for details.

(6) Before deciding to transfer benefits to the New Scheme, you should try to understand as much as you can about the New Scheme. Please read the offering document of the New Scheme, which can be found on the website of the MPFA, website of the trustee of the New Scheme or contact the trustee of the New Scheme.

(7) Please ensure that you have a TVC account in the New Scheme. Otherwise, you have to submit a membership enrolment form before or at the same time you submit this Form to the trustee of the New Scheme. Please consult your trustee of the New Scheme for the procedures and required documents for setting up a TVC account.

(8) If you wish to transfer your benefits from a scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy (DIS) if you either (a) do not give or have not given any investment instructions for the account to the trustee of the New Scheme or (b) have given investment instructions for the account to invest benefits according to the DIS. Please approach the trustee of the New Scheme to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in the New Scheme, please also approach the trustee of the New Scheme.

(9) If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the DIS of the scheme, you should be aware that the de-risking mechanism of the DIS starts at the age of 50. If the annual de-risking of your investment in the DIS and your transfer request take place at around the same time, the trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Ordinance. Please consult the relevant trustee(s) if you wish to know the details of how the trustee(s) will handle these transactions.

(10) In order to prevent a third party from filling in incorrect information, please **DO NOT sign on a blank form**. After the completed election form has been received by the trustee of the New Scheme, the administration procedures taken by the trustees may not be reversible.

(11) The number of fund units shown in your current TVC account on the date you elect to transfer may be different from that as of the date on which the fund units are redeemed. The trustee of the Original Scheme will redeem all the fund units from your TVC account that you elect to transfer out on the date of redemption and transfer out the redeemed benefits. The trustee of the New Scheme will subscribe fund units in accordance with your instructions. There will be a time-lag of about one to two weeks, during which your benefits will not be invested in any fund. During this period, fund prices may change due to market fluctuations, and there is a risk of "selling low, buying high".

(12) Please refer to the MPFA's website (www.mpfa.org.hk) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment.

Enquiries

(13) Information about a scheme is set out in the offering document of the scheme. This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the relevant trustees for enquiries about account details and information on specific schemes or funds.

(14) For general enquiries regarding the TVC, you may contact the relevant trustees or the MPFA (email: mpfa@mpfa.org.hk or MPFA hotline: 2918 0102).

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)
Postal Address 8/F, AIA Financial Centre, 712 Prince Edward Road East,
郵寄地址: Kowloon, Hong Kong

香港九龍太子道東712 號友邦九龍金融中心8 樓
Customer Service Centre 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
客戶服務中心: 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

TVC

FORM MPF(S) - P(T)

SCHEME MEMBER'S REQUEST FOR TRANSFER OF TAX DEDUCTIBLE VOLUNTARY CONTRIBUTIONS (TVC)

(for a TVC account holder to transfer benefits from the TVC account in a scheme (Original Scheme) to the TVC account in another scheme (New Scheme) elected by the member)

Sections 149A and 149B of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)

*(a) Please read the **"Notes to Transfer of MPF Accrued Benefits (Benefits) of Tax Deductible Voluntary Contributions"** before you complete this Form.*
(b) The personal data to be supplied in support of this election of transfer are to be used for processing your election of transfer. The personal data you supply may, for such purpose, be transferred to the trustee(s) concerned, the relevant service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority (MPFA).
(c) Please send pages 1 and 2 of this Form to the trustee of the New Scheme after completion.

SECTION I: SCHEME MEMBER DETAILS

Name[1] (*as shown on your Hong Kong Identity (HKID) Card*)	Surname:			
	Other Name:			
Identification	HKID Card No.:			
	Passport No.: (*ONLY for scheme member without HKID Card*)			
Contact Details	Home/ Daytime Phone No..:		Mobile Phone No.:	
	Email Address (if any):			
Correspondence Address	Flat/Room	Floor	Block	Building
	Estate		Street No.	Street
	Hong Kong / Kowloon / New Territories (*delete whichever is inappropriate*)		District / Country (if not Hong Kong)	

SECTION II: ORIGINAL SCHEME INFORMATION OF THE TVC ACCOUNT

Name of the Original Scheme[2] of the TVC Account	

SECTION III: NEW SCHEME INFORMATION OF THE TVC ACCOUNT

I elect to transfer all benefits in the TVC account in the Original Scheme to the following scheme:

Name of the New Scheme[3] of the TVC Account	❑AIA MPF - Prime Value Choice : ❑Others (please specify) : _____

SECTION IV. AUTHORISATION AND DECLARATION

(a) I hereby give consent to the trustee of the New Scheme and the MPFA to disclose information supplied by me in support of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

(b) I hereby give the trustee of the Original Scheme an instruction to terminate my TVC account in the Original Scheme as referred to in Section II upon transferring all benefits to the New Scheme and there is no residual balance in the said account.

(c) I confirm and declare that:

- I have read and understood the Notes to Transfer of MPF Accrued Benefits (Benefits) of Tax Deductible Voluntary Contributions and the Explanatory Notes, and have voluntarily elected to transfer my benefits in accordance with this Form; and
- To the best of my knowledge and belief, the information given in this Form is correct and complete.

(d) I confirm that I have read, understood and agreed to the Personal Information Collection Statement of AIA Company (Trustee) Limited ("AIA Trustee") (the "PICS"). I declare and agree that any personal data and other information relating to me or my account(s) or investment(s) contained in this application or collected, obtained, compiled or held by AIA Trustee by any means from time to time may be collected and utilized in accordance with the PICS. I acknowledge and consent to the transfer of my personal data to parties within or outside Hong Kong for the purposes and to the transferees as set out in the PICS. The updated version of the PICS which complies with the relevant rules and regulations is available for download: https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAT-PICS-English.pdf, and is also available upon request.

Information / Advice relating to transfer of benefits to the AIA MPF Scheme

(e) **I declare that: (please select (a) OR (b) and ✓ as appropriate; if no selection is made, we will assume that you HAVE NOT been invited, induced or advised by any registered MPF intermediaries)**

☐ (a) I HAVE NOT been invited, induced or advised by any registered MPF intermediaries to transfer to the AIA MPF Scheme.

OR

☐ (b) I have been invited, induced or advised by one or more registered MPF intermediaries to transfer to 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. 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 and Member's Guide/ Happy Retirement Savings Programme leaflet/ AIA MPF Personal Account leaflet/AIA MPF Tax Deductible Voluntary Contribution Programme leaflet applicable to the New 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. 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 New 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). 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 trustee to new trustee, there will be a time lag during which the benefits will not be invested. I declare that I fully understand the information provided and discussed, including the rationale underlying the advice relating to transfer of benefits to the AIA MPF Scheme. The advice given to me is based on the following rationale(s):

(please ✓ the appropriate box(es))

☐ Scheme and fund choices ☐ Fund management fees ☐ Member services

☐ Other, please specify: _____

I hereby confirm that the sales process does not involve: (i) any claims that the New Scheme/constituent fund under the New Scheme is preferred over the scheme/fund I participated/invested in; (ii) any advice, invitation or inducement relating to choosing a particular constituent fund. I have been informed by my registered MPF intermediary that if no constituent fund is selected, all contributions (including transfer-in monies) will be automatically invested according to the MPF Default Investment Strategy (the "DIS"). My registered MPF intermediary has explained to me the key features of the DIS, such as its automatic de-risking features and fee controls.

Clients with special needs

This part is applicable only if you have been invited, induced or advised by any registered MPF intermediaries to transfer to the AIA MPF Scheme.

(f) Pursuant to section 34ZL of the Mandatory Provident Fund Schemes Ordinance, I declare that: **(please select (a) OR (b) and ✓ as appropriate)**

I AM NOT visually or otherwise impaired and/or my education level IS NOT primary or below such that I can make a key decision*

☐ (a) independently. **OR**

☐ (b) I am visually or otherwise impaired and/or my education level is primary or below such that I cannot make a key decision* independently, and (please ✓ the appropriate box)

- ☐ I would not like to be accompanied by a witness during the sales process. or
- ☐ I would like to be accompanied by the following witness during the sales process: **(please ✓ the appropriate box)**
  - ☐ my companion. **OR** ☐ another intermediary or member of staff (i.e. a third party).

Name of witness	Signature of witness	Date (yyyy/mm/dd)

* As defined in the MPF legislation, it refers to: (i) choosing a particular constituent fund; (ii) making a transfer that would involve a transfer out of a guaranteed fund; (iii) making an early withdrawal of benefits from the MPF system; or (iv) making voluntary contributions into a particular registered scheme/constituent fund.

Signature[4]	Date (*YYYY/MM/DD*)

~ Please send pages 1 and 2 of this Form to the trustee of the New Scheme after completion ~

For Intermediary Use

Intermediary/ Agent Code ☐☐☐☐☐☐ **Agency Code** ☐☐☐☐☐☐

Intermediary/ Agent Name _____ **Staff code/ Name** _____ **Received date & time** _____ yyyy / mm / dd

By completing the intermediary information, I confirm that I have witnessed the signature and verified the original HKID card/ Passport copy of the member as stated on the document attached to this transfer application (if applicable).

To 致: AIA International Limited 友邦保險(國際)有限公司 **TVC**
(Incorporated in Bermuda with limited liability 於百慕達註冊成立之有限公司)
Postal Address 8/F, AIA Financial Centre, 712 Prince Edward Road East,
郵寄地址: Kowloon, Hong Kong

香港九龍太子道東712 號友邦九龍金融中心8 樓
Customer Service Centre 12/F, AIA Tower, 183 Electric Road, North Point, Hong Kong
客戶服務中心: 香港北角電器道183號友邦廣場12樓
Member Hotline 成員熱線: 2200 6288

SIGNATURE VERIFICATION

(Applicable for transfer request of Tax Deductable Voluntary Contributions submitted through intermediaries and/or new Tax Deductable Voluntary Contributions Account set up)

Scheme Name : AIA MPF – Prime Value Choice

Declaration

I confirm that the Hong Kong Identity Card/Passport provided is a copy of the original and my signature is my own signature. I request the trustee of any Mandatory Provident Fund ("MPF") schemes in which I am a member to process the transfer application(s) submitted together with this document. I agree and understand that my signature provided here would be used for the current application(s) only and would not change any of my signature record which I have provided to the MPF trustee previously.

I also confirm and agree the MPF trustee to use this Hong Kong Identity Card/Passport copy for setting up my new Tax Deductable Voluntary Contributions Account (if applicable).

Member's Signature

Please paste your HKID Card / Passport copy here

Explanatory Notes

1. If you do NOT possess a HKID Card, please fill in your name as shown on your passport.

2. The transfer election may not be processed if the Name of the Original Scheme is not provided or is incorrect. This information can be found in your notice of participation or annual benefit statement. If you are in doubt, please contact your trustee of the Original Scheme. Please refer to the MPFA's website (www.mpfa.org.hk) for the name of schemes.

3. The transfer election may not be processed if the Name of the New Scheme is not provided or is incorrect. If you are in doubt, please contact your trustee of the New Scheme. Please refer to the MPFA's website (www.mpfa.org.hk) for the name of schemes.

4. The signature must be the same as your specimen signature previously given to your trustee of the Original Scheme. Please note that the transfer may not be processed if the signature provided in this Form does not match the specimen signature previously given to your trustee of the Original Scheme. If you are in doubt, please contact your trustee of the Original Scheme.