填寫積金易紙張表格不求人（紙張版本）

2025.11版本

友邦機密及專利資料。嚴禁分發。

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友邦機密及專利資料。嚴禁分發。

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友邦強積金優選計劃僱主申請表格(ERA) 範例及常見錯誤與建議

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

eMPF 積金易

AIA MPF – PRIME VALUE CHOICE – EMPLOYER PARTICIPATION AGREEMENT
友邦強積金優選計劃 – 僱主參與協議

ERA

Go Green with E-Submission for Efficiency
為更有效率請使用電子表格
eMPF Web Portal 積金易網上平台

Internal use only 內部專用
eMPF Received Date:
ERA

Important Notes 重要事項：

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

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

2. Please read the following before completing this agreement: 填寫本協議前，請細閱以下部分：
   (i) the MPF Scheme Brochure and the Key Scheme Information Document ("KSID") of the Scheme. You can download the MPF Scheme Brochure and the KSID by visiting the website of MPFA (https://www.mpfa.org.hk/assets/OD/MT00172_AIA_MPF_-_Prime_Value_Choice_EN.pdf) or scanning the QR code as shown in Part A below; and 本計劃之強積金計劃說明書及主要計劃資料文件。你可透過瀏覽積金局的網頁（https://www.mpfa.org.hk/assets/OD/MT00172_AIA_MPF_-_Prime_Value_Choice_CH.pdf）或掃描於下列 A 部分所顯示的二維碼下載強積金計劃說明書及主要計劃資料文件；及
   (ii) Part F "Personal Information Collection Statement" ("PICS") of the eMPF Platform and the Scheme; and F 部分積金易平台及本計劃《收集個人資料聲明》（「聲明」）；及
   (iii) the following Important Notes. 以下重要事項。
3. If the employer is in doubt about the contents of this agreement, the MPF Scheme Brochure, the KSID or the trust deed ("Trust Deed") of the Scheme, the employer should consult his / her solicitor, accountant or financial advisor. 如僱主對本協議、本計劃之強積金計劃說明書、主要計劃資料文件或信託契約（或稱信託契據）的內容有疑問，應諮詢其律師、會計師或財務顧問。
4. Please complete this agreement in BLOCK LETTERS with black or blue pen and tick the appropriate box(es). 請用黑色或藍色筆以正楷填寫本協議，並在適當空格內填上剔號。
5. Please countersign beside any amendment with the same signature as shown in Part G Authorization and Declaration. 如有刪改，請於更改位置旁加簽而該簽署必須與 G 部分授權及聲明的簽署相符。
6. The eMPF Platform will process this application upon receipt of this completed agreement and all relevant supporting document(s) (if any). If there are any omissions (including but not limited to missing page(s) / supporting document(s)), the eMPF Platform may not be able to process this application. 積金易平台收到完整協議及相關證明文件（如有）後，才會處理有關申請。如有遺漏（包括但不限於頁數／證明文件不齊全），積金易平台可能未能執行此申請。
7. "Participating Employer" means the company or individual whose details are set out in Part A of this agreement. 「參與僱主」指其資料列載於本協議 A 部分的公司或個人。
8. The information of the connected person(s) (including but not limited to contact person(s) / scheme authorized person(s)) is collected in their official capacities. 關連人士的資料（包括但不限於聯絡人／計劃獲授權人士）乃因應其職務身分而收集。
9. The employer particulars, including but not limited to company name, business registration no., jurisdiction of incorporation or organisation, registered address, principal business address and correspondence address, etc., provided in this agreement and other related documents will form part of tax residency self-certification for the entity / sole proprietor specified in Part A below. 於本協議提供的僱主資料，包括但不限於公司名稱、商業登記證號碼、公司或機構註冊所在的司法管轄區、註冊地址、主要業務地址及通訊地址等及其他相關文件，將會成為下列 A 部分中指定的實體／獨資經營者的稅務居民身分自我證明的一部分。
10. Information provided in this agreement will be updated by the eMPF Platform for the entity / sole proprietor for the purpose of Automatic Exchange of Financial Account Information ("AEOI") and Common Reporting Standard ("CRS"). The eMPF Platform will update the jurisdiction of tax residency to all your MPF account(s) maintained in the eMPF Platform. 積金易平台會將本協議所提供的資料用作更新實體／獨資經營者自動交換財務帳戶資料及「共同匯報標準」的用途。積金易平台將會更新你於積金易平台保存的所有強積金帳戶的稅務居民所在司法管轄區。

A. EMPLOYER PARTICULARS 僱主資料

(1) Scheme Details 計劃資料

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

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

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

(2) Company Name of Participating Employer 參與僱主公司名稱 (As shown on registration document 必須與註冊證明文件相同)

English **ABC Company** ("Participating Employer")

中文 **ABC 公司**（「參與僱主」）

VC-ERA-25V1

友邦機密及專利資料。嚴禁分發。

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選擇該公司合適選項

(3) Registration Type 註冊類別

- [x] (i) (BR) Business Registration ' 商業登記 '
- [ ] (ii) (ED) Education Bureau 教育局
- [ ] (iii) (IR) Inland Revenue Department (Charitable Organisations) 稅務局 (慈善團體)
- [ ] (iv) (SO) Societies Office of the HK Police Force (Societies) 香港警務處社團事務處 (社團)
- [ ] (v) (TU) Registry of Trade Unions of the Labour Department 勞工處職工會登記局
- [ ] (vi) Others, please specify 其他，請註明 (e.g. Private driver, Owners' corporations, Office of Legislative Councilor 例如：私人司機、業主立案法團、立法會議員辦事處)

Business / Other Registration No. ' 商業／其他註冊證號碼 ' 1 2 3 4 5 6 7 8 9 9

Branch No. ' 分行號碼 ' 9 0 0

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

(4) Incorporation Details 公司註冊資料 (Applicable to limited company only 只適用於有限公司)

(i) Certificate of Incorporation No. 註冊證明書編號 1 2 3 4 5 6 7 8 9 0 0

(ii) Date of Incorporation 註冊日期 2 8 / 1 1 / 2 0 2 4 DD / MM / YYYY 日／月／年

(iii) Place of Incorporation 註冊地點 香港

選擇該公司合適選項

(5) Organisation Type 機構類別

- [ ] (i) Limited Partnership 有限合夥
- [ ] (ii) Partnership 合夥經營
- [x] (iii) Private Limited Company 私人有限公司
- [ ] (iv) Public Limited Company 公眾有限公司
- [ ] (v) Sole Proprietorship 獨資經營
- [ ] (vi) Others, please specify 其他，請註明

選擇該公司合適選項

(6) Nature of Business 業務性質

- [ ] (i) Catering 餐飲業
- [ ] (ii) Cleaning 清潔業
- [ ] (iii) Community / Social / Personal Services 社區／社會／個人服務業
- [ ] (iv) Construction 建造業
- [ ] (v) Finance / Insurance / Real Estate / Business Services 金融／保險／地產／商用服務
- [ ] (vi) Hairdressing and Beauty 理髮及美容業
- [ ] (vii) Manufacturing 製造業
- [ ] (viii) Security Guard Services 保安服務業
- [ ] (ix) Transportation 運輸業
- [x] (x) Wholesale / Retail / Import and Export Trades 批發／零售／出入口貿易
- [ ] (xi) Others, please specify 其他，請註明：

(7) No. of Employees Joining The Scheme 參加本計劃的僱員人數 5 0

友邦機密及專利資料。嚴禁分發。

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(8) Registered Address 註冊地址 (P h OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室: 5 | Floor 層數: 9 | Block 座: 二座

Building / Estate 大廈／屋苑: 建偉工業大廈

Street (Street No. and Street Name) 街道 (街號及街道名稱): 建偉路183號

District Area 區域: 灣仔

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 * | Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

(9) Principal Business Address 主要業務地址

(If different from the above Registered Address, please provide either English OR Chinese address, P.O. Box address is not accepted 如與上述註冊地址不同，請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室 | Floor 層數 | Block 座

Building / Estate 大廈／屋苑

Street (Street No. and Street Name) 街道 (街號及街道名稱)

District Area 區域

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 * | Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

(10) Correspondence Address 通訊地址

(If different from the above Principal Business Address, please provide either English OR Chinese address 如與上述主要業務地址不同，請提供英文或中文地址)

Flat / Room 單位／室 | Floor 層數 | Block 座

Building / Estate 大廈／屋苑

Street (Street No. and Street Name) 街道 (街號及街道名稱)

District Area 區域

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 * | Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

友邦機密及專利資料。嚴禁分發。

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B. CONNECTED PERSON DETAILS 關連人士資料

(1) Scheme Authorized Person(s) 計劃獲授權人

- A Scheme Authorized Person is authorized to act on behalf of the Participating Employer to handle all matters associated with the Participating Employer's participation in the Scheme, including but not limited to give instructions and grant the access right to other user(s) in eMPF Employer Portal to handle daily administration of the Payroll Group(s) in connection therewith. 計劃獲授權人獲授權代表參與僱主處理與本計劃有關的一切事宜，包括但不限於給予指示及授予其他用戶登入強金易僱主平台的使用權限，以處理相關工資組別的日常行政事宜。
- If the space provided below is insufficient, please provide information on photocopies

計劃獲授權人可為管理強積金計劃的員工設定不同的用戶權限

(i) Scheme Authorized Person 1 計劃獲授權人 1

a. **Title 稱謂** ☑ Mr先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

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

Surname in English 英文姓氏: CHAN

Given Name in English 英文名字: TAI MAN

Name in Chinese 中文姓名 (Surname 姓氏): 陳 (Given Name 名字): 大文

c. **Job Title 職銜**: 人事部總經理

d. **Identification 身分證明**

如需使用積金易電子平台，必須持有香港身份證

☑ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼: Y1234567

e. **Date of Birth 出生日期**: 28/08/1988 DD / MM / YYYY 日／月／年

f. **Nationality 國籍**: 中國

g. **Residential Address 居住地址** (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室: C

Floor 樓層: 30

Block 座: 2

Building / Estate 大廈／屋苑: 開心大廈

Street (Street No. and Street Name) 街道 (街號及街道名稱): 開心路10號

District Area 區域: 上環

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *:

Country * / Region * 國家 * ／地區 *:

Postal code * 郵政編號 *:

* Applicable to address outside Hong Kong only 只適用於香港以外地址

h. **Mobile Phone No. 手提電話號碼**: 852 62342345 (Country / Area Code * 國家／地區編號 *)

i. **Secondary Telephone No. 第二聯絡電話號碼**: (Country / Area Code * 國家／地區編號 *)

* If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 如未有提供國家／地區編號，將預設為「香港 (852)」。

j. **Email Address 電郵地址** (Email from the eMPF Platform may include important information for MPF account of the company. Please ensure access security for the email address provided. 積金易平台發出的電郵可能載有你公司強積金帳戶的重要資料，請確保提供的電郵地址被妥善使用。)

chantaiman123@gmail.com

友邦機密及專利資料。嚴禁分發。

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k. **Scheme Authorized Person's Signature Specimen 計劃獲授權人簽署樣式**

Peter Chan

計劃獲授權人提供簽署樣式

(ii) Scheme Authorized Person 2 計劃獲授權人 2 (If any 如有)

a. **Title 稱謂** ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

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

Surname in English 英文姓氏

Given Name in English 英文名字

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

c. **Job Title 職銜** _____

d. **Identification 身分證明**

☐ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼

e. **Date of Birth 出生日期** / / DD / MM / YYYY 日／月／年

f. **Nationality 國籍** _____

g. **Residential Address 居住地址** (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室 Floor 樓數 Block 座

Building / Estate 大廈／屋苑

Street (Street No. and Street Name) 街道 (街號及街道名稱)

District Area 區域

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 * Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

h. **Mobile Phone No. 手提電話號碼** (Country / Area Code * 國家／地區編號 *) *

i. **Secondary Telephone No. 第二聯絡電話號碼** (Country / Area Code * 國家／地區編號 *)

* If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 如未有提供國家／地區編號，將預設為「香港 (852)」。

j. **Email Address 電郵地址** (Email from the eMPF Platform may include important information for MPF account of the company. Please ensure access security for the email address provided. 積金易平台發出的電郵可能載有你公司強積金帳戶的重要資料，請確保提供的電郵地址被安全使用。)

友邦機密及專利資料。嚴禁分發。

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k. **Scheme Authorized Person's Signature Specimen 計劃獲授權人簽署樣式**

可委任其他同事作為日常行政聯絡人，
公司可自行決定

(2) Company Primary Contact Person for Daily Administration 公司日常行政的主要聯絡人
The information provided will be used by the eMPF Platform to contact the Company Primary Contact Person on daily administration issues related to the Scheme. Correspondence (including but not limited to e-notification (if any)) in relation to the Scheme will be addressed to the Company Primary Contact Person listed below. 積金易平台會以下列所提供資料，就本計劃日常行政事宜聯絡公司主要聯絡人。有關本計劃內的信件 (包括但不限於電子通訊 (如有)) 將會寄出予公司主要聯絡人。

Please choose ONE of the options below only. 請只揀選下列其中一項。

☑ (i) Same as Scheme Authorized Person 1 與計劃獲授權人 1 相同

☐ (ii) Same as Scheme Authorized Person 2 與計劃獲授權人 2 相同

☐ (iii) Company Primary Contact Person Details are as follows 公司主要聯絡人資料如下：

a. **Title 稱謂** ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

b. **Name 姓名**

Surname in English 英文姓氏

Given Name in English 英文名字

Name in Chinese 中文姓名 (Surname 姓氏) (Given Name 名字)

c. **Job Title 職銜**

d. **Mobile Phone No. 手提電話號碼**
(To provide up-to-date MPF account information to your company, this field is mandatory. 為提供最新強積金帳戶資料予你公司，此欄位必須填寫。)
(Country / Area Code 國家／地區編號 ▲)
▲ SMS (if applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊 (如適用) 只發送至香港手提電話號碼。如未有提供國家／地區編號，將預設為「香港 (852)」。

e. **Secondary Telephone No. 第二聯絡電話號碼**
(Country / Area Code 國家／地區編號 ▲)

f. **Email Address 電郵地址** (Email from the eMPF Platform may include important information for MPF account of the company. Please ensure access security for the email address provided. 積金易平台發出的電郵可能載有你公司強積金帳戶的重要資料，請確保提供的電郵地址的安全使用。)

(3) Company Secondary Contact Person for Daily Administration 公司日常行政的第二聯絡人 (If any 如有)
The eMPF Platform will contact the Company Secondary Contact Person on daily administration issues if we cannot reach the Company Primary Contact Person. 如未能聯絡公司主要聯絡人，積金易平台會聯絡公司第二聯絡人跟進日常行政事宜。

Please choose ONE of the options below only. 請只揀選下列其中一項。

☐ (i) Same as Scheme Authorized Person 1 與計劃獲授權人 1 相同

☐ (ii) Same as Scheme Authorized Person 2 與計劃獲授權人 2 相同

☐ (iii) Company Secondary Contact Person Details are as follows 公司第二聯絡人資料如下：

a. **Title 稱謂** ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

b. **Name 姓名**

Surname in English 英文姓氏

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

Given Name in English 英文名字

Name in Chinese 中文姓名 (Surname 姓氏) (Given Name 名字)

c. **Job Title 職銜**

d. **Mobile Phone No. 手提電話號碼** (Country / Area Code * 國家／地區編號 *) *

e. **Secondary Telephone No. 第二聯絡電話號碼** (Country / Area Code * 國家／地區編號 *)

* If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 如未有提供國家／地區編號，將預設為「香港 (852)」。

f. **Email Address 電郵地址** (Email from the eMPF Platform may include important information for MPF account of the company. Please ensure access security for the email address provided. 積金易平台發出的電郵可能載有你公司強積金帳戶的重要資料，請確保提供的電郵地址被安全使用。)

(4) Director(s) / Partner(s) / Sole Proprietor / Controller / Ultimate Owner 董事／合夥人／獨資經營者／管理人／最終擁有人 ("Principal(s)" 「主事人」)

- Applicable to Corporation / Partnership / Sole proprietorship / other types of organisation. 適用於法團／合夥經營／獨資經營／其他類別的機構。
- For Partnership, please list out, at least, two partners' information. 如屬合夥經營，請至少列出兩位合夥人資料。
- If the space provided below is insufficient, please provide information on photocopies of Part B(4). 如下列位置不敷應用，請影印 B(4) 部分以提供資料。

(i) Principal No.1's Particulars 第一位主事人資料

a. **Title 稱謂** ☑ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

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

Surname in English 英文姓氏: CHAN

Given Name in English 英文名字: SIU MING

Name in Chinese 中文姓名 (Surname 姓氏): 陳 (Given Name 名字): 小明

c. **Identification 身分證明**

☑ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼: Z765432(1)

d. **Date of Birth 出生日期**: 20/09/1990 DD / MM / YYYY 日／月／年

e. **Nationality 國籍**: 中國

f. **Residential Address 居住地址** (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室: B

Floor 樓數: 30

Block 座: 1

Building / Estate 大廈／屋苑: 快樂大廈

Street (Street No. and Street Name) 街道 (街號及街道名稱): 快樂路11號

District Area 區域: 上環

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *

Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

(ii) Principal No.2's Particulars 第二位主事人資料 (If applicable 如適用)

a. Title 稱謂 ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

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

Surname in English 英文姓氏

Given Name in English 英文名字

Name in Chinese 中文姓名 (Surname 姓氏) (Given Name 名字)

c. Identification 身分證明

☐ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼

d. Date of Birth 出生日期 / / DD / MM / YYYY 日／月／年

e. Nationality 國籍

f. Residential Address 居住地址 (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室

Floor 層數

Block 座

Building / Estate 大廈／屋苑

Street (Street No. and Street Name) 街道 (街號及街道名稱)

District Area 區域

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *

Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

(5) Beneficial Owner(s) 實益擁有人

如發行的股本或該法團成員大會投票權少於 25%，則不用填寫以下部分 (5)

- A beneficial owner in relation to a corporation is an individual who directly or indirectly owns or controls 25% or more of the issued share capital of the corporation or voting rights at general meetings of the corporation or who exercises ultimate control over the management of the corporation, or if the corporation is acting on behalf of another person, means the other person. 與法團有關的實益擁有人即直接或間接擁有或控制該法團已發行的股本或該法團成員大會投票權 25% 或以上或行使對該法團的管理最終控制權的人士，或如該法團代表另一位人士，則指該人士。
- If the space provided below is insufficient, please provide information on photocopies of Part B(5). 如下列位置不敷應用，請影印 B(5) 部分以提供資料。
- If information relating to the Beneficial Owner(s) needs to be updated in the future, please submit "Employer Information Change Form" to provide the updated information as soon as practicable and in any case within 30 days of change. 如未來需要更改實益擁有人的資料，請在合理而切實可行範圍內儘快及在任何情況下須於資料更改後 30 天內遞交「僱主更改資料表格」以提供更新資料。

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

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

Surname in English 英文姓氏 CHAN

Given Name in English 英文名字 SIU MING

Name in Chinese 中文姓名 (Surname 姓氏) 陳 (Given Name 名字) 小明

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

(iii) Identification 身分證明

☑ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼: Z765432(1)

(iv) Date of Birth 出生日期: 20/09/1990 DD / MM / YYYY 日／月／年

(v) Nationality 國籍: 如: 中國香港 / 中國內地 / 美國 / 澳洲

小提示：如客戶同時擁有香港地區以外的稅務居民身份，需填寫E(2)稅務資料

(vi) Residential Address 居住地址 (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室: B

Floor 層數: 30

Block 座: 1

Building / Estate 大廈／屋苑: 快樂大廈

Street (Street No. and Street Name) 街道 (街號及街道名稱): 快樂路11號

District Area 區域: 上環

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆

Country ◆ / Region ◆ 國家 ◆／地區 ◆

Postal code ◆ 郵政編號 ◆

◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

C. SCHEME DETAILS & ADMINISTRATION ARRANGEMENT 計劃詳情及行政安排

(1) Scheme Commencement Date 計劃生效日期: 01/08/2025 DD / MM / YYYY 日／月／年

(2) Payroll Group Details 工資組別資料

If your company has more than one payroll group, please provide information on photocopies from Part C(2) to C(10) and attach for submission. 如你公司有多於一個工資組別，請影印 C(2) 至 C(10) 部分以提供資料並一併遞交。

(i) Payroll Group Type 工資組別類別 (Please choose ONE of the options below only. If no choice is made, it will ... 如沒有作出選擇，工資組別類別將預設為「一般僱員」。)

☑ a. Regular Employee 一般僱員 ☐ b. Casual Employee 臨時僱員

由公司自訂名稱以供識別，
如有不同工資組別 / 供款期 / 付款方法便需額外設立多於一個工資組別。

(ii) Payroll Group Name 工資組別名稱 (Please provide Payroll Group Name, e.g. ABC Limited Company - N.T. branch / ABC ... Centre / Monthly Payroll Group. If no information is provided, it will be defaulted to "01". 請提供工資組別名稱，例如：ABC 有限公司 - 新界分店／ABC 醫療中心／每月 ... 別。如沒有提供資料，工資組別名稱將預設為「01」。)

例子1: 如沒有填寫 / 只有1個工資組別，將預設為「01」

例子2: 如有多個工資組別：ABC組別1 / ABC組別2 / ABC組別3

(iii) Payroll Group ID 工資組別編號 (Please provide Payroll Group ID, e.g. Tuen Mun 1 / TM01 / PG1. If no information is provided, it will be defaulted to "01". 請提供工資組別編號，例如：Tuen Mun 1 / TM01 / PG1。如沒有提供資料，工資組別編號將預設為「01」。)

abc1

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

(3) Payroll Group Primary Contact Person for Daily Administration 工資組別日常行政的主要聯絡人

The information provided will be used by the eMPF Platform to contact the Payroll Group Primary Contact Person on daily administration issues related to this Payroll Group. Correspondence (including but not limited to e-notification (if any)) in relation to this Payroll Group will be addressed to the Payroll Group Primary Contact Person listed below. 積金易平台會以下列所提供資料，就工資組別日常行政事宜聯絡工資組別主要聯絡人。有關工資組別的信件 (包括但不限於電子通訊 (如有)) 將會寄出予工資組別主要聯絡人。

Please choose ONE of the options below only. 請只揀選下列其中一項。 (If no choice is made, it will be defaulted to "Same as Company Primary Contact Person". 如沒有作出選擇，工資組別日常行政的主要聯絡人將預設為「與公司主要聯絡人相同」。)

可委任其他同事作為該工資組別聯絡人，
公司可自行決定

- [x] (i) Same as Scheme Authorized Person 1 與計劃獲授權人 1 相同
- [ ] (ii) Same as Scheme Authorized Person 2 與計劃獲授權人 2 相同
- [ ] (iii) Same as Company Primary Contact Person 與公司主要聯絡人相同
- [ ] (iv) Same as Company Secondary Contact Person 與公司第二聯絡人相同
- [ ] (v) Payroll Group Primary Contact Person Details are as follows 工資組別主要聯絡人資料如下：

a. **Title 稱謂** ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

b. **Name 姓名**

Surname in English 英文姓氏

Given Name in English 英文名字

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

c. **Job Title 職銜** _____

d. **Mobile Phone No. 手提電話號碼**
(To provide up-to-date MPF account information to your company, this field is mandatory. 為提供最新強積金帳戶資料予你公司，此欄位必須填寫。)
(Country / Area Code * 國家／地區編號 *)

e. **Secondary Telephone No. 第二聯絡電話號碼**
(Country / Area Code * 國家／地區編號 *)

* SMS (if applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊 (如適用) 只發送至香港手提電話號碼。如未有提供國家／地區編號，將預設為「香港 (852)」。

f. **Email Address 電郵地址** (Email from the eMPF Platform may include important information for MPF account of the company. Please ensure access security for the email address provided. 積金易平台發出的電郵可能載有你公司強積金帳戶的重要資料，請確保提供的電郵地址被安全使用。)

(4) Payroll Group Correspondence Address 工資組別通訊地址

(If different from the above Company Correspondence Address, please provide either English OR Chinese address 如與上述公司通訊地址不同，請提供英文或中文地址)

Flat / Room 單位／室

Floor 樓數

Block 座

Building / Estate 大廈／屋苑

Street (Street No. and Street Name) 街道 (街號及街道名稱)

District Area 區域

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *

Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

選擇該組別的合適選

(5) Contribution Details 供款詳情

(i) Contribution Frequency 供款週期

(If no information is provided below, it will be defaulted to the first day of the "Monthly" basis. 如沒有提供下列資料，供款週期將預設為「每月」的第一天。)

☑ a. Monthly 每月 : 1st Contribution day 首次供款開始日 (Calendar Date of each month 每月的曆日) (e.g. from 1st day to month end 例如：1號至該月的最後 1天) 01 DD 日

☐ b. Semi-monthly 每半月 : 1st Contribution day 首次供款開始日 (Calendar Date of each month 每月的曆日) (e.g. 1st to 15th 例如：1號至 15號) DD 日

2nd Contribution day 第二個供款開始日 (Calendar Date of each month 每月的曆日) (e.g. 16th to month end 例如：16 號至該月的最後 1天) DD 日

☐ c. Fortnightly 每兩周 : 1st Contribution period 首次供款期

From 由 DD / MM / YYYY 日／月／年 To 至 DD / MM / YYYY 日／月／年

(e.g. 2nd Jun to 15th Jun 例如：6月 2號至 6月 15號)

☐ d. Weekly 每周 :

☐ 1. From Monday to Sunday 由星期一至星期日
☐ 2. From Tuesday to Monday 由星期二至星期一
☐ 3. From Wednesday to Tuesday 由星期三至星期二
☐ 4. From Thursday to Wednesday 由星期四至星期三
☐ 5. From Friday to Thursday 由星期五至星期四
☐ 6. From Saturday to Friday 由星期六至星期五
☐ 7. From Sunday to Saturday 由星期日至星期六

☐ e. Others, please specify 其他，請註明 :

(ii) Contribution Bill Generation Day 供款帳單編印日

(If no information is provided, contribution bill generation day will be defaulted to 15th of the month. 如沒有提供資料，供款帳單編印日將預設為每月的 15 日。) 15 DD 日

(6) Payment Method 付款方法

Please choose ONE of the options below only. Method of payment will be defaulted as by "Cheque" without prior notice if no option is chosen. 請只揀選下列其中一項。如沒有就付款方法作出選擇，付款方法將預設為「支票」及不作另行通知。

☑ (i) Direct Debit [2] 直接扣賬 [2]
☐ (ii) Cheque 支票
☐ (iii) Electronic Means 電子途徑 (i.e. Bill Payment / Direct Credit / PPS 即繳付帳單／直接入賬／繳費靈)

選擇合適選項

如選擇「直接扣帳」，需填寫「直接付款授權」表格連同本表格一併交回

Form Centre 表格中心

[2] The setup of direct debit takes approximately 3 to 6 weeks from receipt of your completed "Direct Debit Authorization" ("DDA Form"). The eMPF Platform will send your company a confirmation notifying you the success of direct debit setup. Please settle contribution by other payment means before direct debit setup is completed. Please download "DDA Form" via visiting the website of the eMPF Platform (https://empf.org.hk/forms/en) or scanning the QR code and complete "DDA Form". 設立直接扣賬由收到完整「直接付款授權」(「直接付款授權表格」) 起計，約需時二至六個星期。積金易平台將會發出確認書，通知你公司有關直接扣賬申請成功設立。於直接扣賬安排前，請透過其他付款途徑付款。請透過積金易平台的網頁 (https://empf.org.hk/forms) 或掃描二維碼下載及填寫「直接付款授權表格」。

(7) Remittance Statement ("RS") Arrangements 付款結算書安排 (Please choose one of the options below. If no choice is made, it will be defaulted to generate RS with contribution data [3]. 請揀選下列其中一項。如沒有作出選擇，付款結算書將預設為包括供款資料 [3]。)

選擇合適選項

☐ (i) No need to generate and send hard copy RS 不需要寄及編印付款結算書
☐ (ii) Generate RS with Contribution Data [3] and follow my / our e-Communications option (if applicable) 付款結算書需包括供款資料 [3] 並按照本人／我們的電子通訊選項作出安排 (如適用)
☐ (iii) Generate RS without Contribution Data [3] and follow my / our e-Communications option (if applicable) 付款結算書不需包括供款資料 [3] 並按照本人／我們的電子通訊選項作出安排 (如適用)

[3] Contribution data included Relevant Income, Employer and Employee's Mandatory Contributions and Voluntary Contributions (if any). Contribution data is provided based on the eMPF Platform's recorded data of last payroll period (if any). 供款資料包括有關入息、僱主及僱員的強制性和自願性供款 (如有)，而供款資料將根據積金易平台於上一個支薪期所記錄的資料 (如有) 而定。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

可選擇剔選與否

(8) Contribution Arrangement for Insufficient Payment [4] 款額不足的供款安排 [4]

To avoid delay in contribution processing, the eMPF Platform will allocate the contribution to your employee accounts **on pro-rata basis** if the payment received is not sufficient to settle the required contributions. If you would like to have other arrangement, please tick the following box. 為免延誤處理供款，如所收款額不足以處理供款，積金易平台將**按供款比例**分配至你的僱員帳戶。如你公司擬另作安排，請剔選以下方格。

☐ The Participating Employer hereby gives instructions to hold up the contribution payment and allocation until the payment is sufficient to cover the total required contributions. 參與僱主謹此指示暫緩處理供款款額及分配，直至有足夠款額處理供款總數。

[4] This may result in delay in contribution allocation and you may also be subject to payment of surcharges for the outstanding contributions. 這可能會導致延遲處理你公司的供款，你亦可能須要支付未繳供款的附加費。

(9) Contribution Approval Setting 審批供款設定 (Applicable to online remittance statement in eMPF Employer Portal only. Please choose one of the options below. If no choice is made, it will be defaulted to Not Require Approval from the Scheme Authorized Person. 只適用於積金易僱主平台網上付款結算書。請揀選下列其中一項。如沒有作出選擇，將預設為不需計劃獲授權人的批准。)

選擇合適選項

☐ (i) Not Require Approval from the Scheme Authorized Person 不需計劃獲授權人的批准

☐ (ii) Require Approval from the Scheme Authorized Person 需要計劃獲授權人的批准

(10) Bank Account No. for Payment Deposit (If any) [5] 存入款項 (如有) 銀行戶口號碼 [5] (Optional 可選填)

(If there is any refund, the payment will be deposited to the following designated bank account. 如有任何退款，有關款項將存入下列指定銀行戶口。)

Name of Bank Account Holder 銀行戶口持有人姓名 (A bank account rather than the name of registered employer is not accepted 恕不接受非註冊僱主名稱的銀行戶口)

ABC Company

Name of Bank 銀行名稱 Hong Kong Bank

Bank No. ^ 銀行編號 ^	Branch No. ^ 分行號碼 ^	Account No. (Please specify account suffix no. for integrated account.) 戶口號碼 (如戶口屬於綜合理財戶口，請註明戶口子尾號碼。)
004	001	123456

^ Not applicable for overseas / other places bank 不適用於海外／其他地方銀行

For overseas / other places bank only 只適用於海外／其他地方銀行：

Currency 貨幣

Overseas / Other Places Bank Address 海外／其他地方銀行地址

Country / Region 國家／地區

Overseas / Other Places Bank Swift Code 海外／其他地方銀行 Swift 代碼

Intermediary Bank Name 中介銀行名稱 (If applicable 如適用)

Intermediary Bank Swift Code 中介銀行 Swift 代碼 (If applicable 如適用)

Other Settlement Information (e.g. IBAN) 其他結算資料 (例如國際銀行帳戶號碼) (If applicable 如適用)

Others (e.g. Employer's overseas address / phone no.) 其他 (例如僱主海外地址／電話號碼) (If applicable 如適用)

[5] Bank charges may be incurred in relation to deposit payment to the local bank or overseas / other places bank account. The bank charges will be deducted from the above bank account (if any) associated with bank deposited. In addition, the refund payment amount will be impacted by exchange rate (if applicable). 本地銀行或海外／其他地方銀行戶口存款可能會衍生銀行收費。銀行存款相關的收費 (如有) 將於上述銀行戶口扣除。此外，退回供款金額將受匯率影響 (如適用)。

D. VOLUNTARY CONTRIBUTIONS 自願性供款

If you would like to make Employer Voluntary Contributions, please download "Voluntary Contributions Application / Change Form" via visiting the website of the eMPF Platform (https://empf.org.hk/forms/en) or scanning the QR code and complete "Voluntary Contributions Application / Change Form". 如你公司擬作出僱主自願性供款，請透過積金易平台的網頁 (https://empf.org.hk/forms) 或掃描二維碼下載及填寫「自願性供款申請／更改表格」。

Form Centre 表格中心

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

E. SELF-CERTIFICATION OF TAX RESIDENCY AND TAXPAYER IDENTIFICATION NUMBER OR ITS FUNCTIONAL EQUIVALENT ("TIN") [6]
稅務居民身分自我證明及稅務編號或具有等同功能的識辨編號（「稅務編號」）[6]

- This is a self-certification provided by you to Trustee for the purpose of Automatic Exchange of Financial Account Information ("AEOI") in compliance with tax law and regulations (including but not limited to the Inland Revenue Ordinance (Cap.112) and regulations based on the Organisation for Economic Cooperation and Development ("OECD") Common Reporting Standard ("CRS") for automatic exchange of information). 這是你向受託人提供的自我證明，以作自動交換財務帳戶資料用途以遵守稅務法律及規例（包括但不限於《稅務條例》（第 112 章）及根據自動交換資料有關的經濟合作與發展組織（「OECD」）《共同匯報標準》（「CRS」）的規則）。
- The information provided by you in this part will be updated by the eMPF Platform for all your MPF account(s) maintained in the eMPF Platform for the purpose of AEOI and CRS. 你於本部分提供的資料將會更新你於積金易平台保存的所有強積金帳戶用作自動交換財務帳戶資料及「共同匯報標準」的用途。
- Each jurisdiction has its own rules for defining tax residence, and various jurisdictions provide information on how to determine if you are resident in that particular jurisdiction for tax purposes. In general, you will find that your jurisdiction of tax residence is the jurisdiction / country in which you live. Special circumstances may cause you to be resident elsewhere or resident in more than one jurisdiction / country at the same time (dual residency) for tax purposes. For more information on jurisdiction of tax residence, please consult your tax adviser or the information at the OECD automatic exchange of information portal (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/). 每個稅務管轄區會按照其稅務法律訂定稅務居民的定義，並提供相關資料讓你判定是否屬某一稅務管轄區的稅務居民。一般而言，你的稅務居留司法管轄區／國家會根據你的居住地點而定，因此，如你有多於一處居所（雙重居住地），你可能會同時成為多個稅務管轄區／國家的稅務居民。有關稅務居民身分的更多資訊，請諮詢你的稅務顧問或瀏覽 OECD 的自動交換資料網頁（http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/）。
- If you (or the individual account holder, if you are completing the self-certification on the individual account holder's behalf) are tax resident in a reportable jurisdiction [7] of Hong Kong, you will be classified as a reportable person for AEOI, the Trustee will be legally obliged to pass on the information provided in this self-certification and other financial information with respect to your / the account holder's account(s) to the Hong Kong Inland Revenue Department ("IRD"), and they will transmit this information to the tax authorities of which you are / the account holder is tax resident. 如你（若你以獲授權人身分填寫此自我證明，則該個別人士帳戶持有人）的稅務居民所在地屬香港申報稅務管轄區[7]，你將會被界定為自動交換資料下的申報對象，受託人在法律上有義務將你／該帳戶持有人於此自我證明申報的資料，你／帳戶持有人財務帳戶有關的某些財務資料轉交予香港稅務局，而相關資料或會與你／該帳戶持有人作為稅務居民所屬的稅務機關交換。
- The employer particulars, including but not limited to company name, business registration no., jurisdiction of incorporation or organisation, registered address and correspondence address, etc., provided in this agreement and other related documents will form part of this self-certification. 於本協議及其他相關文件所提供的僱主資料，包括但不限於公司名稱、商業登記號碼、公司或機構註冊所在的司法管轄區、註冊地址及通訊地址等，將會成為此自我證明的一部分。
- This self-certification will remain valid unless there is any change in circumstances relating to information that makes this self-certification incorrect, inaccurate or incomplete. You must notify the eMPF Platform / the Trustee and provide an updated self-certification within 30 days of such change in circumstances. 除非情況有所改變而引致已提交的自我證明上的資料不正確、不準確或不完整，否則該已提交的自我證明仍具十足效力。如情況有所改變，你務必通知積金易平台／受託人，並需要在發生改變後 30 天內向積金易平台／受託人提供一份已更新的自我證明。
- The eMPF Platform **MUST** obtain the complete and valid tax residency self-certification for the setting up of employer account. To avoid any delay in the setting up of employer account and contribution settlement (if any), please read and complete all the appropriate parts below. 積金易平台在開立僱主帳戶前，必須取得完整及有效的稅務居民身分自我證明。為避免僱主帳戶開立及供款處理（如有）有任何延誤，請細閱並完成以下所有適用部分。
- The eMPF Platform / The Trustee has right to require you to provide all relevant identification / verification documentation. Failure in providing the information and other personal data as requested may result in your application / instruction not being able to be processed. 積金易平台／受託人有權要求你提供所有相關的身分證明／驗證文件。如未能提供所需資料及其他個人資料，可能導致你的申請／指示不獲處理。
- Kindly note that the eMPF Platform / the Trustee is not allowed to offer any tax or legal advice to you. For tax-related questions, please consult your tax adviser or visit the OECD website (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) and IRD's AEOI website (www.ird.gov.hk/eng/tax/dta_aeoi.htm), or simply scan the QR code, for more CRS and related information. 請注意積金易平台／受託人不獲允許向你提供稅務或法律意見。任何稅務相關的疑問，請諮詢專業稅務顧問或瀏覽 OECD（http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/）及稅務局（http://www.ird.gov.hk/chi/tax/dta_aeoi.htm）有關自動交換財務帳戶資料的網頁，或掃描此二維碼，以獲取更多 CRS 及相關資料。

OECD-CRS　　IRD稅務局

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

The Entity mentioned in this part refers to a corporation, partnership, a body of persons or a trust (excluding sole proprietors). If you are a sole proprietor, please complete Part E(1) and (2) only (as applicable). 本部分所指之「實體」為法團、合夥、任何其他團體或信託（獨資經營者除外）。如你是獨資經營者，只需填寫（適用的）E(1) 及 (2) 部分。

(1) Entity / Sole Proprietor Tax Residence is 實體／獨資經營者之稅務居住地為 (Please tick one of the appropriate boxes. 請在其中一個適當的方格上填上剔號。)

☑ (i) Hong Kong **ONLY**, with no tax residence in any other jurisdictions / countries (the TIN is as noted in below [8])
只有香港，及沒有處於任何其他司法管轄區／國家的稅務居住地（其稅務編號如以下所註 [8]）
(Please skip Part E(2). 請略過 E(2) 部分。)

如客戶只是香港稅務居民, 不用填E(2)部分

☑ (ii) Hong Kong (the TIN is as noted in below [9]) and also some other jurisdictions / countries
香港（其稅務編號如以下所註 [9]）及其他司法管轄區／國家
(Please fill out Part E(2). 請填寫 E(2) 部分。)

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

如果客戶選擇了(ii)/(iii), 則需要填寫E(2)部分

根據共同匯報標準 **(CRS)** 的要求，如客戶（包括獨資經營者）開設新帳戶時，必須收集並要求填寫「自我證明表格」。
此表格**E(1)**用於聲明您的稅務居民身份（例如，是否為香港稅務居民）
小提示：如帳戶持有人為香港特別行政區的稅務居民，其稅務識別號碼（**TIN**）即為香港商業登記號碼

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

如果未提供稅務編號，則需要填寫理由。

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

Please list (i) ALL jurisdictions / countries (other than Hong Kong) where the accoun… a resident for tax purposes and (ii) the account holder's TIN [6] for each jurisdiction / country. If the space provided is insufficient, please provide it in… ow format on additional sheet(s). 請在以下列明 (i) 帳戶持有人作為稅務居民的所有司法管轄區／國家（香港以外），以及 (ii) 各司法管轄區／國家發出予帳… 有人的稅務編號 [6]。如下列位置不敷應用，請按以下格式另加新頁。

	Jurisdiction / Country of Tax Residency 稅務居民所在司法管轄區／國家	TIN [6] 稅務編號 [6]	If no TIN available, please indicate Reason A, B or C [8] below 若未能提供稅務編號，請於下方填上理由 A、B 或 C [8]	Please explain why you are unable to obtain a TIN if you selected Reason B. 若你選擇理由 B，請在下方解釋無法取得稅務編號的原因。
a.	國家#1	稅務編號#1	A	
b.	國家#2	稅務編號#2	B	原因
c.	國家#3	稅務編號#3	C	

如果理由是B，則需要填寫原因。

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

OECD-TIN

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

[8] If the account holder is a tax resident of Hong Kong, the TIN is: 如賬戶持有人是香港稅務居民，稅務編號是：
- Entity 實體： First 8 digits of the Hong Kong Business Registration No. / TIN 香港商業登記號碼前 8 位數字／稅務編號
- Sole proprietor 獨資經營者：HKID Card No. / TIN 香港身份證號碼／稅務編號

[9] Reason A - The jurisdictions / country where the Entity / Sole Proprietor is a resident for tax purposes does not issue TINs to its residents.
居民的司法管轄區／國家沒有向其居民發出稅務編號。

able to obtain a TIN. (Please explain why you are unable to obtain TIN in the above table if you have selected this reason.)
務編號。（若你選擇這理由，請在上表解釋你無法獲得稅務編號的原因。）

elect this reason if the authority of the relevant jurisdictions / countries of residence do not require the TIN to be disclosed.)
相關司法管轄區或國家的主管當局不需要披露參司法管轄區／國家發出的稅務編號方可選擇這理由。）

此部分只適用於實體，如公司是獨資經營則不用填寫!

財務機構指包括所有銀行、托管機構、存款機構、投資公司或保險公司。例子：銀行、證券買賣公司、投資管理服務機構、指定保險公司、基金管理公司、信託和受托人公司。

(3) …ype [10] 實體類別 [10] (Not applicable to sole-proprietorship 不適用於獨資經營)

客戶需根據其實體類別✓其中一個合適選項，並根據相關選擇填寫資料

…e tick one of the appropriate box

Financial Institution 財務機構 (Please skip Part E(4) 請略過 E(4) 部分)	☐ (i)	Custodial Institution, Depository Institution or Specified Insurance Company 託管機構、存款機構或指明保險公司
	☑ (ii)	…naged by another financial institution (e.g. with discretion to manage the entity's assets) and located in a non-participating jurisdiction 投資實體，但不包括由另一財務機構管… 並位於非參與稅…
Active Non-Financial Entity ("NFE") 主動非財務實體 (Please…	☑ (i)	NFE the stock of which is regularly traded on _____ …market
	☑ (ii)	Related entity of _____, the stock of which is r… traded on _____, which is an established securities market 為 _____ 的有關連實體，該有關連實體的股票經常在 _____（一個其股票在市場）…
	☑ (iii)	…international organisation, a central bank, or an entity wholly owned by one or more of the foregoing entities 政府實體、國際組織、中央銀行或由前述的實體全權擁有的其他實體
	☑ (iv)	Active NFE other than the above, please specify 除上述以外的主動非財務實體，請說明 _____
Passive NFE 被動非財務實體 (Please fill out Part E(4) 請填寫 E(4) 部分)	☐ (i)	Investment entity that is managed by another … 非參與稅務管轄區並由另一財務機構管理的投資實體
	☐ (ii)	…務實體

例子1：此公司為投資管理服務機構

例子2 ：此公司為上市公司

填寫相關交易所, 如: 香港聯合交易所

填寫相關交易市場, 如: 香港

例子3 ：此公司為上市公司附屬公司

填寫相關的上市公司

填寫相關交易所市場, 如: 香港

例子4：此為政府部門

例子5：此公司為餐廳/店舖/工廠/其他

符合相關收入及資產規定的主動非財務實體

例子6：此公司主要收入為業務收租

主動非財務實體至該公司的總收入中，少於50%屬被動收入（被動收入者股息收入、利息收入或租金收入），如果僱主為經營實體與餐廳、店舖、工廠，則他們很可能會歸類為「主動非財務實體」。他亦包括上市公司、上市公司附屬公司、非牟利慈善機構、政府部門、國際組織（例如聯合國或北約）、中央銀行；新成立的非財務實體、正在清盤或出現破產的非財務實體。

被動非財務實體指該公司計劃≥50%的總收入中為被動收入（被動收入指股息收入、利息收入和租金收入）。例子：公司無交易業務，其收入（包括股息、利息或租金）依靠其支撐（股票、存款、出租產業）產生。

…terms.pdf. 不同實體類別之定義請參考 https://www.ird.gov.hk/chi/pdf/2016/terms.pdf。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

如實體是被動非財務實體, 需填寫以下第(4) 部分

(4) Controlling Person [11] 控權人 [11] (Complete this part if the entity account holder is a passive NFE 如實體賬戶持有人是被動非財務實體，填寫此部分)

Form Centre
表格中心

- Please indicate the name of all controlling person(s) of the entity in the table below. If no natural person exercises control over an entity which is a legal person, the controlling person will be the individual holding the position of senior managing official. 請填寫實體之所有控權人的姓名在列表內。就法人實體，如沒有自然人行使控制權，控權人將會是該法人實體的高級管理人員。
- Please download "Tax Residency Self-certification (Controlling Person)" via visiting the website of the eMPF Platform (https://empf.org.hk/forms/en) or scanning the QR code and each controlling person is required to complete a separate "Tax Residency Self-certification (Controlling Person)". 請透過瀏覽積金易平台的網頁 (https://empf.org.hk/forms) 或掃描二維碼下載及每位控權人須另外填寫一份「稅務居民身分自我證明 (控權人)」。

(i)	CHAN SIU MING
(ii)	
(iii)	

重要事項：如實體是「被動非財務實體」，每位控權人需另外填寫一份「稅務居民身份自我證明 (控權人) 」。

重要事項：
- 不同國家可能有不同的稅務規定，賬戶持有人不同國家可能有不同的稅務規定，賬戶持有人或客戶如有疑問，應尋求專業稅務意見。財務策劃顧問不應指導，鼓勵或協助任何賬戶持有人或客戶逃避識別 CRS 報告狀態。財務策劃顧問亦不應提供稅務意見於客戶。
- 賬戶持有人可利用 AIA 的客戶服務渠道，按需要查詢及 或更新其稅務居民身份資料。
- 根據《稅務條例》第 80（2E）條，如任何人在作出自我證明時，在明知一項陳述在要項上屬具誤導性、虛假或不正確，或罔顧一項陳述是否在要項上屬具誤導性、虛假或不正確下，作出該項陳述，即屬犯罪。一經定罪，可處第 3 級（即港幣 $10,000）罰款。

[11] Please refer to the definitions of controlling person at https://www.ird.gov.hk/eng/pdf/2016/terms.pdf. 控權人之定義請參考 https://www.ird.gov.hk/chi/pdf/2016/terms.pdf。

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

F. "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE SCHEME
積金易平台及本計劃收集個人資料聲明 (「聲明」)

Personal Information Collection Statement of The eMPF Platform 積金易平台收集個人資料聲明

eMPF Platform Company Limited may need to collect, process and hold your personal data for the purposes of your enrolment to an MPF scheme and administration of your MPF account. Your personal data may also be used, transferred or disclosed to other parties for purposes as set out in our Personal Information Collection Statement (PICS). If you are already registered with the eMPF Platform, you have already agreed to be bound by our PICS, the latest version of which is set out below. If you are not yet registered, please refer to our PICS set out below. By providing your personal data in this form, you consent to eMPF Platform Company Limited collecting, using and holding your personal data in accordance with our Personal Information Collection Statement. 積金易平台有限公司可能需要收集、處理及持有你的個人資料，用作處理你的強積金計劃登記和你的強積金帳戶管理的用途。你的個人資料亦可能會根據我們的收集個人資料聲明中所列明的用途而被使用、轉移或披露給第三方。若你已註冊積金易平台，即表示你已同意我們的收集個人資料聲明，其最新版本載於下文。若你尚未註冊，請參閱我們以下的收集個人資料聲明。你透過此表格提供個人資料，即表示你同意積金易平台有限公司根據我們的收集個人資料聲明收集、處理及持有你的個人資料。

向客戶講解積金易平台收集個人資料聲明

Personal Information Collection Statement 收集個人資料聲明

This Personal Information Collection Statement (this "**Statement**") is made in accordance with the requirements of the Personal Data (Privacy) Ordinance (Chapter 486 of the Laws of Hong Kong) (the "PDPO") and the guidelines issued by the Office of the Privacy Commissioner for Personal Data. This Statement notifies you of the personal data from time to time collected, processed and held by eMPF Platform Company Limited ("**we**" , "**us**" or "**eMPF Company**"), the purposes for which your personal data will be used and to whom it may be disclosed, and your rights under the PDPO to access and correct your personal data. 本收集個人資料聲明（本「**聲明**」）是根據《個人資料（私隱）條例》（香港法例第 486 章）（「**《私隱條例》**」）的規定及個人資料私隱專員公署發出的指引而制定。本聲明旨在向你闡釋積金易平台有限公司（「**本公司**」、「**我們**」或「**積金易公司**」）不時收集、處理及持有你的個人資料，有關個人資料的用途和可能獲提供有關個人資料的對象，以及你可根據《私隱條例》查閱及更正有關個人資料的權利。

You may learn more about our policies on the collection, use, transfer, retention and protection of your personal data from our Privacy Policy, which is available at www.empf.org.hk/page/privacy-policy . 你可於本公司的《私隱政策》(www.empf.org.hk/page/privacy-policy) 了解更多關於我們收集、使用、移轉、保留及保護你的個人資料的政策。

1. Personal Data collected and maintained by eMPF Company 積金易公司收集及保存的個人資料

The "electronic MPF system" (as defined in the MPFSO) administered and operated by eMPF Company is designated by the Secretary for Financial Services and the Treasury under the Mandatory Provident Fund Schemes Ordinance (Chapter 485 of the Laws of Hong Kong) (the "**MPFSO**") to, inter alia, provide Mandatory Provident Fund ("**MPF**") scheme administration services to facilitate approved trustees of registered schemes in performing their scheme administration functions. eMPF Company provides such MPF scheme administration services through the "electronic MPF system" and other offline facilities including the service centres, administrative centres and call centres (collectively the "**eMPF Platform**"). Personal data which may from time to time be collected, processed and held by eMPF Company in respect of you includes: 根據《強制性公積金計劃條例》（香港法例第 485 章）（「**《強積金條例》**」），財經事務及庫務局局長指定以積金易公司管理和營運的「電子強積金系統」（定義見《強積金條例》）（其中包括）向強制性公積金（「**強積金**」）註冊計劃的核准受託人提供強積金計劃管理服務，以利便核准受託人執行他們的計劃管理職能。積金易公司通過「電子強積金系統」及其他實體設施，包括服務中心、行政中心以及電話支援服務中心（統稱「**積金易平台**」）提供有關強積金計劃管理服務。積金易公司可能不時收集、處理及持有與你有關的個人資料包括：

a. information which you provide during enrolment to an MPF scheme; 你就參與強積金計劃提供的資料；
b. information which you provide during registration for the eMPF Platform (including, if applicable, an image of your Hong Kong Identity Card and your selfies, which are collectively referred to as "identity verification data") and, regardless of any such registration, when you transact with the eMPF Platform; 你就登記使用積金易平台（包括你的香港身份證的影像及自拍照（統稱為「**身分驗證資料**」）（如適用））、以及你使用積金易平台（無論有否進行登記）進行交易時提供的資料；
c. information disclosed by or transferred from approved trustees of your MPF schemes; 由你的強積金計劃的核准受託人披露或移轉的資料；

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d. details of transactions or other dealings in connection with your MPF schemes including, without limitation, information collected to handle your enquiries, complaints, applications, instructions and requests; 你的強積金計劃的交易詳情或其他事務往來，包括但不限於為處理你的查詢、投訴、申請、指示及要求而收集的資料；
e. (processed with your consent if required under the PDPO) information from other third parties and public sources, including but not limited to government authorities; and 來自包括但不限於政府機構的其他第三方或公共來源的資料（如《私隱條例》要求，將在獲得你同意的情況下進行處理）；及
f. information obtained or generated in the course of our performance of scheme administration services and other statutory functions under the MPFSO. 本公司根據《強積金條例》履行提供計劃管理服務及其他法定職能過程中取得或產生的資料。

Please note that personal data and other information requested (except those marked as "optional") must be provided before we can provide you with the relevant service(s) under the eMPF Platform. If you fail to provide such personal data and other information, or if they are inaccurate or incomplete, we may not be able to process your transactions and / or requests, or otherwise provide you with the relevant service. 請注意，本公司只有在取得所有我們要求有關你的個人資料及其他資料（除非標記為「可選填」外）後，方能為你提供積金易平台的相關服務。如你未能提供上述個人資料及其他資料，或該等資料屬不準確或不完整，本公司可能無法處理你的交易及 / 或要求，或為你提供相關服務。

2. Purposes of Collection of Personal Data 收集個人資料的用途

We may collect, process and hold your personal data for the following purposes: 本公司可收集、處理及持有你的個人資料作下列用途：

a. in relation to your identity verification data, to authenticate your identity through eKYC (but not the "iAM Smart" platform and/or the biometric authentication function built in your device) under the eMPF mobile application for accessing the eMPF Platform; 就你的身份驗證資料而言，通過積金易流動應用程式（「**應用程式**」）中的電子身份驗證程序（eKYC）（不涉及「智方便」（iAM Smart）平台及 / 或你裝置內建的生物辨識功能），驗證你的身份以進入積金易平台；
b. to facilitate your access to, and the management of your MPF account; 協助你查閱及管理強積金帳戶；
c. to process, administer and implement your applications, requests or instructions, and to provide you with such services as may from time to time be agreed with the approved trustees of your MPF schemes, all in connection with your MPF schemes; 處理、管理及執行你就強積金計劃所提出的申請、要求或指示，以及根據本公司不時與你的強積金計劃的核准受託人達成的協定，提供有關的服務；
d. for data matching with personal data and other information about you or your employer(s) for scheme administration and other related purposes; 就計劃管理及其他相關用途，與你或你的僱主的個人及其他資料進行比對；
e. for our internal business and administrative purposes, including but not limited to maintaining the security of the eMPF Platform, improvement of user experience, development of the eMPF Platform, administration of our risk management policies and procedures and for the purpose of compiling statistics and undertaking data analysis and other research; 用作本公司內部業務及行政管理的用途，包括但不限於維持積金易平台的安全、改善用戶體驗、發展積金易平台、執行風險管理政策和程序，以及用作數據統計、資料分析及其他研究用途；
f. to communicate with you, and to provide you with customer services; 與你溝通並為你提供客戶服務；
g. for complying with applicable laws and regulations, and any request or direction of, or responding to requests from, regulators, law enforcement agents or other government authorities; 遵從適用的法律和法規，以及監管機構、執法機關或其他政府部門的任何要求或指示，或回應其要求；
h. for protecting or exercising our rights, including but not limited to dealing with your complaints or inquiries, and taking any legal actions; 保障或行使本公司的權利，包括但不限於處理你的投訴或查詢，以及採取任何法律行動；
i. for handling any legal, regulatory or administrative proceedings, investigations or inquiries before any court or competent authority; 處理任何法庭或主管機關的法律、監管或行政管理程序、調查或查詢；
j. for detecting and preventing crime and other unlawful behaviour; 偵查及阻止犯罪及其他違法行為；
k. for any other purposes or functions from time to time specified or designated under the MPFSO; 《強積金條例》不時訂明或指定的任何其他用途或功能；
l. with your consent (including any indication of no objection), for conducting direct marketing in accordance with Section 4 below, whether for itself or on behalf of approved trustees of your MPF schemes; and 經你同意（包括表示不反對），根據下文第 4 條為本公司或代表你的強積金計劃的核准受託人進行直接促銷；及
m. other purposes directly relating to any of the above. 其他與任何上述內容有直接關係的用途。

3. Classes of Transferees 承轉人類別

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

a. your employers and approved trustees of your MPF schemes; 你的僱主及強積金計劃的核准受託人；
b. our agent, adviser, service provider and contractor who provides administrative, telecommunications, computer, payment, fraud prevention, insurance, data processing, information technology, legal, accounting, operational and/or other services or support to us in connection with the operations of the eMPF Platform; 任何就積金易平台的營運而向本公司提供管理、電訊、電腦、付款、反欺詐、保險、資料處理、資訊科技、法律、會計、營運及 / 或其他服務或支援的代理人、顧問、服務供應商或承辦商；
c. the Mandatory Provident Fund Schemes Authority ("**MPFA**"), other government authorities and agencies, courts, regulatory or administrative bodies, law enforcement agencies and other bodies or persons to whom we are under an obligation to make disclosure under any legal, regulatory or administrative requirements applicable to us; and 強制性公積金計劃管理局（「**積金局**」）、其他政府部門及機構、法庭、監管機構或行政管理機構、執法機構及其他機構或人士，如本公司須按照任何適用法律、法規或行政命令向其作出披露；及
d. any other person as agreed with you from time to time. 你不時同意的任何其他人士。

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

4. Direct Marketing 直接促銷

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

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

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僅供內部培訓之用

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

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

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

5. Access and Correction 查閱及更正

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

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

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

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

We may require you to provide identity proof for handling your data access or correction request, and we may charge a fee for complying with your data access request. 處理個人資料查閱或更正的要求時，本公司或會要求你提供身份證明文件，並可就你的資料查閱的要求收取費用。

6. Miscellaneous 其他事宜

We may update this Statement from time to time, and the most recent version can be found at www.empf.org.hk/pics . We will notify you of any update to this Statement and, where required by the PDPO, obtain your consent. 本公司會不時更新本聲明，最新版本可參閱 www.empf.org.hk/pics，我們會通知你有關本聲明的更新，並在《私隱條例》有要求的情況下取得你的同意。

If there is any inconsistency or ambiguity between the English and Chinese versions of this Statement, the English version will prevail. 如本聲明的中英文版本有任何不一致或歧義，概以英文版本為準。

☐ Please tick the box if you do not agree to provide your consent for your personal data to be used for direct marketing purposes in accordance with the "Direct Marketing" section of the Personal Information Collection Statement of eMPF Platform Company Limited. Your indication herein will replace any indication of choice you may have previously provided to eMPF Platform Company Limited in relation to "Direct Marketing". 若你不同意積金易平台有限公司根據其收集個人資料聲明內的「直接促銷」部分，使用你的個人資料以作直接促銷之用途，請在方格內填上剔號。你在此作出之指示，將取代你先前可能已向積金易平台有限公司提供任何有關選擇「直接促銷」的指示。

Personal Information Collection Statement of AIA MPF – Prime Value Choice 友邦強積金優選計劃收集個人資料聲明

AIA Company (Trustee) Limited (the "**Company**", "**we**", "**us**" or "**our**") is a wholly owned subsidiary of AIA Group Limited. AIA Group Limited, together with its subsidiaries and affiliates are collectively referred to in this Statement as the "**AIA Group**" and individually referred to as an "**AIA Entity**".
友邦（信託）有限公司（「**本公司**」、「**我們**」）乃友邦保險控股有限公司的全資附屬公司。在本聲明內，友邦保險控股有限公司連同其附屬公司及聯營公司將統稱為「**友邦集團**」並單獨稱為「**友邦機構**」。

向客戶講解AIA計劃收集個人資料聲明

From time to time, it is necessary for you, as (prospective) participating employers ("**Participating Employers**") and/or members ("**Members**") (collectively referred to as "**you**" or "**your**"), to provide the Company with certain personal data relating to you in connection with the application for and provision of pension schemes as well as the carrying out by the Company of other services relating to the pension schemes. Failure to supply such data may result in the Company being unable to process your application for pension schemes or to provide or continue to provide the pension schemes and/or relevant services to you. During the course of your relationship with the Company, further personal data relating to you, may also be collected in the ordinary course of our business. If you provide personal data to the Company about another individual, you confirm that you are either (i) the parent or legal guardian of the individual, or (ii) you have obtained the individual's consent to provide his or her personal data to the Company, and for such personal data to be used, processed, disclosed and transferred in accordance with this Statement.
在閣下申請及由本公司提供退休金計劃，及當本公司提供與該等退休金計劃及服務相關之其他服務時，作為（準）參與僱主（「**參與僱主**」）及／或成員（「**成員**」）（統稱「**閣下**」），閣下必須不時向我們提供若干關於閣下的個人資料。若閣下未能提供該等資料，可能會令本公司無法處理閣下的退休金計劃申請或向閣下提供或繼續提供退休金計劃及／或相關服務。在閣下與本公司的日常業務過程中，本公司亦可能會在日常業務運作的過程中收集關於閣下的其他個人資料。若閣下向本公司提供關於其他人士的個人資料，閣下確認閣下是 (i) 該名人士的父母或法定監護人，或 (ii) 閣下已獲得該名人士的同意，向本公司提供該人士的個人資料，並同意該等個人資料可根據本聲明被使用、處理、披露及轉移。

(1) PURPOSES FOR COLLECTING PERSONAL DATA
個人資料收集目的

Personal data relating to you held or collected by the Company (including but not limited to credit information and claims history) may be used by the Company for the following purposes ("**Purposes**"):
本公司所持有或收集的有關閣下的個人資料（包括但不限於信用資料及以往申索紀錄）可能會被本公司用作下列用途（「**訂明用途**」）：

(i) processing, accepting and/or rejecting applications for Pension Schemes (as defined below);
處理、接受及／或拒絕該等退休金計劃（如下文定義）的申請；

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僅供內部培訓之用

(ii) the administration and/or management of or in connection with the contributions or benefits or accounts in respect of the Participating Employers and/or Members under the pension schemes (the "**Pension Schemes**") administered by AIA Entities;
由友邦機構執行的退休金計劃（「**該等退休金計劃**」）下參與僱主及／或成員的供款、權益或帳戶的執行及／或管理，或與其供款、權益或帳戶相關的執行及／或管理；

(iii) providing Pension Schemes and related services to you, and processing requests made by you, from time to time in relation to the Pension Schemes and related services, including but not limited to making contributions, transfer of benefits, switching of pension funds and withdrawal of benefits;
為閣下提供該等退休金計劃及相關服務，並處理閣下不時就該等退休金計劃及相關服務提出的要求，包括但不限於作出供款、轉移權益、退休基金轉換及提取權益；

(iv) subject to your consent, conducting direct marketing activities of pension products and related services offered by AIA Entities as described in paragraph (3) below;
如已取得閣下同意，進行下文第 (3) 段所述友邦機構提供的退休金產品及相關服務的直接促銷活動；

(v) performing functions and activities incidental to the provision of Pension Schemes and related services, including, without limitation, reporting, maintenance of online and other services, identity verification, data analysis, research and statistical analysis;
執行與所提供的該等退休金計劃及相關服務相關的功能及活動，包括但不限於報告、維持網上及其他服務、核實身份、資料分析、研究及統計分析；

(vi) improving and furthering the provision of Pension Schemes and related services (including through customer research or surveys) offered by AIA Entities, subject to applicable legislation;
在適用法例規限下，提升及進一步提供由友邦機構提供的該等退休金計劃及相關服務（包括透過客戶研究或調查）；

(vii) complying with the obligations, requirements and/or arrangements for disclosing and using data that bind on or apply to the Company and/or the AIA Group or that the Company and/or the AIA Group is expected to comply with according to:
履行根據下列各項對本公司及／或友邦集團具有約束力或適用或期望本公司及／或友邦集團遵守的就披露及使用資料的義務、要求及／或安排：

(a) any law binding on or applying to it within or outside the Hong Kong Special Administrative Region ("**Hong Kong**") existing currently and in the future (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information);
不論於香港特別行政區（「**香港**」）境內或境外及不論目前或將來存在的對其具法律約束力或適用的任何法律（例如稅務條例及當中的條款，包括與自動交換財務帳戶資料相關的條款）；

(b) any guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of insurance or financial services providers within or outside Hong Kong existing currently and in the future (e.g. guidelines or guidance given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information); or
不論於香港境內或境外及不論目前或將來存在的任何法律、監管、政府、稅務、執法或其他機關，或保險或金融服務供應商的自律監管機構或行業組織或協會所作出或發出的任何指引（例如稅務局作出或發出的指引，包括與自動交換財務帳戶資料相關的指引）；或

(c) any present or future contractual or other commitment with local, national or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of insurance or financial services providers that is assumed by or imposed on the Company or the AIA Group by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations;
本公司或友邦集團因其位於或跟相關本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或保險或金融服務供應商的自律監管機構或行業組織或協會的司法管轄區有關的金融、商業、業務或其他利益或活動，而向該等本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或有關的自律監管機構或行業組織或協會承擔或被施加的任何目前或將來的合約或其他承諾；

(viii) complying with any obligations, requirements, policies, procedures, measures or arrangements for sharing data and information within the AIA Group and/or any other use of data and information in accordance with any group-wide programs for compliance with sanctions or prevention or detection of money laundering, terrorist financing or other unlawful activities;
遵守友邦集團為符合制裁或預防或偵測洗黑錢、恐怖分子融資活動或其他非法活動的任何方案就於友邦集團內共用資料及數據及／或資料及數據的任何其他使用而指定的任何義務、要求、政策、程序、措施或安排；

(ix) enabling an actual or proposed assignee, transferee, participant or sub-participant of the Company's rights or business (or portions thereof) to evaluate or carry out the transaction intended to be the subject of the assignment, transfer, participation or sub-participation; and
允許本公司的權利或業務的實際或建議承讓人、受讓人、參與人或附屬參與人，就擬涉及的轉讓、出讓、參與或附屬參與的交易（或其部分）進行評估或執行有關交易；及

(x) any other purposes relating to the purposes listed above.
與上述用途有關的其他用途。

(2) TRANSFER OF PERSONAL DATA
個人資料的轉移

Personal data held by the Company relating to you will be kept confidential but the Company may provide such data to the following parties, whether inside or outside of Hong Kong, to fulfil the Purposes set out above in paragraph (1) of this Statement:
本公司所持有關於閣下的個人資料將會保密，但本公司可能會向以下各方，不論於香港境內或境外，提供該等資料以符合本聲明以上第 (1) 段所列出的訂明用途：

(i) any agent, contractor or third party service provider who provides services to the Company in connection with the operation of its pension business including administrative, telecommunications, computer, payment, data processing, storage, customer research or survey or other services in connection with the operation of the Pension Schemes;
就退休金業務運作向本公司提供服務的任何代理人、承包人或第三方服務供應者，包括行政、電訊、電腦、付款、資料處理、儲存、客戶研究或調查或其他與該等退休金計劃運作相關的服務；

(ii) relevant Participating Employers (if applicable);
相關參與僱主（如適用）；

友邦機密及專利資料。嚴禁分發。

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(iii) any person or entity to whom the Company or the AIA Group is under an obligation or otherwise required to make disclosure under the requirements of any law or rules, regulations, codes of practice, guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations binding on or applying to the Company or the AIA Group or with which the Company or the AIA Group is expected to comply, or to establish, exercise or defend or to protect legal claims, to protect the rights, property or safety of the Company or the AIA Group, or any disclosure pursuant to any contractual or other commitment of the Company or the AIA Group with local, national or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations, all of which may be within or outside Hong Kong and may be existing currently and in the future;
本公司或友邦集團根據法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織或協會所作出或發出對本公司或友邦集團具有約束力或適用或期望其遵守的法律或規則、規例、實務守則、指引或為建立、行使或抗辯或保護法律索償、保護本公司或友邦集團的權利、財產或安全，或根據本公司或友邦集團向本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織或協會的任何合約或其他承諾（以上不論於香港境內或境外及不論目前或將來存在的），而有義務或以其他方式被要求向其作出披露的任何人士或機構；

(iv) AIA Entities;
友邦機構；

(v) any actual or proposed assignee, transferee, participant or sub-participant of the Company's rights or business; and
本公司的權益或業務的任何實際或建議承讓人、受讓人、參與人或附屬參與人；及

(vi) any persons who/which you have given instructions, authorization and consent to the Company in order to communicate with and provide information to them.
任何閣下已發出指示、授權及同意本公司向其溝通及提供資料的人士。

From time to time, AIA Group or the Company may purchase a business or sell one or more of the Company's business(es) (or portions thereof). In the event that AIA Group or the Company purchase(s) a business, the personal data received with that business would be treated in accordance with this Statement, if it is practicable and permissible to do so. In the event that AIA Group or the Company sell(s) a business, provisions will be included in the selling contract requiring the purchaser to treat your personal data in the same manner required by this Statement.
友邦集團或本公司可能不時收購業務或出售一項或多項本公司業務（或其部分）。如友邦集團或本公司收購業務，若情況可行及允許，該業務下接收的個人資料將會根據本聲明處理。如友邦集團或本公司出售業務，銷售合約中將包含要求買方按本聲明所要求的的方式處理閣下的個人資料之條款。

(3) USE AND PROVISION OF PERSONAL DATA IN DIRECT MARKETING
在直接促銷中使用及提供個人資料

Subject to your consent, the Company may use your personal data we collected for direct marketing of Pension Schemes and related services as described below:
如本公司已取得閣下同意，本公司可以把我們收集的閣下之個人資料用於該等退休金計劃及相關服務的直接促銷如下所述：

(i) your name, your contact details, products and services portfolio information, transaction pattern and behaviour, financial background and demographic data of you collected by the Company from time to time may be used by the Company in direct marketing; and
本公司可以把本公司不時收集的閣下之姓名、閣下之聯絡資料、產品及服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷；及

(ii) the pension products and related services offered by AIA Entities may be marketed.
可以就友邦機構提供的退休金產品及相關服務進行促銷。

If you do not wish the Company to use your personal data we collected for direct marketing of pension products and related services, you may exercise your opt-out right by notifying the Company. To exercise your opt-out right, you may write to the Data Protection Officer of the Company at the address and email address provided in paragraph (4) of this Statement, or provide the Company with your opt-out choice in the relevant application form (if applicable).
如閣下不希望本公司使用本公司收集的閣下之個人資料作退休金產品及相關服務的直接促銷，閣下可通知本公司以行使閣下的拒絕促銷選擇權。如欲行使拒絕促銷選擇權，閣下可根據本聲明第(4)段所提供的地址及電郵以書面向本公司的資料保障主任提出有關要求，或於有關的申請表格內向本公司表達閣下拒絕促銷的意願（如適用）。

(4) DATA ACCESS AND CORRECTION RIGHT
查閱及改正資料權利

In accordance with the Personal Data (Privacy) Ordinance (the "**Ordinance**"), you have the right to request access to and the correction of any of your personal data held by the Company, by writing to the Data Protection Officer of the Company at the following address and email:
根據個人資料（私隱）條例（「**條例**」）規定，閣下有權要求查閱及更正任何本公司持有閣下的個人資料，請以書面經以下地址及電郵向本公司的資料保障主任提出：

The Data Protection Officer
AIA Company (Trustee) Limited
c/o AIA International Limited (as administrator)
12/F, AIA Tower, 183 Electric Road,
North Point,
Hong Kong
Email: AIAHK.Compliance@aia.com

資料保障主任
友邦（信託）有限公司
轉交友邦保險（國際）有限公司（作為管理人）
香港北角電氣道 183 號友邦廣場 12 樓
電郵：AIAHK.Compliance@aia.com

According to the Ordinance, the Company has the right to charge a reasonable fee for the processing of any data access request.
根據條例，本公司有權就處理任何查閱資料要求收取合理費用。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

(5) You also have the right to request for the Company's policies and practices in relation to personal data and to be informed of your personal data that is held by the Company by writing to the Company's Data Protection Officer at the address and email provided in paragraph (4) of this Statement.
閣下亦有權根據本聲明第 (4) 段所提供的地址及電郵向本公司的資料保障主任索取本公司有關個人資料私隱的政策及實務運作資料，並獲告知本公司持有的閣下之個人資料。

(6) Nothing in this Statement shall limit your rights under the Ordinance.
本聲明不會限制閣下在條例下所享有的權利。

(7) The Company retains the right to change this Statement.
本公司保留修改本聲明的權利。

(8) A Privacy Addendum under the Personal Information Protection Law of the People's Republic of China supplements this Statement and is available at https://www.aia.com.hk/en/privacy-statement-main. The Privacy Addendum applies to you if you are within mainland China.
根據中華人民共和國《個人信息保護法》而訂立的私隱附錄就本聲明進行補充，並可在以下網址下載：
https://www.aia.com.hk/zh-hk/privacy-statement-main。若閣下正身處中國大陸，該私隱附錄將適用於閣下。

☐ Please tick the box if you do not agree to provide your consent for (i) eMPF Platform Company Limited to transfer your personal data to the Trustee of the MPF scheme in which you enrol; and (ii) such Trustee to transfer your personal data to the Sponsor of the MPF scheme in which you enrol for direct marketing purposes in accordance with (a) the Personal Information Collection Statement of eMPF Platform Company Limited; and (b) the Personal Information Collection Statement of such Trustee. 若你不同意 (a) 積金易平台有限公司根據其收集個人資料聲明及 (b) 你所登記的強積金計劃受託人根據其收集個人資料聲明部分 (i) 轉移你的個人資料予你所登記的強積金計劃的受託人，及 (ii) 該受託人轉移你的個人資料予你所登記的強積金計劃的保薦人，作直接促銷之用途，請在方格內填上剔號。

G. AUTHORIZATION AND DECLARATION 授權及聲明

By signing this agreement, the Participating Employer ("I / We") 在簽署本協議，參與僱主 (下稱「本人／我們」)：

1. I / We hereby covenant with the Trustee to comply with and be bound by the provisions of the Trust Deed, the Rules (if applicable to the Scheme), this agreement and all applicable laws and regulations of Hong Kong Special Administrative Region of the People's Republic of China. I / We hereby covenants to perform any act or pay any sum required by law to be done or paid by me / us as a Participating Employer for the purposes of the Scheme. By execution of this agreement, I / we as the Participating Employer hereby give to the Trustee such covenants, warranties, undertaking and indemnities as required by the provisions of the Trust Deed. 本人／我們謹與受託人契諾遵守信託契約 (或稱信託契據)、規則 (如適用於本計劃)、本協議及中華人民共和國香港特別行政區所有適用法例與法規內之條款並受其約束。本人／我們作為本計劃的參與僱主謹承諾履行任何有關法律規定或支付任何有關款項。通過簽署本協議，本人／我們作為參與僱主按有關信託契約 (或稱信託契據) 之要求謹此向受託人提供契諾、保證、承諾及賠償。
2. I / We confirm that I / we have received, read and understood the terms / contents of 本人／我們確認已收到、閱讀及明白以下條款／內容：
   (i) the General Terms and Conditions of the eMPF Platform; and 積金易平台一般條款及細則；及
   (ii) the latest MPF Scheme Brochure and the KSID of the Scheme and thoroughly understand the features, benefits and charges of the Scheme; and 本計劃最新的強積金計劃說明書及主要計劃資料文件，並充分瞭解有關本計劃的特點、權益及收費；及
   (iii) the PICS of the eMPF Platform and the Scheme as set out in this agreement relating to the use and disclosure of my / our personal information by the eMPF Platform / the Trustee, I / we confirm that my / our personal information may be used and disclosed for the purposes and to the persons as stated in the PICS; and 本協議所載的積金易平台及本計劃「聲明」有關積金易平台／受託人使用及披露本人／我們的個人資料，本人／我們確認本人／我們的個人資料可按「聲明」所述的目的使用及披露，及向所指明的人士披露；及
   (iv) the Important Notes in this agreement. 本協議的重要事項。
3. I / We acknowledge and agree that the information in Part E will be updated by the eMPF Platform for all my / our MPF account(s) maintained in the eMPF Platform for the purpose of AEOI and CRS. 本人／我們知悉及同意 E 部分的資料將會更新本人／我們於積金易平台保存的所有強積金帳戶用作自動交換財務帳戶資料及「共同匯報標準」的用途。
4. Pursuant to the legal provisions for AEOI provided under the Inland Revenue Ordinance (Cap. 112), I / we acknowledge and agree that: 根據《稅務條例》(第 112 章) 有關自動交換財務帳戶資料的法律條文，本人／我們知悉及同意：
   (i) the information contained in this agreement (which includes any additional sheet(s)) is collected and may be kept by the eMPF Platform / the Trustee for the purpose of AEOI; and 積金易平台／受託人可收集本協議 (包括任何額外紙張) 所載資料並可備存作自動交換財務帳戶資料用途；及
   (ii) such information and information regarding the account holder and any reportable account(s) may be reported by the Trustee to the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region and exchanged with the tax authorities of another jurisdiction or jurisdictions in which the account holder may be resident for tax purposes; and 受託人可把該等資料及關於帳戶持有人及任何須申報帳戶的資料向香港特別行政區政府稅務局申報，從而把資料轉交到帳戶持有人的居留司法管轄區的稅務當局；及
   (iii) I / we agree to the obligation that the account holder must comply with requests made by the eMPF Platform / the Trustee to comply with the CRS (AEOI) requirements under the Inland Revenue Ordinance and / or applicable law and regulation, and such obligation forms the basis of the account to be opened. 本人／我們同意帳戶持有人必須遵守積金易平台／受託人的要求以便遵守《稅務條例》及／或適用法律及規例的 CRS (AEOI) 規定，並為日後開立帳戶之基礎。
5. I / We undertake to advise the eMPF Platform / the Trustee of any change in circumstances which affects the tax residency status of the entity / individual (if Employer is a sole proprietorship) identified in Part E or causes the information provided herein to become incorrect, inaccurate or incomplete, and to provide the eMPF Platform / the Trustee with a suitably updated self-certification within 30 days of such change in circumstances. 本人／我們承諾，如情況有所改變，以致影響於 E 部分所述的實體／個人 (如僱主屬獨資經營者) 的稅務居民身分，或引致提供的資料不正確、不準確或不完整，本人／我們會通知積金易平台／受託人，並會在情況發生改變後 30 天內，向積金易平台／受託人提交一份已適當更新的自我證明。
6. I / We hereby authorize any government office or any organisation or persons who has any records, information of me / us to disclose, release or transfer to the Trustee or its representatives such record or information required for processing this application and for administration of the Scheme upon request by the eMPF Platform / the Trustee or its representatives. 本人／我們特此授權持有本人／我們任何紀錄、資料的任何政府辦事處、團體或個人，在積金易平台／受託人或其代表要求下，可向該受託人或其代表披露、發放或轉移就處理本申請及管理本計劃有關的該等紀錄或資料。
7. I / We declare that the information given and statements made in this agreement (which includes any additional sheet(s)) are, to the best of my / our knowledge and belief, true, correct and complete. I / We further undertake that if there is any change in the information so provided, I / we shall notify the eMPF Platform / the Trustee of such change as soon as reasonably practicable. 本人／我們聲明，盡本人／我們所知所信，本協議 (包括任何額外紙張) 內所載資料及聲明均屬真實、正確及完整。本人／我們進一步承諾，如果所提供的資料有任何改變，本人／我們會在合理而切實可行範圍內儘快通知積金易平台／受託人。

友邦機密及專利資料。嚴禁分發。

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8. I / We understand that if I / we fail to supply complete information as required in this agreement, the eMPF Platform / the Trustee may not be able to establish my / our Participating Employer MPF account and / or Member MPF account. 本人／我們明白，如果本人／我們未能提供本協議內所需的所有資料，積金易平台／受託人可能無法建立本人／我們的參與僱主強積金帳戶及／或成員強積金帳戶。
9. I / We agree to provide the eMPF Platform / the Trustee with any additional documents and information as the eMPF Platform / the Trustee may reasonably require in order to enable the eMPF Platform / the Trustee to comply with the Anti-Money Laundering and Counter-Terrorist Financing Ordinance and the relevant requirements of the MPF legislation. I / We understand the eMPF Platform / the Trustee reserve(s) the right to request for such documents and information as it deems appropriate for the purpose of complying with regulatory requirements and conducting client identification and due diligence before completing the application. The eMPF Platform / the Trustee may refuse to complete the application if such documents or information are not provided to the satisfaction of the eMPF Platform / the Trustee. 本人／我們同意在合理情況下向積金易平台／受託人提供一切所需／額外文件及資料，使積金易平台／受託人能遵守《打擊洗錢及恐怖分子資金籌集條例》及強積金法例下的有關規定。本人／我們明白積金易平台／受託人保留權利在完成申請前索取其認為合適的任何文件及資料，以作遵守監管規定和進行客戶身分辨認及盡職審查之目的。如所提供的該等文件或資料未能令積金易平台／受託人滿意，積金易平台／受託人可拒絕其申請。
10. I / We acknowledge that I / we have identified each connected person stated in this agreement (if applicable) and verified his / her identity on the basis of documents, data or information (including the HKID Card) provided by a governmental body, a relevant authority or any other reliable and independent source that is recognized by the relevant authority. 本人／我們確認已識別本協議所填寫的每位關連人士（如適用）的身分以及根據由政府機構、有關當局或有關當局認可的任何其他可靠及獨立來源所提供的文件、數據或資料（包括香港身份證）核實其身分。
11. I / We certify that the authorized signatories hereunder are duly authorized to execute this agreement for and on behalf of the Participating Employer. 本人／我們確認，本協議的獲授權簽署人獲正式授權代表參與僱主執行本協議。
12. In the absence of wilful default, gross negligence or fraud, I / we agree to indemnify and keep the eMPF Platform / the Trustee indemnified against any and all losses, costs, expenses, actions, proceedings suffered by the eMPF Platform / the Trustee related to my / our participation in the Scheme. 在沒有故意失責、嚴重疏忽或欺詐外的情況下，倘若積金易平台／受託人因執行本人／我們參加計劃的事宜，而導致積金易平台／受託人需要承擔任何及所有損失、成本、費用或招致任何行動或訴訟，本人／我們同意作出有關賠償予積金易平台／受託人。

Authorized Signature(s) ▽ with Company Chop (If applicable)
授權簽署 ▽ 及公司印章（如適用）

Kenny Chan

Date 日期: 01 / 08 / 2025
DD 日 / MM 月 / YYYY 年

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

Capacity ▼ 身分 ▼ : 董事

HKID Card / Passport No. 香港身份證／護照號碼 : Z7654321

Nationality 國籍 : 中國

Residential Address 住址 : 30樓B, 1座,快樂大廈,快樂路11號上環

Email Address 電郵地址 : kennychan00123@gmail.com

▽ This agreement must be signed by the Company Director(s) for Corporation; by the Partner(s) for Partnership; by the Sole Proprietor for Sole Proprietorship; or by the ultimate owner / controller for other types of organisation. The person who provided authorized signatory in this part is deemed to be one of the Scheme Authorized Person(s) of the company, this signature specimen will be used to verify the correspondences in relation to the MPF account of the Scheme. If this agreement is not signed by the respective person as listed above, please provide his / her Authorization Letter or the concerned Board Resolution. 就法團而言，本協議必須由公司董事簽署；合夥經營，須由合夥人簽署；獨資經營，須由獨資經營者簽署；或其他類別的機構，則須由最終擁有人／管理人簽署。於本部分提供授權簽署的人士將被視為公司其中一位計劃獲授權人，此簽署將用於驗證於本計劃強積金帳戶的有關文件。如本協議並非由上述相關人士簽署，請提供其授權書或相關董事局決議。

▼ Please indicate the capacity in which you are signing this agreement, e.g. Company Director(s) for Corporation, Partner(s) for Partnership, Sole Proprietor for Sole Proprietorship, or the ultimate owner / controller for other types of organisation. 請說明你簽署本協議的身分，例如：法團的董事、合夥經營的合夥人、獨資經營的獨資經營者，或其他類別的機構的最終擁有人／管理人。

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

友邦機密及專利資料。嚴禁分發。

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CHECKLIST OF APPLICATION DOCUMENTS 申請文件清單

MPF account setup may be affected if you do not submit all required document(s) and information. The Trustee reserves the right to request additional information and documents for the purpose of complying with regulatory requirements. 如你未能提供全部所需文件及資料，可能會影響開立此強積金帳戶。受託人保留索取更多資料及文件的權利，以作遵守監管規定之目的。

	Required Documents 所需文件	Limited Company 有限公司	Sole Proprietor / Partnership 獨資公司／合夥公司	Other types of organisation 其他類別的機構
1	Copy of Business Registration 商業登記證副本	✓	✓	N/A 不適用
2	Copy of Certificate of Incorporation 公司註冊證書之副本 (Certified true copy is required for Non-listed Overseas Registered Company 非上市海外註冊公司需提供認證副本)	✓	N/A 不適用	N/A 不適用
3	Copy of Certificate to identify the business type issued by official bodies 由官方機構發出用於識別業務類別的證明之副本	N/A 不適用	N/A 不適用	✓
4	Copy of HKID Card / Passport of Scheme Authorized Person(s) 計劃獲授權人的香港身份證／護照之副本	✓	✓	✓
5	Copy of nationality proof of Scheme Authorized Person(s) 計劃獲授權人的國籍證明副本 (Applicable to the nationality reported does not match with the information shown on the copy of identity proof 只適用於如所申報之國籍與提交的身分證明文件上之資料不相符)	✓	✓	✓
6	Copy of HKID Card / Passport of Sole Proprietor 獨資經營者的香港身份證／護照之副本	N/A 不適用	✓	N/A 不適用
7	Copy of HKID Card / Passport of Beneficial Owner(s) 實益擁有人的香港身份證／護照之副本 (Applicable to the corporation is a shell company / the company with bearer shares 只適用於法團為空殼公司／擁有持票人股份的公司)	✓	N/A 不適用	N/A 不適用
8	Copy of latest Annual Return 最新周年申報表之副本	✓	N/A 不適用	N/A 不適用
9	Copy of Memorandum & Articles of Association 公司組織章程大綱及細則之副本 - Applicable only if corporation is unable to provide the Copy of Annual Return 只適用於如法團未能提供周年申報表 - Certified true copy is required for Non-listed Overseas Registered Company 非上市海外註冊公司需提供認證副本	✓	N/A 不適用	N/A 不適用
10	Ownership Chart 擁有權架構表 (Applicable only if company with multiple layers in their ownership structures 只適用於多層擁有權結構的公司)	✓	N/A 不適用	N/A 不適用
11	List of Directors / Partner(s) 董事／合夥人名單	✓	✓	N/A 不適用
12	Beneficial Owner(s)'s proof of source of wealth and the source of funds 實益擁有人的財富來源及資金來源證明文件 (Applicable to the corporation is a shell company / the company with bearer shares 只適用於法團為空殼公司／擁有持票人股份的公司)	✓	N/A 不適用	N/A 不適用
13	Supporting documents from registered agent that an authorised / registered custodian holds the bearer shares, together with the identities of the authorised / registered custodian and the person who has the right to those entitlements carried by the share; or 註冊代理發出有關認可／註冊保管人持有持票人股份的證明文件，以及認可／註冊保管人和有權享有股份所附帶權利的人的身分；或 Declaration from each beneficial owner of such bearer share (i.e. owns or controls, directly or indirectly, including through a trust or bearer share holding, more than 25% of the issued share capital of the corporation) 由實益擁有人發出的聲明 (即直接或間接地擁有或控制該法團已發行股本的 25% 以上的實益擁有人) (Applicable to the shell company / the company that have bearer shares 只適用於法團為空殼公司／擁有持票人股份的公司)	✓	N/A 不適用	N/A 不適用
14	The latest Electronic Extract of information / Certified Extract of information on the Business Register issued by the Business Registration Office 由商業登記署發出最新的商業登記冊內資料的電子摘錄／資料摘錄的核證本	N/A 不適用	✓	N/A 不適用
15	Copy of minutes of meeting or document to proof capacity of signatory 會議記錄或證明簽署人身分的文件之副本	N/A 不適用	N/A 不適用	✓

友邦機密及專利資料。嚴禁分發。

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	Required Documents 所需文件	Limited Company 有限公司	Sole Proprietor / Partnership 獨資公司／合夥公司	Other types of organisation 其他類別的機構
16	Copy of Board Resolutions or Written Authorization 董事會決議或授權書之副本 (Applicable only if this agreement is not signed by the Company Director(s) for Corporation; by the Partner(s) for Partnership; by the Sole Proprietor for Sole Proprietorship; or by the ultimate owner / controller for other types of organisation 只適用於如本協議並非由法團的董事，合夥經營的合夥人，獨資經營的獨資經營者，或其他類別的機構的最終擁有人／管理人簽署)	✓	✓	✓
17	Tax Residency Self-Certification (Controlling Person) 稅務居民身分自我證明 (控權人) (Only applicable if the entity account holder is a passive Non-Financial Entity 只適用於如實體賬戶持有人是被動非財務實體)	✓	✓	✓

Note 註：

Certified true copies should be certified by any of the following personnel: 認證副本必須經由下列人士認證：

(i) a certified public accountant / lawyer / notary public / professional company secretary acceptable to entities of the Trustee of the Scheme; or 任何計劃受託人認可的執業會計師／律師／公證人／專業公司秘書；或

(ii) a person from any designated channels acceptable by the Trustee of the Scheme (i.e. a financial institution, an auditor, a tax advisor, a trust or company service provider). For details, please contact the Trustee via its website / hotline. 任何計劃受託人認可的指定人士 (即金融機構、審計員、稅務顧問、信託或公司服務提供者)，請透過受託人網頁／熱線聯絡受託人查詢詳情。

Submission Channels 遞交途徑

1. Post: PO Box 98929 Tsim Sha Tsui Post Office
   郵寄：尖沙咀郵政局郵政信箱 98929 號
2. Drop-in Box in any one of the eMPF Service Centres below
   下列任何一間積金易服務中心的投遞箱
3. Email address * 電郵地址 * : forms@support.empf.org.hk
4. Fax * 傳真 * : 3197 2988

Please do **NOT** submit duplicate copies to avoid duplication.
請勿遞交相同表格，以免重複。

Enquiries 查詢

1. eMPF Customer Service Hotline 積金易客戶服務熱線 : 183 2622
2. Email address 電郵地址 : enquiry@support.empf.org.hk
3. Fax 傳真 : 3197 2922

eMPF Service Centres Address & Service Hours 積金易服務中心地址及服務時間

Hong Kong Island 香港島	Kowloon 九龍	New Territories 新界
Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong 香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室	Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon 九龍尖沙咀東部麼地道 77 號華懋廣場 12 樓 1205-6 室	Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories 新界荃灣楊屋道 8 號如心廣場第 2 座 18 樓 1802A 室

Service Hours 服務時間：

Monday to Friday	星期一至五	9:00 am – 6:00 pm	上午 9 時至下午 6 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時至下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

eMPF Customer Service Hotline Service Hours 積金易客戶服務熱線服務時間

Monday to Friday	星期一至五	9:00 am – 7:00 pm	上午 9 時至下午 7 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時至下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

* Not applicable for submission of certified true copy (if any). 不適用於遞交認證副本 (如有)。

MPF INTERMEDIARY DETAILS 強積金中介人資料 (For MPF Intermediary Use Only 只供強積金中介人填寫)

Intermediary Name 1 中介人名稱 1: Wong Man Kit	Intermediary Name 2 中介人名稱 2:
MPF Registration No. 強積金註冊編號: 123456	MPF Registration No. 強積金註冊編號:
Agent / Broker Code. 經紀／代理人編號: A0001	Agent / Broker Code. 經紀／代理人編號:

!!!重要提示!!!

如使用此積金易表格，需額外提交友邦強積金客戶聲明及同意書至AIA
此申請表格及簽名核實證明文件（SV）則提交至積金易平台

友邦機密及專利資料。嚴禁分發。

填寫僱主申請表格之常見錯誤

文件類型	常見錯誤
僱主申請表格	• 公司名稱/公司印章與商業登記證副本不符 • 主要營業地點與商業登記證副本不符 • 欠缺/欠清晰/過期商業登記證副本 • 欠缺/欠清晰日常聯繫資料 • 欠缺/欠清晰的參加日期 • 欠缺直接付款授權書(如供款方法選擇直接扣帳) • 欠缺/不正確/未完成的共同匯報標準資料 • 未完成聲明部分 • 僱主申請表和授權簽署人名單不是由董事/擁有人簽署 • 欠缺授權簽署人名單 • 欠缺授權人/登記人的香港永久性居民身份證/護照副本 • 重複現有計劃 • 欠缺中介人資料 **所需文件清單** • 欠缺/不正確的海外公司註冊證書(CI)副本 • 欠缺/不正確的備忘錄和公司章程(M&A)副本 • 欠缺所有董事的姓名 • 欠缺/不正確顯示所有被委任之授權人的董事會決議書

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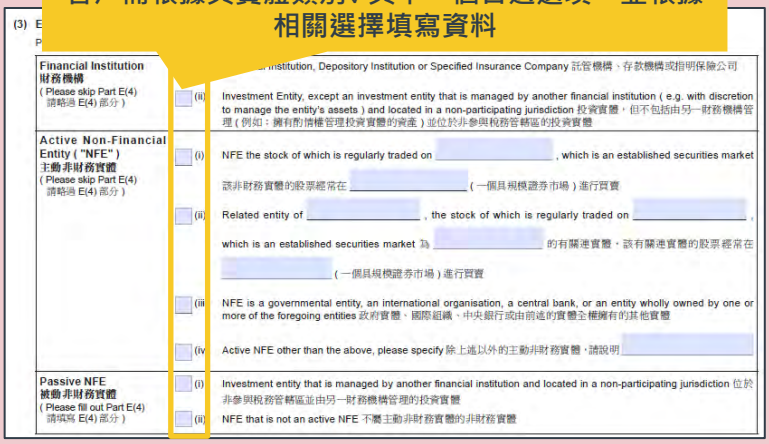
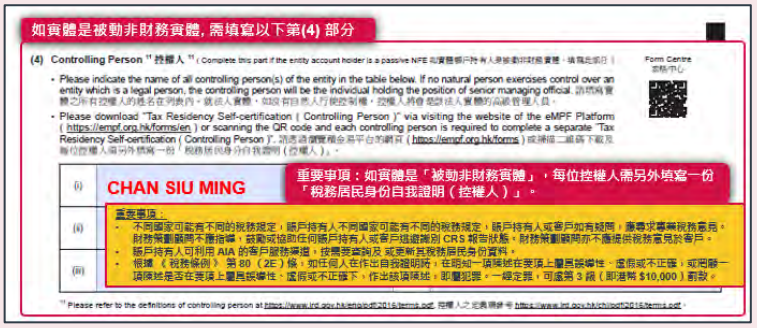
填寫僱主申請表格之常見錯誤與建議

注意事項	參考填寫範例
常見錯誤： • 錯誤選擇實體類別及漏報資料 正確填寫： • 申請人需要根據其實體類別填寫相關資料； • 如有錯誤 / 漏報，將會被列作未能完成申請之論	客戶需根據其實體類別✓其中一個合適選項，並根據相關選擇填寫資料  Financial Institution 財務機構 (Please skip Part E(4) 請略過 E(4) 部分) Active Non-Financial Entity ("NFE") 主動非財務實體 (Please skip Part E(4) 請略過 E(4) 部分) Passive NFE 被動非財務實體 (Please fill out Part E(4) 請填寫 E(4) 部分)
常見錯誤： • 非相關人士 (如授權人) 錯誤填寫此欄 正確填寫： • 第(4)部份是由「被動非財務實體」的控權人填寫；如有錯誤 / 漏報，將會被列作未能完成申請之論	如實體是被動非財務實體, 需填寫以下第(4) 部分  (4) Controlling Person 控權人 CHAN SIU MING 重要事項：如實體是「被動非財務實體」，每位控權人需另外填寫一份「稅務居民身份自我證明（控權人）」。
常見錯誤： • 授權人及其他非相關人士簽署及蓋印 正確填寫： • 就有限公司而言，表格必須由公司董事簽署；合夥經營，須由合夥人簽署；獨資經營，須由獨資經營者簽署；其他類別機構，則須由最終擁有人 / 管理人簽署	 Authorized Signature(s) with Company Chop (If applicable) Kenny Chan Name 姓名 (As shown on HKID Card / Passport): Chan Siu Ming Capacity 身分: 董事 HKID Card / Passport No.: Z7654321 Nationality 國籍: 中國 Residential Address 住址: 30樓B, 1座,快樂大廈,快樂路11號 上環 Email Address 電郵地址: kennychan00123@gmail.com Date 日期: 01 / 08 / 2025 (DD / MM / YYYY)

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友邦強積金優選計劃成員登記表格(REEA) 範例

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僅供內部培訓之用

eMPF 積金易

AIA MPF – PRIME VALUE CHOICE – MEMBER ENROLMENT FORM
友邦強積金優選計劃 – 成員登記表格

REEA

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

eMPF Web Portal 積金易網上平台

Internal use only 內部專用

eMPF Received Date:

REEA

Important Notes 重要事項：

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

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

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

EMPLOYER PARTICULARS 僱主資料 (To be completed by the Employer for below and Part F 須由僱主填寫以下部分及 F 部分)

(1) Employer Name 僱主名稱: ABC Company ("the Employer" 「僱主」)

(2) Employer Account No. 僱主帳戶號碼: 1 2 3 4 5 6 7 8 9 0 1 2 3 4 5

(3) Payroll Group ID 工資組別編號: 0 1

由公司自訂名稱以供識別 (根據該僱員的不同工資組別 / 供款期 / 付款方法作區分) (如有)
如僱主只有一個工資組別及未有自訂名稱，則預設為「０１」

以上部分由僱主填寫

友邦機密及專利資料。嚴禁分發。

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A. MEMBER PARTICULARS 成員資料 (To be completed by the Member for Part A to E 須由成員填寫 A 至 E 部分)

(1) Scheme Details 計劃資料

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

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

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

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

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

Surname in English 英文姓氏: CHAN

Given Name in English 英文名字: TAI MAN ("the Member")

Name in Chinese 中文姓名 (Surname 姓氏): 陳 (Given Name 名字): 大文 (「成員」)

(4) Date of Birth * 出生日期 * 28/08/1988 DD / MM / YYYY 日／月／年

(5) Gender 性別 ☑ Male 男 ☐ Female 女

* If the Member's HKID Card only contains the year of birth and the Member has no other form of identification to prove the exact date of birth (e.g. Birth Certificate or Passport), the eMPF Platform shall adopt 31 December as the Member's birthday. Likewise, if the Member's HKID Card contains only year and month but not the day of birth, the eMPF Platform shall adopt the last day of the month as the birthday. If the Member leaves the month and / or day blank, the eMPF Platform shall follow the above rules to adopt the date of birth as the last day of that month or 31 December. 如成員的香港身份證上只有出生年份，而成員沒有其他證件證明書載出生日期 (例如出生證明書或護照)，積金易平台將以該年之 12 月 31 日作為成員的出生日期。同樣，如成員的香港身份證上只有出生年份及月份而沒有註明出生日子，積金易平台將以有關月份的最後一天作為成員的出生日期。換言之，若成員沒有填寫月份及／或日子，成員的出生日期亦同樣依據以上規定，即定為該月的最後一天或 12 月 31 日。

(6) Identification 身分證明

記得附上香港身份證 / 護照副本

☑ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼: Y1234567

小提示：如客戶同時擁有香港地區以外的稅務居民身份，需填寫B(2)稅務資料

(7) Nationality 國籍 如: 中國香港 / 中國內地 / 美國 / 澳洲

(8) Place of Birth 出生地點 (Not compulsory 可不填寫): 香港

(9) Mobile Phone No. 手提電話號碼
(To provide member up-to-date MPF account information, this field is mandatory. 為提供最新強積金帳戶資料予成員，此欄位必須填寫。)
(Country / Area Code * 國家／地區編號 *): 852 62342345

(10) Secondary Telephone No. 第二聯絡電話號碼
(Country / Area Code * 國家／地區編號 *):

* SMS (if applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊 (如適用) 只發送至香港手提電話號碼。如未有提供國家／地區編號，將預設為「香港 (852)」。

(11) Email Address 電郵地址

chantaiman123@gmail.com

(12) Residential Address 居住地址 (Please provide either English OR Chinese address. P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室: C
Floor 樓數: 30
Block 座: 2
Building / Estate 大廈／屋苑: 開心大廈
Street (Street No. and Street Name) 街道 (街號及街道名稱): 開心路10號
District Area 區域: 上環

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *:
Country * / Region * 國家 * ／地區 *:
Postal code * 郵政編號 *:

* Applicable to address outside Hong Kong only 只適用於香港以外地址

友邦機密及專利資料。嚴禁分發。

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(13) Correspondence Address 通訊地址

(If different from the above Residential Address, please provide either English OR Chinese address 如與上述居住地址不同，請提供英文或中文地址)

Flat / Room 單位／室 | Floor 樓數 | Block 座

Building / Estate 大廈／屋苑

Street (Street No. and Street Name) 街道 (街號及街道名稱)

District Area 區域

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 * | Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

(14) Voluntary Contributions 自願性供款

If you would like to make member voluntary contributions, please contact your employer for arrangement. 如你擬作出成員自願性供款，請聯絡你的僱主以作安排。

B. SELF-CERTIFICATION OF TAX RESIDENCY AND TAXPAYER IDENTIFICATION NUMBER OR ITS FUNCTIONAL EQUIVALENT ("TIN") [2]
稅務居民身分自我證明及稅務編號或具有等同功能的識辨編號 (「稅務編號」) [2]

- This is a self-certification provided by you to the Trustee for the purpose of Automatic Exchange of Financial Account Information ("AEOI") in compliance with tax law and regulations (including but not limited to the Inland Revenue Ordinance (Cap. 112) and regulations based on the Organisation for Economic Cooperation and Development ("OECD") Common Reporting Standard ("CRS") for automatic exchange of information). 這是你向受託人提供的自我證明，以作自動交換財務帳戶資料用途以遵守稅務法律及規例 (包括但不限於《稅務條例》(第 112 章) 及根據自動交換資料有關的經濟合作與發展組織 (「OECD」) (共同匯報標準) (「CRS」) 的規則)。
- The information provided by you in this part will be updated by the eMPF Platform for all your MPF account(s) maintained in the eMPF Platform for the purpose of AEOI and CRS. 你於本部分提供的資料將會更新你於積金易平台保存的所有強積金帳戶用作自動交換財務帳戶資料及「共同匯報標準」的用途。
- Each jurisdiction has its own rules for defining tax residence, and various jurisdictions provide information on how to determine if you are resident in that particular jurisdiction for tax purposes. In general, you will find that your jurisdiction of tax residence is the jurisdiction / country in which you live. Special circumstances may cause you to be resident elsewhere or resident in more than one jurisdiction / country at the same time (dual residency) for tax purposes. For more information on jurisdiction of tax residence, please consult your tax adviser or the information at the OECD automatic exchange of information portal (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/). 每個稅務管轄區會按照其稅務法律訂定稅務居民的定義，並提供相關資料讓你判定是否屬某一稅務管轄區的稅務居民。一般而言，你的稅務居留司法管轄區／國家會根據你的居住地點而定，因此，如你有多於一處居所 (雙重居住地)，你可能會同時成為多個稅務管轄區／國家的稅務居民。有關稅務居民身分的更多資訊，請諮詢你的稅務顧問或瀏覽 OECD 的自動交換資料網頁 (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/)。
- If you are tax resident in a reportable jurisdiction[3] of Hong Kong, you will be classified as a reportable person for AEOI, the Trustee will be legally obliged to pass on the information provided in this self-certification and other financial information with respect to your account(s) to the Hong Kong Inland Revenue Department ("IRD"), and they will transmit this information to the tax authorities of which you are tax resident. 如你的稅務居民所在地屬香港申報稅務管轄區[3]，你將會被界定為自動交換資料下的申報對象，受託人在法律上有義務將你於本自我證明中報的資料，你財務帳戶有關的某些財務資料轉交予香港稅務局，而相關資料或會與你作為稅務居民所屬的稅務機關交換。
- The member particulars, including but not limited to member name, identification document no., date of birth, residential address and correspondence address, provided in Part A forms part of this self-certification. 於 A 部分提供的成員資料，包括但不限於成員姓名、身分證明文件號碼、出生日期、居住地址及通訊地址，會成為本自我證明的一部分。
- This self-certification will remain valid unless there is any change in circumstances relating to information that makes this self-certification incorrect, inaccurate or incomplete. You must notify the eMPF Platform / the Trustee and provide an updated self-certification within 30 days of such change in circumstances. 除非情況有所改變而引致已提交的自我證明上的資料不正確、不準確或不完整，否則該已提交的自我證明仍具十足效力。如情況有所改變，你務必通知積金易平台／受託人，並需要在發生改變後 30 天內向積金易平台／受託人提供一份已更新的自我證明。
- The eMPF Platform **MUST** obtain the complete and valid tax residency self-certification for the setting up of member account. To avoid any delay in the setting up of member account and contribution settlement (if any), please read and complete all the appropriate parts below. 積金易平台在開立成員帳戶前，必須取得完整及有效的稅務居民身分自我證明。為避免成員帳戶開立及供款處理 (如有) 有任何延誤，請細閱並完成以下所有適用部分。
- The eMPF Platform / The Trustee has right to require you to provide all relevant identification / verification documentation. Failure in providing the information and other personal data as requested may result in your application / instruction not being able to be processed. 積金易平台／受託人有權要求你提供所有相關的身分證明／驗證文件。如未能提供所需資料及其他個人資料，可能導致你的申請／指示不獲處理。
- Kindly note that the eMPF Platform / the Trustee is not allowed to offer any tax or legal advice to you. For tax-related questions, please consult your tax adviser or visit the OECD (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) and IRD's AEOI website (http://www.ird.gov.hk/eng/tax/dta_aeoi.htm) or simply scan the QR code, for more CRS and related information. 請注意積金易平台／受託人不獲允許向你提供稅務或法律意見。任何稅務相關的疑問，請諮詢專業稅務顧問或瀏覽 OECD (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) 及稅務局 (http://www.ird.gov.hk/chi/tax/dta_aeoi.htm) 有關自動交換財務帳戶資料的網頁，或掃描此二維碼，以獲取更多 CRS 及相關資料。

OECD-CRS IRD 稅務局

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

友邦機密及專利資料。嚴禁分發。

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

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

如只是香港稅務居民，不用填B(2)部分

- [x] (ii) Hong Kong (and the TIN is my HKID Card No.) and also some other jurisdictions / countries
香港 (及稅務編號為本人之香港身份證號碼) 及其他司法管轄區／國家
(Please fill out the TIN [2] for all other jurisdictions / countries, other than HK, 轄區／國家的稅務編號 [2]。)

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

如果客戶選擇了(ii)/(iii), 則需要填寫B(2)部分

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

Please list (i) ALL jurisdictions / countries (other than Hong Kong) where the ... TIN [2] for each jurisdiction / country. If the space provided is insufficient, please provide it in the ... additional sheet(s). 請在以下列明 (i) 帳戶持有人作為稅務居民的所有司法管轄區／國家 (香港以外)，及 (ii) 各司法管轄區／國家發出予帳戶持有人 ... [2]。如下列位置不敷應用，請按以下格式另加新頁。

如果未提供稅務編號，則需要填寫理由。

	Jurisdiction / Country of Tax Residency 稅務居民所在司法管轄區／國家	TIN [2] 稅務編號 [2]	If no TIN available, please indicate Reason A, B or C [4] below 若未能提供稅務編號，請於下方填上理由 A、B 或 C [4]	Please explain why you are unable to obtain a TIN if you selected Reason B. 若你選擇理由 B，請在下方解釋無法取得稅務編號的原因。
a.	國家#1	稅務編號#1	A	
b.	國家#2	稅務編號#2	B	原因
c.	國家#3	稅務編號#3	C	

如果理由是B，則需要填寫原因。

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

OECD-TIN

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

[4] Reason A 理由 A - The jurisdiction / country where the account holder is a resident for tax purposes does not issue TINs to its residents.
帳戶持有人所屬的稅務居民的司法管轄區／國家沒有向其居民發出稅務編號。

Reason B 理由 B - The account holder is unable to obtain a TIN. (Please explain why the account holder is unable to obtain a TIN in the above table if the account holder has selected this reason.)
帳戶持有人無法獲得稅務編號。(若帳戶持有人選擇這理由，請在上表解釋帳戶持有人無法獲得稅務編號的原因。)

Reason C 理由 C - No TIN is required. (Note: Only select this reason if the authorities of the relevant jurisdictions / countries of residence do not require the TIN to be disclosed.)
無需稅務編號。(註：只有在相關司法管轄／國家的主管當局不需要披露該司法管轄區／國家發出的稅務編號方可選擇這理由。)

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

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

C. INVESTMENT MANDATE 投資授權

Please read the following before completing Part C. 於填寫 C 部分前，請閱讀以下事項。

1. You can choose to invest your contributions (including transfer-in monies) in any constituent funds. However, if you do not wish to make any investment choice, you do not have to do so. In the event of no investment choice or no valid investment mandate is provided, all contributions (including transfer-in monies) will be invested in accordance with the Default Investment Strategy ("DIS"). 你可選擇將你的供款（包括轉入之款項）投資於任何成分基金。但是，如你不想作出任何投資選擇，可無須這樣做。如沒有作出投資選擇或沒有提交有效的投資授權，所有供款（包括轉入之款項）將按照預設投資策略進行投資。
2. DIS is a default investment arrangement as stipulated in accordance with the Mandatory Provident Fund Schemes Ordinance. The DIS is invested in the Core Accumulation Fund and the Age 65 Plus Fund according to the pre-set allocation percentages at different ages and will adjust risk by way of reducing the holding in the Core Accumulation Fund and increasing the holding in the Age 65 Plus Fund after the Member reaches 50 years of age. For more details on de-risking of the DIS, please refer to the MPF Scheme Brochure and the KSID of the Scheme. 預設投資策略是一項根據《強制性公積金計劃條例》規定的預設投資安排。預設投資策略透過於不同年齡按照預定配置百分比來投資於核心累積基金與 65 歲後基金及會隨著成員年滿 50 歲後以減持核心累積基金及增持 65 歲後基金來調整風險。有關預設投資策略降低風險機制的詳情，可參閱本計劃之強積金計劃說明書及主要計劃資料文件。
3. A valid investment mandate for the DIS or each selected fund for either the mandatory contributions or the voluntary contributions must be, including but not limited to: 強制性供款或自願性供款的預設投資策略或每項所選基金的有效投資授權必須為，包括但不限於：
   (i) each investment allocation percentage should be an integer and at least 5%, and 每項投資分配百分比須為整數及至少 5%，及
   (ii) all of the investment allocation percentages add up to 100% in total. 全部投資分配百分比的總和等於 100%。
4. In the below events, contributions made and/or transfer-in monies from another MPF scheme(s) or Occupational Retirement Scheme(s) ("ORDO scheme(s)") for respective contribution type(s) will be: 就下列情況，你作出的供款及／或由其他強積金計劃或職業退休[illegible]入之款項的相關供款類別將會：
   (i) **wholly** invested in the DIS if: 全部根據預設投資策略進行投資，如：
      a. you do not make any investment choice; or 你不作任何投資選擇；或
      b. you do not give a valid, clear or complete investment mandate including but not limited [illegible] 效，清晰，完整的投資授權，包括但不限於更改位置旁沒有加簽作實；或
      c. the investment allocation percentage of any selected funds is not an integer or less tha[illegible]
      d. the total investment allocation percentage of the selected funds is over 100%; or 所選基[illegible]
      e. the instruction of any selected funds is unclear or illegible. 任何所選基金指示不清晰或無[illegible]
   (ii) **partially** (i.e. the remaining percentage) invested in the DIS if the total investment alloca[illegible] 餘的百分比）根據預設投資策略進行投資，如所選基金的投資分配百分比總和少於 100%。
5. You should note that investment markets could fluctuate significantly. Fund unit prices may go down as well as up. Please carefully consider your own risk tolerance level and financial circumstances (as well as your own retirement plan) before making any investment choices. If in doubt, please contact your financial advisor for further details. 你必須注意投資市場可能出現顯著的波動，基金單位價格可跌可升。在作出投資選擇前，你必須小心衡量個人可承受風險的程度及財政狀況（包括你的退休計劃）。如有任何疑問，請諮詢你的財務顧問了解更多詳情。
6. The belo[illegible]列投資授權並[illegible]
7. Contribut[illegible]erred from othe[illegible]款。由另一註[illegible]性供款比例進[illegible]

注意： 提醒客戶分配百分比必須為 5 的倍數 而總和必須為 100 。

注意： 以下4個類別都需要填寫 (如未有自願性供款都需要填寫)，各4個類別的分配百分比總和必須為100 。

DIS / Fund Code 預設投資策略／基金編號	Investment Strategy / Name of Constituent Fund 投資策略／成分基金名稱	Investment Allocation Percentage 投資分配百分比			
		Mandatory Contributions 強制性供款		Voluntary Contributions 自願性供款	
		Employer's Portion 僱主部分	Member's Portion 成員部分	Employer's Portion 僱主部分	Member's Portion 成員部分
Investment Strategy 投資策略					
DS	MPF Default Investment Strategy 強積金預設投資策略 Internal use 內部專用：DIS	%	%	%	%
Equity Funds – Index-Tracking Collective Investment Scheme Series [5] 股票基金 – 緊貼指數集體投資計劃系列 [5]					
3G	American Fund 美洲基金	50 %	50 %	50 %	50 %
3E	Eurasia Fund 亞歐基金	%	%	%	%
3F	Hong Kong and China Fund 中港基金	50 %	50 %	50 %	50 %
83	World Fund 全球基金	%	%	%	%
Fixed Income Funds 固定入息基金					
3D	Asian Bond Fund 亞洲債券基金	%	%	%	%
63	Global Bond Fund 環球債券基金	%	%	%	%
R3	MPF Conservative Fund 強積金保守基金	%	%	%	%

Continued on the next page 續下頁

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D. INVESTMENT MANDATE 投資授權 (Continued 續)

DIS / Fund Code 預設投資策略／基金編號	Investment Strategy / Name of Constituent Fund 投資策略／成分基金名稱	Investment Allocation Percentage 投資分配百分比			
		Mandatory Contributions 強制性供款		Voluntary Contributions 自願性供款	
		Employer's Portion 僱主部分	Member's Portion 成員部分	Employer's Portion 僱主部分	Member's Portion 成員部分
Dynamic Asset Allocation Funds 動態資產配置基金					
3H	China HK Dynamic Asset Allocation Fund 中港動態資產配置基金	%	%	%	%
93	Manager's Choice Fund 基金經理精選退休基金	%	%	%	%
Equity Funds 股票基金					
L3	Asian Equity Fund 亞洲股票基金	%	%	%	%
E3	European Equity Fund 歐洲股票基金	%	%	%	%
D3	Greater China Equity Fund 大中華股票基金	%	%	%	%
N3	North American Equity Fund 北美股票基金	%	%	%	%
53	Green Fund 綠色退休基金	%	%	%	%
Guaranteed Fund 保證基金					
T3	Guaranteed Portfolio 保證組合	%	%	%	%
Lifestyle Funds 人生階段基金					
W3	Growth Portfolio 增長組合	%	%	%	%
B3	Balanced Portfolio 均衡組合	%	%	%	%
V3	Capital Stable Portfolio 穩定資本組合	%	%	%	%
NF	Core Accumulation Fund [$] 核心累積基金 [$]	%	%	%	%
NA	Age 65 Plus Fund [$] 65 歲後基金 [$]	%	%	%	%
	Total 總數	100 %	100 %	100 %	100 %

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

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

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D. "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE SCHEME 積金易平台及本計劃《收集個人資料聲明》(「聲明」)

Personal Information Collection Statement of The eMPF Platform 積金易平台收集個人資料聲明

eMPF Platform Company Limited may need to collect, process and hold your personal data for the purposes of your enrolment to an MPF scheme and administration of your MPF account. Your personal data may also be used, transferred or disclosed to other parties for purposes as set out in our Personal Information Collection Statement (PICS). If you are already registered with the eMPF Platform, you have already agreed to be bound by our PICS, the latest version of which is set out below. If you are not yet registered, please refer to our PICS set out below. By providing your personal data in this form, you consent to eMPF Platform Company Limited collecting, using and holding your personal data in accordance with our Personal Information Collection Statement. 積金易平台有限公司可能需要收集、處理及持有你的個人資料，用作處理你的強積金計劃登記和你的強積金帳戶管理的用途。你的個人資料亦可能會根據我們的收集個人資料聲明中所列明的用途而被使用、轉移或披露給第三方。若你已註冊積金易平台，即表示你已同意我們的收集個人資料聲明，其最新版本載於下文。若你尚未註冊，請參閱我們以下的收集個人資料聲明。你透過此表格提供個人資料，即表示你同意積金易平台有限公司根據我們的收集個人資料聲明收集、處理及持有你的個人資料。

Personal Information Collection Statement 收集個人資料聲明

向客戶講解積金易平台收集個人資料聲明

This Personal Information Collection Statement (this "**Statement**") is made in accordance with the requirements of the Personal Data (Privacy) Ordinance (Chapter 486 of the Laws of Hong Kong) (the "PDPO") and the guidelines issued by the Office of the Privacy Commissioner for Personal Data. This Statement notifies you of the personal data from time to time collected, processed and held by eMPF Platform Company Limited ("**we**", "**us**" or "**eMPF Company**"), the purposes for which your personal data will be used and to whom it may be disclosed, and your rights under the PDPO to access and correct your personal data. 本收集個人資料聲明（本「**聲明**」）是根據《個人資料（私隱）條例》（香港法例第 486 章）（「**《私隱條例》**」）的規定及個人資料私隱專員公署發出的指引而制定。本聲明旨在向你闡釋積金易平台有限公司（「**本公司**」、「**我們**」或「**積金易公司**」）不時收集、處理及持有你的個人資料、有關個人資料的用途和可能獲提供有關個人資料的對象，以及你可根據《私隱條例》查閱及更正有關個人資料的權利。

You may learn more about our policies on the collection, use, transfer, retention and protection of your personal data from our Privacy Policy, which is available at www.empf.org.hk/page/privacy-policy. 你可於本公司的《私隱政策》(www.empf.org.hk/page/privacy-policy) 了解更多關於我們收集、使用、移轉、保留及保護你的個人資料的政策。

1. Personal Data collected and maintained by eMPF Company 積金易公司收集及保存的個人資料

The "electronic MPF system" (as defined in the MPFSO) administered and operated by eMPF Company is designated by the Secretary for Financial Services and the Treasury under the Mandatory Provident Fund Schemes Ordinance (Chapter 485 of the Laws of Hong Kong) (the "**MPFSO**") to, inter alia, provide Mandatory Provident Fund ("**MPF**") scheme administration services to facilitate approved trustees of registered schemes in performing their scheme administration functions. eMPF Company provides such MPF scheme administration services through the "electronic MPF system" and other offline facilities including the service centres, administrative centres and call centres (collectively the "**eMPF Platform**"). Personal data which may from time to time be collected, processed and held by eMPF Company in respect of you includes: 根據《強制性公積金計劃條例》（香港法例第 485 章）（「**《強積金條例》**」），財經事務及庫務局局長指定以積金易公司管理和營運的「電子強積金系統」（定義見《強積金條例》）（其中包括）向強制性公積金（「**強積金**」）註冊計劃的核准受託人提供強積金計劃管理服務，以利便核准受託人執行他們的計劃管理職能。積金易公司通過「電子強積金系統」及其他實體設施，包括服務中心、行政中心以及電話支援服務中心（統稱「**積金易平台**」）提供有關強積金計劃管理服務。積金易公司可能不時收集、處理及持有與你有關的個人資料包括：

a. information which you provide during enrolment to an MPF scheme; 你就參與強積金計劃提供的資料；
b. information which you provide during registration for the eMPF Platform (including, if applicable, an image of your Hong Kong Identity Card and your selfies, which are collectively referred to as "identity verification data") and, regardless of any such registration, when you transact with the eMPF Platform; 你就登記使用積金易平台（包括你的香港身份證的影像及自拍照（統稱為「**身分驗證資料**」）（如適用）），以及你使用積金易平台（無論有否進行登記）進行交易時提供的資料；
c. information disclosed by or transferred from approved trustees of your MPF schemes; 由你的強積金計劃的核准受託人披露或移轉的資料；
d. details of transactions or other dealings in connection with your MPF schemes including, without limitation, information collected to handle your enquiries, complaints, applications, instructions and requests; 你的強積金計劃的交易詳情或其他事務往來，包括但不限於為處理你的查詢、投訴、申請、指示及要求而收集的資料；
e. (processed with your consent if required under the PDPO) information from other third parties and public sources, including but not limited to government authorities; and 來自包括但不限於政府機構的其他第三方或公共來源的資料（如《私隱條例》要求，將在獲得你同意的情況下進行處理）；及
f. information obtained or generated in the course of our performance of scheme administration services and other statutory functions under the MPFSO. 本公司根據《強積金條例》履行提供計劃管理服務及其他法定職能過程中取得或產生的資料。

Please note that personal data and other information requested (except those marked as "optional") must be provided before we can provide you with the relevant service(s) under the eMPF Platform. If you fail to provide such personal data and other information, or if they are inaccurate or incomplete, we may not be able to process your transactions and / or requests, or otherwise provide you with the relevant service. 請注意，本公司只有在取得所有我們要求有關你的個人資料及其他資料（除非標記為「可選填」外）後，方能為你提供積金易平台的相關服務。如你未能提供上述個人資料及其他資料，或該等資料屬不準確或不完整，本公司可能無法處理你的交易及 / 或要求，或為你提供相關服務。

2. Purposes of Collection of Personal Data 收集個人資料的用途

We may collect, process and hold your personal data for the following purposes: 本公司可收集、處理及持有你的個人資料作下列用途：

a. in relation to your identity verification data, to authenticate your identity through eKYC (but not the "iAM Smart" platform and/or the biometric authentication function built in your device) under the eMPF mobile application for accessing the eMPF Platform; 就你的身份驗證資料而言，通過積金易流動應用程式（「**應用程式**」）中的電子身份驗證程序（eKYC）（不涉及「智方便」（iAM Smart）平台及 / 或你裝置內建的生物辨識功能），驗證你的身份以進入積金易平台；
b. to facilitate your access to, and the management of your MPF account; 協助你查閱及管理強積金帳戶；
c. to process, administer and implement your applications, requests or instructions, and to provide you with such services as may from time to time be agreed with the approved trustees of your MPF schemes, all in connection with your MPF schemes; 處理、管理及執行你就強積金計劃所提出的申請、要求或指示，以及根據本公司不時與你的強積金計劃的核准受託人達成的協定，提供有關的服務；
d. for data matching with personal data and other information about you or your employer(s) for scheme administration and other related purposes; 就計劃管理及其他相關用途，與你或你的僱主的個人及其他資料進行比對；

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e. for our internal business and administrative purposes, including but not limited to maintaining the security of the eMPF Platform, improvement of user experience, development of the eMPF Platform, administration of our risk management policies and procedures and for the purpose of compiling statistics and undertaking data analysis and other research; 用作本公司內部業務及行政管理的用途，包括但不限於維持積金易平台的安全、改善用戶體驗、發展積金易平台，執行風險管理政策和程序，以及用作數據統計、資料分析及其他研究用途；
f. to communicate with you, and to provide you with customer services; 與你溝通並為你提供客戶服務；
g. for complying with applicable laws and regulations, and any request or direction of, or responding to requests from, regulators, law enforcement agents or other government authorities; 遵從適用的法律和法規，以及監管機構、執法機關或其他政府部門的任何要求或指示，或回應其要求；
h. for protecting or exercising our rights, including but not limited to dealing with your complaints or inquiries, and taking any legal actions; 保障或行使本公司的權利，包括但不限於處理你的投訴或查詢，以及採取任何法律行動；
i. for handling any legal, regulatory or administrative proceedings, investigations or inquiries before any court or competent authority; 處理任何法庭或主管機關的法律、監管或行政管理程序、調查或查詢；
j. for detecting and preventing crime and other unlawful behaviour; 偵查及阻止犯罪及其他違法行為；
k. for any other purposes or functions from time to time specified or designated under the MPFSO; 《強積金條例》不時訂明或指定的任何其他用途或功能；
l. with your consent (including any indication of no objection), for conducting direct marketing in accordance with Section 4 below, whether for itself or on behalf of approved trustees of your MPF schemes; and 經你同意（包括表示不反對），根據下文第 4 條為本公司或代表你的強積金計劃的核准受託人進行直接促銷；及
m. other purposes directly relating to any of the above. 其他與任何上述內容有直接關係的用途。

3. Classes of Transferees 承轉人類別

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

a. your employers and approved trustees of your MPF schemes; 你的僱主及強積金計劃的核准受託人；
b. our agent, adviser, service provider and contractor who provides administrative, telecommunications, computer, payment, fraud prevention, insurance, data processing, information technology, legal, accounting, operational and/or other services or support to us in connection with the operations of the eMPF Platform; 任何就積金易平台的營運而向本公司提供管理、電訊、電腦、付款、反欺詐、保險、資料處理、資訊科技、法律、會計、營運及／或其他服務或支援的代理人、顧問、服務供應商或承辦商；
c. the Mandatory Provident Fund Schemes Authority (**"MPFA"**), other government authorities and agencies, courts, regulatory or administrative bodies, law enforcement agencies and other bodies or persons to whom we are under an obligation to make disclosure under any legal, regulatory or administrative requirements applicable to us; and 強制性公積金計劃管理局（**「積金局」**），其他政府部門及機構、法庭、監管機構或行政管理機構、執法機構及其他機構或人士，如本公司須按照任何適用法律、法規或行政命令向其作出披露；及
d. any other person as agreed with you from time to time. 你不時同意的任何其他人士。

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

4. Direct Marketing 直接促銷

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

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

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

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

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

5. Access and Correction 查閱及更正

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

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

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

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

We may require you to provide identity proof for handling your data access or correction request, and we may charge a fee for complying with your data access request. 處理個人資料查閱或更正的要求時，本公司或會要求你提供身份證明文件，並可就你的資料查閱的要求收取費用。

友邦機密及專利資料。嚴禁分發。

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6. Miscellaneous 其他事宜

We may update this Statement from time to time, and the most recent version can be found at www.empf.org.hk/pics . We will notify you of any update to this Statement and, where required by the PDPO, obtain your consent. 本公司會不時更新本聲明，最新版本可參閱 www.empf.org.hk/pics，我們會通知你有關本聲明的更新，並在《私隱條例》有要求的情況下取得你的同意。

If there is any inconsistency or ambiguity between the English and Chinese versions of this Statement, the English version will prevail. 如本聲明的中英文版本有任何不一致或歧義，概以英文版本為準。

☐ Please tick the box if you do not agree to provide your consent for your personal data to be used for direct marketing purposes in accordance with the "Direct Marketing" section of the Personal Information Collection Statement of eMPF Platform Company Limited. Your indication herein will replace any indication of choice you may have previously provided to eMPF Platform Company Limited in relation to "Direct Marketing". 若你不同意積金易平台有限公司根據其收集個人資料聲明內的「直接促銷」部分，使用你的個人資料以作直接促銷之用途，請在本格內填上剔號。你在此作出之指示，將取代你先前可能已向積金易平台有限公司提供任何有關選擇「直接促銷」的指示。

向客戶講解AIA計劃收集個人資料聲明

Personal Information Collection Statement of AIA MPF – Prime Value Choice 友邦強積金優選計劃收集個人資料聲明

AIA Company (Trustee) Limited (the "**Company**", "**we**", "**us**" or "**our**") is a wholly owned subsidiary of AIA Group Limited. AIA Group Limited, together with its subsidiaries and affiliates are collectively referred to in this Statement as the "**AIA Group**" and individually referred to as an "**AIA Entity**".
友邦(信託)有限公司(「**本公司**」、「**我們**」)乃友邦保險控股有限公司的全資附屬公司。在本聲明內,友邦保險控股有限公司連同其附屬公司及聯營公司將統稱為「**友邦集團**」並單獨稱為「**友邦機構**」。

From time to time, it is necessary for you, as (prospective) participating employers ("**Participating Employers**") and/or members ("**Members**") (collectively referred to as "**you**" or "**your**"), to provide the Company with certain personal data relating to you in connection with the application for and provision of pension schemes as well as the carrying out by the Company of other services relating to the pension schemes. Failure to supply such data may result in the Company being unable to process your application for pension schemes or to provide or continue to provide the pension schemes and/or relevant services to you. During the course of your relationship with the Company, further personal data relating to you, may also be collected in the ordinary course of our business. If you provide personal data to the Company about another individual, you confirm that you are either (i) the parent or legal guardian of the individual, or (ii) you have obtained the individual's consent to provide his or her personal data to the Company, and for such personal data to be used, processed, disclosed and transferred in accordance with this Statement.
在閣下申請及由本公司提供退休金計劃,及當本公司提供與該等退休金計劃及服務相關之其他服務時,作為(準)參與僱主(「**參與僱主**」)及/或成員(「**成員**」)(統稱「**閣下**」),閣下必須不時向我們提供若干關於閣下的個人資料。若閣下未能提供該等資料,可能會令本公司無法處理閣下的退休金計劃申請或向閣下提供或繼續提供退休金計劃及/或相關服務。在閣下與本公司的日常業務過程中,本公司亦可能會在日常業務運作的過程中收集關於閣下的其他個人資料。若閣下向本公司提供關於其他人士的個人資料,閣下確認閣下是(i)該名人士的父母或法定監護人,或(ii)閣下已獲得該名人士的同意,向本公司提供該人士的個人資料,並同意該等個人資料可根據本聲明被使用、處理、披露及轉移。

(1) PURPOSES FOR COLLECTING PERSONAL DATA
個人資料收集目的

Personal data relating to you held or collected by the Company (including but not limited to credit information and claims history) may be used by the Company for the following purposes ("**Purposes**"):
本公司所持有或收集的有關閣下的個人資料(包括但不限於信用資料及以往申索紀錄)可能會被本公司用作下列用途(「**訂明用途**」):

(i) processing, accepting and/or rejecting applications for Pension Schemes (as defined below);
處理、接受及/或拒絕該等退休金計劃(如下文定義)的申請;

(ii) the administration and/or management of or in connection with the contributions or benefits or accounts in respect of the Participating Employers and/or Members under the pension schemes (the "**Pension Schemes**") administered by AIA Entities;
由友邦機構執行的退休金計劃(「**該等退休金計劃**」)下參與僱主及/或成員的供款、權益或帳戶的執行及/或管理,或與其供款、權益或帳戶相關的執行及/或管理;

(iii) providing Pension Schemes and related services to you, and processing requests made by you, from time to time in relation to the Pension Schemes and related services, including but not limited to making contributions, transfer of benefits, switching of pension funds and withdrawal of benefits;
為閣下提供該等退休金計劃及相關服務,並處理閣下不時就該等退休金計劃及相關服務提出的要求,包括但不限於作出供款、轉移權益,退休基金轉換及提取權益;

(iv) subject to your consent, conducting direct marketing activities of pension products and related services offered by AIA Entities as described in paragraph (3) below;
如已取得閣下同意,進行下文第(3)段所述友邦機構提供的退休金產品及相關服務的直接促銷活動;

(v) performing functions and activities incidental to the provision of Pension Schemes and related services, including, without limitation, reporting, maintenance of online and other services, identity verification, data analysis, research and statistical analysis;
執行與所提供的該等退休金計劃及相關服務相關的功能及活動,包括但不限於報告、維持網上及其他服務、核實身份、資料分析、研究及統計分析;

(vi) improving and furthering the provision of Pension Schemes and related services (including through customer research or surveys) offered by AIA Entities, subject to applicable legislation;
在適用法例規限下,提升及進一步提供由友邦機構提供的該等退休金計劃及相關服務(包括透過客戶研究或調查);

(vii) complying with the obligations, requirements and/or arrangements for disclosing and using data that bind on or apply to the Company and/or the AIA Group or that the Company and/or the AIA Group is expected to comply with according to:
履行根據下列各項對本公司及/或友邦集團具有約束力或適用或期望本公司及/或友邦集團遵守的就披露及使用資料的義務、要求及/或安排:

(a) any law binding on or applying to it within or outside the Hong Kong Special Administrative Region ("**Hong Kong**") existing currently and in the future (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information);
不論於香港特別行政區(「**香港**」)境內或境外及不論目前或將來存在的對其具法律約束力或適用的任何法律(例如稅務條例及當中的條款,包括與自動交換財務帳戶資料相關的條款);

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(b) any guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of insurance or financial services providers within or outside Hong Kong existing currently and in the future (e.g. guidelines or guidance given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information); or
不論於香港境內或境外及不論目前或將來存在的任何法律、監管、政府、稅務、執法或其他機關，或保險或金融服務供應商的自律監管機構或行業組織或協會所作出或發出的任何指引（例如稅務局作出或發出的指引，包括與自動交換財務帳戶資料相關的指引）；或

(c) any present or future contractual or other commitment with local, national or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of insurance or financial services providers that is assumed by or imposed on the Company or the AIA Group by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations;
本公司或友邦集團因其位於或跟相關本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或保險或金融服務供應商的自律監管機構或行業組織或協會的司法管轄區有關的金融、商業、業務或其他利益或活動，而向該等本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或有關的自律監管機構或行業組織或協會承擔或施加於彼等施加的任何目前或將來的合約或其他承諾；

(viii) complying with any obligations, requirements, policies, procedures, measures or arrangements for sharing data and information within the AIA Group and/or any other use of data and information in accordance with any group-wide programs for compliance with sanctions or prevention or detection of money laundering, terrorist financing or other unlawful activities;
遵守友邦集團為符合制裁或預防或偵測洗黑錢、恐怖分子融資活動或其他非法活動的任何方案就於友邦集團內共用資料及數據及／或資料及數據的任何其他使用而指定的任何義務、要求、政策、程序、措施或安排；

(ix) enabling an actual or proposed assignee, transferee, participant or sub-participant of the Company's rights or business (or portions thereof) to evaluate or carry out the transaction intended to be the subject of the assignment, transfer, participation or sub-participation; and
允許本公司的權利或業務的實際或建議承讓人、受讓人、參與人或附屬參與人，就擬涉及的轉讓、出讓、參與或附屬參與的交易（或其部分）進行評估或執行有關交易；及

(x) any other purposes relating to the purposes listed above.
與上述用途有關的其他用途。

(2) TRANSFER OF PERSONAL DATA
個人資料的轉移

Personal data held by the Company relating to you will be kept confidential but the Company may provide such data to the following parties, whether inside or outside of Hong Kong, to fulfil the Purposes set out above in paragraph (1) of this Statement:
本公司所持有關於閣下的個人資料將會保密，但本公司可能會向以下各方，不論於香港境內或境外，提供該等資料以符合本聲明以上第 (1) 段所列出的訂明用途：

(i) any agent, contractor or third party service provider who provides services to the Company in connection with the operation of its pension business including administrative, telecommunications, computer, payment, data processing, storage, customer research or survey or other services in connection with the operation of the Pension Schemes;
就退休金業務運作向本公司提供服務的任何代理人、承包人或第三方服務供應者，包括行政、電訊、電腦、付款、資料處理、儲存、客戶研究或調查或其他與該等退休金計劃運作相關的服務；

(ii) relevant Participating Employers (if applicable);
相關參與僱主（如適用）；

(iii) any person or entity to whom the Company or the AIA Group is under an obligation or otherwise required to make disclosure under the requirements of any law or rules, regulations, codes of practice, guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations binding on or applying to the Company or the AIA Group or with which the Company or the AIA Group is expected to comply, or to establish, exercise or defend or to protect legal claims, to protect the rights, property or safety of the Company or the AIA Group, or any disclosure pursuant to any contractual or other commitment of the Company or the AIA Group with local, national or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations, all of which may be within or outside Hong Kong and may be existing currently and in the future;
本公司或友邦集團根據法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織或協會所作出或發出對本公司或友邦集團具有約束力或適用或期望其遵守的法律或規則、規例、實務守則、指引或為建立、行使或捍衛或保護法律索償，保護本公司或友邦集團的權利、財產或安全，或根據本公司或友邦集團向本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織或協會的任何合約或其他承諾（以上不論於香港境內或境外及不論目前或將來存在的），而有義務或以其他方式被要求向其作出披露的任何人士或機構；

(iv) AIA Entities;
友邦機構；

(v) any actual or proposed assignee, transferee, participant or sub-participant of the Company's rights or business;
and
本公司的權益或業務的任何實際或建議承讓人、受讓人、參與人或附屬參與人；及

(vi) any persons who/which you have given instructions, authorization and consent to the Company in order to communicate with and provide information to them.
任何閣下已發出指示、授權及同意本公司向其溝通及提供資料的人士。

From time to time, AIA Group or the Company may purchase a business or sell one or more of the Company's business(es) (or portions thereof). In the event that AIA Group or the Company purchase(s) a business, the personal data received with that business would be treated in accordance with this Statement, if it is practicable and permissible to do so. In the event that AIA Group or the Company sell(s) a business, provisions will be included in the selling contract requiring the purchaser to treat your personal data in the same manner required by this Statement.
友邦集團或本公司可能不時收購業務或出售一項或多項本公司業務（或其部分）。如友邦集團或本公司收購業務，若情況可行及允許，該業務下接收的個人資料將會根據本聲明處理。如友邦集團或本公司出售業務，銷售合約中將包含要求買方按本聲明所要求的的方式處理閣下的個人資料之條款。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

(3) USE AND PROVISION OF PERSONAL DATA IN DIRECT MARKETING
在直接促銷中使用及提供個人資料

Subject to your consent, the Company may use your personal data we collected for direct marketing of Pension Schemes and related services as described below:
如本公司已取得閣下同意，本公司可以把我們收集的閣下之個人資料用於該等退休金計劃及相關服務的直接促銷如下所述：

(i) your name, your contact details, products and services portfolio information, transaction pattern and behaviour, financial background and demographic data of you collected by the Company from time to time may be used by the Company in direct marketing; and
本公司可以把本公司不時收集的閣下之姓名，閣下之聯絡資料，產品及服務組合資料，交易模式及行為，財務背景及人口統計數據用於直接促銷；及

(ii) the pension products and related services offered by AIA Entities may be marketed.
可以就友邦機構提供的退休金產品及相關服務進行促銷。

If you do not wish the Company to use your personal data we collected for direct marketing of pension products and related services, you may exercise your opt-out right by notifying the Company. To exercise your opt-out right, you may write to the Data Protection Officer of the Company at the address and email address provided in paragraph (4) of this Statement, or provide the Company with your opt-out choice in the relevant application form (if applicable).
如閣下不希望本公司使用本公司收集的閣下之個人資料作退休金產品及相關服務的直接促銷，閣下可通知本公司以行使閣下的拒絕促銷選擇權。如欲行使拒絕促銷選擇權，閣下可根據本聲明第 (4) 段所提供的地址及電郵以書面向本公司的資料保障主任提出有關要求，或於有關的申請表格內向本公司表達閣下拒絕促銷的意願（如適用）。

(4) DATA ACCESS AND CORRECTION RIGHT
查閱及改正資料權利

In accordance with the Personal Data (Privacy) Ordinance (the "**Ordinance**"), you have the right to request access to and the correction of any of your personal data held by the Company, by writing to the Data Protection Officer of the Company at the following address and email:
根據個人資料（私隱）條例（「**條例**」）規定，閣下有權要求查閱及更正任何本公司持有閣下的個人資料，請以書面經以下地址及電郵向本公司的資料保障主任提出：

The Data Protection Officer
AIA Company (Trustee) Limited
c/o AIA International Limited (as administrator)
12/F, AIA Tower, 183 Electric Road,
North Point,
Hong Kong
Email: AIAHK.Compliance@aia.com

資料保障主任
友邦（信託）有限公司
轉交友邦保險（國際）有限公司（作為管理人）
香港北角電氣道 183 號友邦廣場 12 樓
電郵：AIAHK.Compliance@aia.com

According to the Ordinance, the Company has the right to charge a reasonable fee for the processing of any data access request.
根據條例，本公司有權就處理任何查閱資料要求收取合理費用。

(5) You also have the right to request for the Company's policies and practices in relation to personal data and to be informed of your personal data that is held by the Company by writing to the Company's Data Protection Officer at the address and email provided in paragraph (4) of this Statement.
閣下亦有權根據本聲明第 (4) 段所提供的地址及電郵向本公司的資料保障主任索取本公司有關個人資料私隱的政策及實務運作資料，並獲告知本公司持有的閣下之個人資料。

(6) Nothing in this Statement shall limit your rights under the Ordinance.
本聲明不會限制閣下在條例下所享有的權利。

(7) The Company retains the right to change this Statement.
本公司保留修改本聲明的權利。

(8) A Privacy Addendum under the Personal Information Protection Law of the People's Republic of China supplements this Statement and is available at https://www.aia.com.hk/en/privacy-statement-main. The Privacy Addendum applies to you if you are within mainland China.
根據中華人民共和國《個人信息保護法》而訂立的私隱附錄就本聲明進行補充，並可在以下網址下載：https://www.aia.com.hk/zh-hk/privacy-statement-main。若閣下正身處中國大陸，該私隱附錄將適用於閣下。

☐ Please tick the box if you do not agree to provide your consent for (i) eMPF Platform Company Limited to transfer your personal data to the Trustee of the MPF scheme in which you enrol; and (ii) such Trustee to transfer your personal data to the Sponsor of the MPF scheme in which you enrol for direct marketing purposes in accordance with (a) the Personal Information Collection Statement of eMPF Platform Company Limited; and (b) the Personal Information Collection Statement of such Trustee. 若你不同意 (a) 積金易平台有限公司根據其收集個人資料聲明及 (b) 你所登記的強積金計劃受託人根據其收集個人資料聲明部分 (i) 轉移你的個人資料予你所登記的強積金計劃的受託人，及 (ii) 該受託人轉移你的個人資料予你所登記的強積金計劃的保薦人，作直接促銷之用途，請在方格內填上剔號。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

E. AUTHORIZATION AND DECLARATION 授權及聲明

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

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

友邦機密及專利資料。嚴禁分發。

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12. I acknowledge my employer will deduct mandatory contributions and / or voluntary contributions (if applicable) from my income and transfer the contributions to the Trustee. 本人獲悉本人的僱主將從本人的入息內扣除強制性供款及／或自願性供款（如適用），並會將供款轉交受託人。

Signature of Member ^ 成員簽署 ^	Date 日期
Peter Chan 此部分由成員簽署	31 / 10 / 2025 DD 日 / MM 月 / YYYY 年

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

✦ Warning 警告：

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

友邦機密及專利資料。嚴禁分發。

以下部分由僱主填寫

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F. EMPLOYMENT DETAILS 受僱資料 (To be completed by the Employer 須由僱主填寫)

(1) Date of Employment 受僱日期: 15 / 03 / 2025 DD / MM / YYYY 日／月／年

選擇該合適選項

(2) Employee Type 僱員類別

☑ (i) Newly Employed 新聘

選項1：此員工是新加入公司

☑ (ii) Scheme Transfer 計劃轉移
(Scheme transfer from another [illegible] under the same employer
由同一僱主從另一個強積金計劃或獲豁積金豁免的職業退休計劃 * 轉移至本計劃)

選項2：適用於同一僱主轉移到AIA計劃

需另外提交
僱主資金轉移申請表及聯繫公司／更改業務擁有權之成員累算權益轉移表格

Date of Joining the Scheme 參加計劃日期: 31 / 10 / 2025 DD / MM / YYYY 日／月／年

☑ (iii) Intra-group Transfer [7] 轉職至聯繫公司

選項3：適用員工轉移/調配到原僱主的聯繫公司

Date of Employment with Existing Employer Group [8] 受僱於現僱主集團日期 [8]: 31 / 10 / 2025 DD / MM / YYYY 日／月／年

需另外提交
成員轉移自獲豁積金豁免的職業退休計劃之通知書

☑ (iv) Exempt Person [9] 獲豁免人士 [9]
(Please refer to MPFA website fo[illegible]

選項4：適用於從強積金豁免的職業退休計劃(ORSO)轉移/調配至AIA計劃

☑ (v) Expatriate Employee 海外僱員

選項5：適用在香港受僱但暫時在香港以外地方工作的僱員

Employment Visa Issue Date 工作簽證簽發日期: 31 / 10 / 2025 DD / MM / YYYY 日／月／年

* For member transferring from MPF Exempted ORSO Scheme, please complete "Notice of Member Transferring from MPF Exempted ORSO Scheme" and submit along with this form to eMPF Platform for processing. Please contact the eMPF Platform for enquiries about the details or seek assistance. 如成員轉移自獲豁積金豁免的職業退休計劃，請填寫「成員轉移自獲豁積金豁免的職業退休計劃之通知書」並連同此表格一併交回積金易平台處理。請聯絡積金易平台以查詢詳情或尋求協助。

(3) Staff Code 職員編號 (If applicable 如適用): A01

(4) Department Code 部門編號 (If applicable 如適用): 12345

(5) Job Title 職銜: 人事部總經理

(6) Member Class 成員組別 (For Voluntary Contributions only 僅適用於自願性供款): 01 (如有)

(7) Date of Joining the Original Scheme [10 & 11] 參加原計劃日期 [10 & 11] (If applicable 如適用): 31 / 10 / 2025 DD / MM / YYYY 日／月／年

(8) Commencement Date for Voluntary Contributions Vesting Entitlement 享有自願性供款歸屬權益生效日期 (If applicable 如適用): / / DD / MM / YYYY 日／月／年

[7] Please complete "Intra-Group Transfer Form For Transfer of Accrued Benefits upon Intra-group Transfer / Change of Business Ownership" and "Employer's Request for Fund Transfer Form". 請另行填寫「聯繫公司／更改業務擁有權之成員累算權益轉移表格」及「僱主資金轉移申請表」。

[8] Years of service for the calculation of the Member's vesting entitlement will be counted from the above date. 成員歸屬權益的服務年資將會從以上日期起開始計算。

[9] Note: A person serving under a crew agreement under the Merchant Shipping (Seafarers) Ordinance, or on board a ship which is not registered in Hong Kong is not regarded as a "Relevant Employee" under the Mandatory Provident Fund Schemes Ordinance. Hence, he / she is not required to join an MPF scheme and make mandatory contributions. For coverage of MPF System and details about "Exempt Persons" who are not required to join an MPF scheme, please refer to the MPFA's website www.mpfa.org.hk. If you have any queries, please contact the eMPF Platform / the Trustee. 注意：根據《商船（海員）條例》所指的船員協議而服務的人士，或在並非於香港註冊的船舶上服務的人士，並不被視為《強制性公積金計劃條例》下的「有關僱員」。因此，他／她毋須參加強積金計劃及作強制性供款。有關強積金制度的涵蓋範圍及毋須參加強積金計劃的「獲豁免人士」詳情，請參閱積金局網頁 www.mpfa.org.hk。如有任何疑問，請聯絡積金易平台／受託人。

[10] Applicable if there are voluntary contribution benefits transferred via scheme transfer or intra-group transfer and the vesting scale of the benefits is counted from the date of joining the original scheme only. 僅適用如計劃轉移或轉職至聯繫公司等涉自願性供款權益轉移，而該權益的歸屬比例是以原計劃參加日期計算。

[11] Original scheme refers to the scheme from which the benefits of the Member is to be transferred. 原計劃指轉出成員權益的計劃。

By signing this form, the Employer ("I / We") 在簽署本表格，僱主 (下稱「本人／我們」):

1. I / We confirm that I / we have identified the employee on this form and verified the employee's identity on the basis of documents, data or information (including the HKID Card) provided by a governmental body, a relevant authority or any other reliable and independent source that is recognized by the relevant authority. I / We also retain a copy of the documents for record purpose. 本人／我們確認已識別本表格的僱員身分，以及根據由政府機構、有關當局或有關當局認可的任何其他可靠及獨立來源所提供的文件、數據或資料 (包括的香港身份證) 核實僱員的身分。此外，本人／我們亦已保存文件副本以作記錄之用。
2. I / We hereby agree to enroll the employee named above to the Scheme and confirm that all the information provided in this form (which includes any additional sheet(s)) is authorized by the employee and is to the best of my / our knowledge true, correct and complete. 本人／我們特此同意登記上述僱員於本計劃內，並且確認，盡本人／我們所知，在本表格 (包括任何額外紙張) 內所載資料都由僱員授權及乃真實、正確及完整。

Authorized Signature(s) with Company Chop (If applicable) 授權簽署及公司印章 (如適用) | Date 日期

Kenny Chan | 04 / 11 / 2025 DD 日 / MM 月 / YYYY 年

此部分由董事/獲授權人士簽署

友邦機密及專利資料。嚴禁分發。

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MISCELLANEOUS 其他

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試用強積金投資風格評估

OR visit aia.com.hk

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Submission Channels 遞交途徑	Enquiries 查詢
1. Post: PO Box 98929 Tsim Sha Tsui Post Office 郵寄：尖沙咀郵政局郵政信箱 98929 號	1. eMPF Customer Service Hotline 積金易客戶服務熱線：183 2622
2. Drop-in Box in any one of the eMPF Service Centres below 下列任何一間積金易服務中心的投遞箱	2. Email address 電郵地址：enquiry@support.empf.org.hk
3. Email address 電郵地址：forms@support.empf.org.hk	3. Fax 傳真：3197 2822
4. Fax 傳真：3197 2988	
Please do **NOT** submit duplicate copies to avoid duplication. 請勿遞交相同表格，以免重複。	

eMPF Service Centres Address & Service Hours 積金易服務中心地址及服務時間

Hong Kong Island 香港島	Kowloon 九龍	New Territories 新界
Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong 香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室	Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon 九龍尖沙咀東部麼地道 77 號華懋廣場 12 樓 1205-6 室	Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories 新界荃灣楊屋道 8 號如心廣場第 2 座 18 樓 1802A 室

Service Hours 服務時間：

Monday to Friday	星期一至五	9:00 am – 6:00 pm	上午 9 時 至 下午 6 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

eMPF Customer Service Hotline Service Hours 積金易客戶服務熱線服務時間

Monday to Friday	星期一至五	9:00 am – 7:00 pm	上午 9 時 至 下午 7 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

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友邦強積金優選計劃
個人帳戶成員申請表(PAA)
範例及常見錯誤與建議

友邦機密及專利資料。嚴禁分發。

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eMPF 積金易 | AIA

Go Green with E-Submission for Efficiency
為更有效率請使用電子表格
eMPF Web Portal 積金易網上平台

Internal use only 內部專用
eMPF Received Date:
PAA

AIA MPF – PRIME VALUE CHOICE – PERSONAL ACCOUNT MEMBER APPLICATION FORM
友邦強積金優選計劃 – 個人帳戶成員申請表

PAA

Important Notes 重要事項：

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

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

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

A. MEMBER PARTICULARS 成員資料

(1) Scheme Details 計劃資料

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

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

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

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

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

Surname in English 英文姓氏: CHAN

Given Name in English 英文名字: TAI MAN ("the Member")

Name in Chinese 中文姓名 (Surname 姓氏): 陳 (Given Name 名字): 大文 (「成員」)

友邦機密及專利資料。嚴禁分發。

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(4) Date of Birth ' 出生日期 ' 28/08/1988 DD/MM/YYYY 日/月/年 (5) Gender 性別 ☑ Male 男 ☐ Female 女

' If the Member's HKID Card only contains the year of birth and the Member has no other form of identification to prove the exact date of birth (e.g. Birth Certificate or Passport), the eMPF Platform shall adopt 31 December as the Member's birthday. Likewise, if the Member's HKID Card contains only year and month but not the day of birth, the eMPF Platform shall adopt the last day of the month as the birthday. If the Member leaves the month and / or day blank, the eMPF Platform shall follow the above rules to adopt the date of birth as the last day of that month or 31 December. 如成員的香港身份證上只有出生年份，而成員沒有其他證件證明實際出生日期 (例如出生證明書或護照)，積金易平台將以該年之 12 月 31 日作為成員的出生日期。同樣，如成員的香港身份證上只有出生年份及月份而沒有註明出生日子，積金易平台將以有關月份的最後一天作為成員的出生日期。請注意，若成員沒有填寫月份及／或日子，成員的出生日期亦同樣依據以上規定，即定為該月的最後一天或 12 月 31 日。

記得附上香港身份證 / 護照副本

(6) Identification 身分證明

☑ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港[illegible]填寫)

小提示：如客戶同時擁有香港地區以外的稅務居民身份，需填寫B(2)稅務資料

Document No. 證件號碼 Y1234567

如: 中國香港 / 中國內地 / 美國 / 澳洲

(7) Nationality 國籍 (8) Place of Birth 出生地點 (Not compulsory 可不填寫) 香港

(9) Mobile Phone No. 手提電話號碼 (To provide member up-to-date MPF account information, this field is mandatory. 為提供最新強積金帳戶資料予成員，此欄位必須填寫。) 852 (Country / Area Code * 國家／地區編號 *) 62342345

* SMS (if applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊 (如適用) 只發送至香港手提電話號碼。如未有提供國家／地區編號，將預設為「香港 (852)」。

(10) Secondary Telephone No. 第二聯絡電話號碼 (Country / Area Code * 國家／地區編號 *)

(11) Email Address 電郵地址 chantaiman123@gmail.com

(12) Job Title / Occupation 職銜／職業 人力資源

(13) Residential Address 居住地址 (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室 C Floor 層數 30 Block 座 2

Building / Estate 大廈／屋苑 開心大廈

Street (Street No. and Street Name) 街道 (街號及街道名稱) 開心路10號

District Area 區域 上環

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 * Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

(14) Correspondence Address 通訊地址

(If different from the above Residential Address, please provide either English OR Chinese address 如與上述居住地址不同，請提供英文或中文地址)

Flat / Room 單位／室 Floor 層數 Block 座

Building / Estate 大廈／屋苑

Street (Street No. and Street Name) 街道 (街號及街道名稱)

District Area 區域

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 * Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

友邦機密及專利資料。嚴禁分發。

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B. SELF-CERTIFICATION OF TAX RESIDENCY AND TAXPAYER IDENTIFICATION NUMBER OR ITS FUNCTIONAL EQUIVALENT ("TIN") [2]
稅務居民身分自我證明及稅務編號或具有等同功能的識辨編號 (「稅務編號」) [2]

- This is a self-certification provided by you to the Trustee for the purpose of Automatic Exchange of Financial Account Information ("AEOI") in compliance with tax law and regulations (including but not limited to the Inland Revenue Ordinance (Cap. 112) and regulations based on the Organisation for Economic Cooperation and Development ("OECD") Common Reporting Standard ("CRS") for automatic exchange of information). 這是你向受託人提供的自我證明，以作自動交換財務帳戶資料用途以遵守稅務法律及規例 (包括但不限於《稅務條例》(第 112 章) 及根據自動交換資料有關的經濟合作與發展組織 (「OECD」)《共同匯報標準》(「CRS」) 的規則)。
- The information provided by you in this part will be updated by the eMPF Platform for all your MPF account(s) maintained in the eMPF Platform for the purpose of AEOI and CRS. 你於本部分提供的資料將會更新你於積金易平台保存的所有強積金帳戶用作自動交換財務帳戶資料及「共同匯報標準」的用途。
- Each jurisdiction has its own rules for defining tax residence, and various jurisdictions provide information on how to determine if you are resident in that particular jurisdiction for tax purposes. In general, you will find that your jurisdiction of tax residence is the jurisdiction / country in which you live. Special circumstances may cause you to be resident elsewhere or resident in more than one jurisdiction / country at the same time (dual residency) for tax purposes. For more information on jurisdiction of tax residence, please consult your tax adviser or the information at the OECD automatic exchange of information portal (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/). 每個稅務管轄區會按照其稅務法律訂定稅務居民的定義，並提供相關資料讓你判定是否屬某一稅務管轄區的稅務居民。一般而言，你的稅務居留司法管轄區／國家會根據你的居住地點而定，因此，如你有多於一處居所 (雙重居住地)，你可能會同時成為多個稅務管轄區／國家的稅務居民。有關稅務居民身分的更多資訊，請諮詢你的稅務顧問或瀏覽 OECD 的自動交換資料網頁 (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/)。
- If you are tax resident in a reportable jurisdiction [3] of Hong Kong, you will be classified as a reportable person for AEOI, the Trustee will be legally obliged to pass on the information provided in this self-certification and other financial information with respect to your account(s) to the Hong Kong Inland Revenue Department ("IRD"), and they will transmit this information to the tax authorities of which you are tax resident. 如你的稅務居民所在地屬香港申報稅務管轄區 [3]，你將會被界定為自動交換資料下的申報對象，受託人在法律上有義務將你於本自我證明申報的資料，你財務帳戶有關的某些財務資料轉交予香港稅務局，而相關資料或會與你作為稅務居民所屬的稅務機關交換。
- The member particulars, including but not limited to member name, identification document no., date of birth, residential address and correspondence address, provided in Part A forms part of this self-certification. 於 A 部分提供的成員資料，包括但不限於成員姓名、身分證明文件號碼、出生日期、居住地址及通訊地址，會成為本自我證明的一部分。
- This self-certification will remain valid unless there is any change in circumstances relating to information that makes this self-certification incorrect, inaccurate or incomplete. You must notify the eMPF Platform / the Trustee and provide an updated self-certification within 30 days of such change in circumstances. 除非情況有所改變而引致已提交的自我證明上的資料不正確、不準確或不完整，否則該已提交的自我證明仍具十足效力。如情況有所改變，你務必通知積金易平台／受託人，並需要在發生改變後 30 天內向積金易平台／受託人提供一份已更新的自我證明。
- The eMPF Platform **MUST** obtain the complete and valid tax residency self-certification for the setting up of member account. To avoid any delay in the setting up of member account and contribution settlement (if any), please read and complete all the appropriate parts below. 積金易平台在開立成員帳戶前，**必須**取得完整及有效的稅務居民身分自我證明。為避免成員帳戶開立及供款處理 (如有) 有任何延誤，請細閱並完成以下所有適用部分。
- The eMPF Platform / The Trustee has right to require you to provide all relevant identification / verification documentation. Failure in providing the information and other personal data as requested may result in your application / instruction not being able to be processed. 積金易平台／受託人有權要求你提供所有相關的身分證明／驗證文件。如未能提供所需資料及其他個人資料，可能導致你的申請／指示不獲處理。
- Kindly note that the eMPF Platform / the Trustee is not allowed to offer any tax or legal advice to you. For tax-related questions, please consult your tax adviser or visit the OECD (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) and IRD's AEOI website (http://www.ird.gov.hk/eng/tax/dta_aeoi.htm), or simply scan the QR code, for more CRS and related information. 請注意積金易平台／受託人不獲允許向你提供稅務或法律意見。任何稅務相關的疑問，請向專業稅務顧問或瀏覽 OECD (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) 及稅務局 (http://www.ird.gov.hk/chi/tax/dta_aeoi.htm) 有關自動交換財務帳戶資料的網頁，或掃描此二維碼，以獲取更多 CRS 及相關資料。

OECD-CRS　　IRD 稅務局

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

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

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

如只是香港稅務居民，不用填B(2)部分

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

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

如果客戶選擇了(ii)/(iii), 則需要填寫B(2)部分

及邦機密及專利資料。嚴禁分發。

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

Please list **(i)** ALL jurisdictions / countries (other than Hong Kong) where the account holder is a resident for tax purposes and **(ii)** the account holder's TIN [2] for each jurisdiction / country. If the space provided is insufficient, please provide it in the below format on additional sheet(s). 請在以下列明 **(i)** 帳戶持有人作為稅務居民的所有司法管轄區／國家（香港以外），及 **(ii)** 各司法管轄區／國家發出予帳戶持有人的稅務編號 [2]。如下列位置不敷應用，請按以下格式另加新頁。

	Jurisdiction / Country of Tax Residency 稅務居民所在司法管轄區／國家	TIN [2] 稅務編號 [2]	If no TIN available, please indicate Reason A, B or C [4] below 若未能提供稅務編號，請於下方填上理由 A、B 或 C [4]	Please explain why you are unable to obtain a TIN if you selected Reason B. 若你選擇理由 B，請在下方解釋無法取得稅務編號的原因。
a.	國家#1	稅務編號#1	A	
b.	國家#2	稅務編號#2	B	原因
c.	國家#3	稅務編號#3	C	

如果理由是B，則需要填寫原因。

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

OECD-TIN

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

[4] Reason A 理由 A – The jurisdiction / country where the account holder is a resident for tax purposes does not issue TINs to its residents. 帳戶持有人所屬的稅務居民的司法管轄區／國家沒有向其居民發出稅務編號。

Reason B 理由 B – The account holder is unable to obtain a TIN. (Please explain why the account holder is unable to obtain a TIN in the above table if the account holder has selected this reason.) 帳戶持有人無法獲得稅務編號。（若帳戶持有人選擇這理由，請在上表解釋帳戶持有人無法獲得稅務編號的原因。）

Reason C 理由 C – No TIN is required. (Note: Only select this reason if the authorities of the relevant jurisdictions / countries of residence do not require the TIN to be disclosed.) 無需稅務編號。（註：只有在相關司法管轄區／國家的主管當局不需要披露該司法管轄區／國家發出的稅務編號方可選擇這理由。）

✦ Warning 警告：

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

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

C. INVESTMENT MANDATE 投資授權

Please read the following before completing Part C. 於填寫 C 部分前，請閱讀以下事項。

1. You can choose to invest your transfer-in monies in any constituent funds. However, if you do not wish to make any investment choice, you do not have to do so. In the event of no investment choice or no valid investment mandate is provided, all transfer-in monies will be invested in accordance with the Default Investment Strategy ("DIS"). 你可選擇將你轉入之款項投資於任何成分基金。但是，如你不想作出任何投資選擇，可無須這樣做。如沒有作出投資選擇或沒有提交有效的投資授權，所有轉入之款項將按照預設投資策略進行投資。
2. DIS is a default investment arrangement as stipulated in accordance with the Mandatory Provident Fund Schemes Ordinance. The DIS is invested in the Core Accumulation Fund and the Age 65 Plus Fund according to the pre-set allocation percentages at different ages and will adjust risk by way of reducing the holding in the Core Accumulation Fund and increasing the holding in the Age 65 Plus Fund after the Member reaches 50 years of age. For more details on derisking of the DIS, please refer to the MPF Scheme Brochure and the KSID of the Scheme. 預設投資策略是一項根據《強制性公積金計劃條例》規定的預設投資安排。預設投資策略透過於不同年齡按照預定配置百分比來投資於核心累積基金與 65 歲後基金及會隨著成員年滿 50 歲後以減持核心累積基金及增持 65 歲後基金來調整風險。有關預設投資策略降低風險機制的詳情，可參閱本計劃之強積金計劃說明書及主要計劃資料文件。
3. A valid investment mandate for the DIS or each selected fund for either the mandatory contributions or the voluntary contributions must be, including but not limited to: 強制性供款或自願性供款的預設投資策略或每項所選基金的有效投資授權必須為，包括但不限於：
   (i) each investment allocation percentage should be an integer and at least 5%, and 每項投資分配百分比須為整數及至少 5%，及
   (ii) all of the investment allocation percentages add up to 100% in total. 全部投資分配百分比的總和等於 100%。
4. In the below events, transfer-in monies from another MPF scheme(s) or Occupational Retirement Scheme(s) ("ORSO scheme(s)") for respective contribution type(s) will be: 就下列情況，你由其他強積金計劃或職業退休計劃轉入之款項的相關供款類[illegible]會：
   (i) **wholly** invested in the DIS if: 全部根據預設投資策略進行投資，如：
      a. you **do not** make any investment choice; or 你不作任何投資選擇；或
      b. you do not give a valid, clear or complete investment mandate including but not limited [illegible] 效、清晰、完整的投資授權，包括但不限於更改位置旁沒有加筆作實；或
      c. the investment allocation percentage of any selected funds is not an integer or at least [illegible]
      d. the total investment allocation percentage of the selected funds is over 100%; or 所選[illegible]
      e. the instruction of any selected funds is unclear or illegible. 任何所選基金指示不清晰或[illegible]
   (ii) **partially** (i.e. the remaining percentage) invested in the DIS if the total investment alloca[illegible] 餘的百分比）根據預設投資策略進行投資，如所選基金的投資分配百分比總和少於 100%。
5. You should note that investment markets could fluctuate significantly. Fund unit prices may go down as well as up. Please carefully consider your own risk tolerance level and financial circumstances (as well as your own retirement plan) before making any investment choices. If in doubt, please contact your financial advis[illegible] 程度及財政狀[illegible]
6. The below inv[illegible] 列投資授權並[illegible]
7. Transfer-in m[illegible] ORSO schem[illegible] 轉入之款項，由職業退休計劃轉入之最低強積金利益及／或最低強積金利益以外的累算權益（如有）將分別根據下列[illegible]或自願性供款比例進行投資：

注意： 提醒客戶分配百分比必須為 5 的倍數 而總和必須為 100 。

注意： 以下2個類別都需要填寫 (如未有自願性供款都需要填寫)，各2個類別的分配百分比總和必須為100 。

DIS / Fund Code 預設投資策略／基金編號	Investment Strategy / Name of Constituent Fund 投資策略／成分基金名稱	Investment Allocation Percentage 投資分配百分比	
		Mandatory Contributions 強制性供款	Voluntary Contributions 自願性供款
Investment Strategy 投資策略			
DS	MPF Default Investment Strategy 強積金預設投資策略 Internal use 內部專用：DIS	%	%
Equity Funds – Index-Tracking Collective Investment Scheme Series [6] 股票基金 – 緊貼指數集體投資計劃系列 [6]			
3G	American Fund 美洲基金	%	%
3E	Eurasia Fund 亞歐基金	50 %	50 %
3F	Hong Kong and China Fund 中港基金	%	%
83	World Fund 全球基金	50 %	50 %
Fixed Income Funds 固定入息基金			
3D	Asian Bond Fund 亞洲債券基金	%	%
63	Global Bond Fund 環球債券基金	%	%
R3	MPF Conservative Fund 強積金保守基金	%	%

Continued on the next page 續下頁

友邦機密及專利資料。嚴禁分發。

C. INVESTMENT MANDATE 投資授權 (Continued 續)

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

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

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

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D. "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE SCHEME 積金易平台及本計劃《收集個人資料聲明》(「聲明」)

Personal Information Collection Statement of The eMPF Platform 積金易平台收集個人資料聲明

eMPF Platform Company Limited may need to collect, process and hold your personal data for the purposes of your enrolment to an MPF scheme and administration of your MPF account. Your personal data may also be used, transferred or disclosed to other parties for purposes as set out in our Personal Information Collection Statement (PICS). If you are already registered with the eMPF Platform, you have already agreed to be bound by our PICS, the latest version of which is set out below. If you are not yet registered, please refer to our PICS set out below. By providing your personal data in this form, you consent to eMPF Platform Company Limited collecting, using and holding your personal data in accordance with our Personal Information Collection Statement. 積金易平台有限公司可能需要收集、處理及持有你的個人資料，用作處理你的強積金計劃登記和你的強積金帳戶管理的用途。你的個人資料亦可能會根據我們的收集個人資料聲明中所列明的用途而被使用、轉移或披露給第三方。若你已註冊積金易平台，即表示你已同意我們的收集個人資料聲明，其最新版本載於下文。若你尚未註冊，請參閱我們以下的收集個人資料聲明。你透過此表格提供個人資料，即表示你同意積金易平台有限公司根據我們的收集個人資料聲明收集、處理及持有你的個人資料。

Personal Information Collection Statement 收集個人資料聲明

向客戶講解積金易平台收集個人資料聲明

This Personal Information Collection Statement (this "**Statement**") is made in accordance with the requirements of the Personal Data (Privacy) Ordinance (Chapter 486 of the Laws of Hong Kong) (the "**PDPO**") and the guidelines issued by the Office of the Privacy Commissioner for Personal Data. This Statement notifies you of the personal data from time to time collected, processed and held by eMPF Platform Company Limited ("**we**", "**us**" or "**eMPF Company**"), the purposes for which your personal data will be used and to whom it may be disclosed, and your rights under the PDPO to access and correct your personal data. 本收集個人資料聲明（本「**聲明**」）是根據《個人資料（私隱）條例》（香港法例第 486 章）（「**《私隱條例》**」）的規定及個人資料私隱專員公署發出的指引而制定。本聲明旨在向你闡釋積金易平台有限公司（「**本公司**」、「**我們**」或「**積金易公司**」）不時收集、處理及持有你的個人資料、有關個人資料的用途和可能獲提供有關個人資料的對象，以及你可根據《私隱條例》查閱及更正有關個人資料的權利。

You may learn more about our policies on the collection, use, transfer, retention and protection of your personal data from our Privacy Policy, which is available at www.empf.org.hk/page/privacy-policy . 你可於本公司的《私隱政策》(www.empf.org.hk/page/privacy-policy) 了解更多關於我們收集、使用、移轉、保留及保護你的個人資料的政策。

1. Personal Data collected and maintained by eMPF Company 積金易公司收集及保存的個人資料

The "electronic MPF system" (as defined in the MPFSO) administered and operated by eMPF Company is designated by the Secretary for Financial Services and the Treasury under the Mandatory Provident Fund Schemes Ordinance (Chapter 485 of the Laws of Hong Kong) (the "**MPFSO**") to, inter alia, provide Mandatory Provident Fund ("**MPF**") scheme administration services to facilitate approved trustees of registered schemes in performing their scheme administration functions. eMPF Company provides such MPF scheme administration services through the "electronic MPF system" and other offline facilities including the service centres, administrative centres and call centres (collectively the "**eMPF Platform**"). Personal data which may from time to time be collected, processed and held by eMPF Company in respect of you includes: 根據《強制性公積金計劃條例》（香港法例第 485 章）（「**《強積金條例》**」），財經事務及庫務局局長指定以積金易公司管理和營運的「電子強積金系統」（定義見《強積金條例》）（其中包括）向強制性公積金（「**強積金**」）註冊計劃的核准受託人提供強積金計劃管理服務，以利便核准受託人執行他們的計劃管理職能。積金易公司通過「電子強積金系統」及其他實體設施，包括服務中心、行政中心以及電話支援服務中心（統稱「**積金易平台**」）提供有關強積金計劃管理服務。積金易公司可能不時收集、處理及持有與你有關的個人資料包括：

a. information which you provide during enrolment to an MPF scheme; 你就參與強積金計劃提供的資料；
b. information which you provide during registration for the eMPF Platform (including, if applicable, an image of your Hong Kong Identity Card and your selfies, which are collectively referred to as "identity verification data") and, regardless of any such registration, when you transact with the eMPF Platform; 你就登記使用積金易平台（包括你的香港身份證的影像及自拍照（統稱為「**身分驗證資料**」）（如適用）），以及你使用積金易平台（無論有否進行登記）進行交易時提供的資料；
c. information disclosed by or transferred from approved trustees of your MPF schemes; 由你的強積金計劃的核准受託人披露或移轉的資料；
d. details of transactions or other dealings in connection with your MPF schemes including, without limitation, information collected to handle your enquiries, complaints, applications, instructions and requests; 你的強積金計劃的交易詳情或其他事務往來，包括但不限於為處理你的查詢、投訴、申請、指示及要求而收集的資料；
e. (processed with your consent if required under the PDPO) information from other third parties and public sources, including but not limited to government authorities; and 來自包括但不限於政府機構的其他第三方或公共來源的資料（如《私隱條例》要求，將在獲得你同意的情況下進行處理）；及
f. information obtained or generated in the course of our performance of scheme administration services and other statutory functions under the MPFSO. 本公司根據《強積金條例》履行提供計劃管理服務及其他法定職能過程中取得或產生的資料。

Please note that personal data and other information requested (except those marked as "optional") must be provided before we can provide you with the relevant service(s) under the eMPF Platform. If you fail to provide such personal data and other information, or if they are inaccurate or incomplete, we may not be able to process your transactions and / or requests, or otherwise provide you with the relevant service. 請注意，本公司只有在取得所有我們要求有關你的個人資料及其他資料（除非標記為「可選填」外）後，方能為你提供積金易平台的相關服務。如你未能提供上述個人資料及其他資料，或該等資料屬不準確或不完整，本公司可能無法處理你的交易及 / 或要求，或為你提供相關服務。

2. Purposes of Collection of Personal Data 收集個人資料的用途

We may collect, process and hold your personal data for the following purposes: 本公司可收集、處理及持有你的個人資料作下列用途：

a. in relation to your identity verification data, to authenticate your identity through eKYC (but not the "iAM Smart" platform and/or the biometric authentication function built in your device) under the eMPF mobile application for accessing the eMPF Platform; 就你的身份驗證資料而言，通過積金易流動應用程式（「**應用程式**」）中的電子身份驗證程序（eKYC）（不涉及「智方便」（iAM Smart）平台及 / 或你裝置內建的生物辨識功能），驗證你的身份以進入積金易平台；
b. to facilitate your access to, and the management of your MPF account; 協助你查閱及管理強積金帳戶；
c. to process, administer and implement your applications, requests or instructions, and to provide you with such services as may from time to time be agreed with the approved trustees of your MPF schemes, all in connection with your MPF schemes; 處理、管理及執行你就強積金計劃所提出的申請、要求或指示，以及根據本公司不時與你的強積金計劃的核准受託人達成的協定，提供有關的服務；
d. for data matching with personal data and other information about you or your employer(s) for scheme administration and other related purposes; 就計劃管理及其他相關用途，與你或你的僱主的個人及其他資料進行比對；

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e. for our internal business and administrative purposes, including but not limited to maintaining the security of the eMPF Platform, improvement of user experience, development of the eMPF Platform, administration of our risk management policies and procedures and for the purpose of compiling statistics and undertaking data analysis and other research; 用作本公司內部業務及行政管理的用途，包括但不限於維持積金易平台的安全、改善用戶體驗、發展積金易平台、執行風險管理政策和程序，以及用作數據統計、資料分析及其他研究用途；
f. to communicate with you, and to provide you with customer services; 與你溝通並為你提供客戶服務；
g. for complying with applicable laws and regulations, and any request or direction of, or responding to requests from, regulators, law enforcement agents or other government authorities; 遵從適用的法律和法規，以及監管機構、執法機關或其他政府部門的任何要求或指示，或回應其要求；
h. for protecting or exercising our rights, including but not limited to dealing with your complaints or inquiries, and taking any legal actions; 保障或行使本公司的權利，包括但不限於處理你的投訴或查詢，以及採取任何法律行動；
i. for handling any legal, regulatory or administrative proceedings, investigations or inquiries before any court or competent authority; 處理任何法庭或主管機關的法律、監管或行政管理程序、調查或查詢；
j. for detecting and preventing crime and other unlawful behaviour; 偵查及阻止犯罪及其他違法行為；
k. for any other purposes or functions from time to time specified or designated under the MPFSO; 《強積金條例》不時訂明或指定的任何其他用途或功能；
l. with your consent (including any indication of no objection), for conducting direct marketing in accordance with Section 4 below, whether for itself or on behalf of approved trustees of your MPF schemes; and 經你同意（包括表示不反對），根據下文第 4 條為本公司或代表你的強積金計劃的核准受託人進行直接促銷；及
m. other purposes directly relating to any of the above. 其他與任何上述內容有直接關係的用途。

3. Classes of Transferees 承轉人類別

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

a. your employers and approved trustees of your MPF schemes; 你的僱主及強積金計劃的核准受託人；
b. our agent, adviser, service provider and contractor who provides administrative, telecommunications, computer, payment, fraud prevention, insurance, data processing, information technology, legal, accounting, operational and/or other services or support to us in connection with the operations of the eMPF Platform; 任何就積金易平台的營運而向本公司提供管理、電訊、電腦、付款、反欺詐、保險、資料處理、資訊科技、法律、會計、營運及／或其他服務或支援的代理人、顧問、服務供應商或承辦商；
c. the Mandatory Provident Fund Schemes Authority（"**MPFA**"）, other government authorities and agencies, courts, regulatory or administrative bodies, law enforcement agencies and other bodies or persons to whom we are under an obligation to make disclosure under any legal, regulatory or administrative requirements applicable to us; and 強制性公積金計劃管理局（「**積金局**」）、其他政府部門及機構、法庭、監管機構或行政管理機構、執法機構及其他機構或人士，如本公司須按照任何適用法律、法規或行政命令向其作出披露；及
d. any other person as agreed with you from time to time. 你不時同意的任何其他人士。

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

4. Direct Marketing 直接促銷

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

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

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

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

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

5. Access and Correction 查閱及更正

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

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

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

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

We may require you to provide identity proof for handling your data access or correction request, and we may charge a fee for complying with your data access request. 處理個人資料查閱或更正的要求時，本公司或會要求你提供身份證明文件，並可就你的資料查閱的要求收取費用。

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6. Miscellaneous 其他事宜

We may update this Statement from time to time, and the most recent version can be found at www.empf.org.hk/pics . We will notify you of any update to this Statement and, where required by the PDPO, obtain your consent. 本公司會不時更新本聲明，最新版本可參閱 www.empf.org.hk/pics。我們會通知你有關本聲明的更新，並在《私隱條例》有要求的情況下取得你的同意。

If there is any inconsistency or ambiguity between the English and Chinese versions of this Statement, the English version will prevail. 如本聲明的中英文版本有任何不一致或歧義，應以英文版本為準。

☐ Please tick the box if you do not agree to provide your consent for your personal data to be used for direct marketing purposes in accordance with the "Direct Marketing" section of the Personal Information Collection Statement of eMPF Platform Company Limited. Your indication herein will replace any indication of choice you may have previously provided to eMPF Platform Company Limited in relation to "Direct Marketing". 若你不同意積金易平台有限公司根據其收集個人資料聲明內的「直接促銷」部分，使用你的個人資料以作直接促銷之用途，請在方格內填上剔號。你在此作出之指示，將取代你先前可能已向積金易平台有限公司提供任何有關選擇「直接促銷」的指示。

向客戶講解AIA 計劃收集個人資料聲明

Personal Information Collection Statement of AIA MPF - Prime Value Choice 友邦強積金優選計劃收集個人資料聲明

AIA Company (Trustee) Limited (the "**Company**", "**we**", "**us**" or "**our**") is a wholly owned subsidiary of AIA Group Limited. AIA Group Limited, together with its subsidiaries and affiliates are collectively referred to in this Statement as the "AIA Group" and individually referred to as an "**AIA Entity**".
友邦（信託）有限公司（「**本公司**」、「**我們**」）乃友邦保險控股有限公司的全資附屬公司。在本聲明內，友邦保險控股有限公司連同其附屬公司及聯營公司將統稱為「**友邦集團**」並單獨稱為「**友邦機構**」。

From time to time, it is necessary for you, as (prospective) participating employers ("**Participating Employers**") and/or members ("**Members**") (collectively referred to as "**you**" or "**your**"), to provide the Company with certain personal data relating to you in connection with the application for and provision of pension schemes as well as the carrying out by the Company of other services relating to the pension schemes. Failure to supply such data may result in the Company being unable to process your application for pension schemes or to provide or continue to provide the pension schemes and/or relevant services to you. During the course of your relationship with the Company, further personal data relating to you, may also be collected in the ordinary course of our business. If you provide personal data to the Company about another individual, you confirm that you are either (i) the parent or legal guardian of the individual, or (ii) you have obtained the individual's consent to provide his or her personal data to the Company, and for such personal data to be used, processed, disclosed and transferred in accordance with this Statement.
在閣下申請及由本公司提供退休金計劃，及當本公司提供與該等退休金計劃及服務相關之其他服務時，作為（準）參與僱主（「**參與僱主**」）及／或成員（「**成員**」）（統稱「**閣下**」），閣下必須不時向我們提供若干關於閣下的個人資料。若閣下未能提供該等資料，可能會令本公司無法處理閣下的退休金計劃申請或向閣下提供或繼續提供退休金計劃及／或相關服務。在閣下與本公司的日常業務過程中，本公司亦可能會在日常業務運作的過程中收集關於閣下的其他個人資料。若閣下向本公司提供關於其他人士的個人資料，閣下確認閣下是 (i) 該名人士的父母或法定監護人，或 (ii) 閣下已獲得該名人士的同意，向本公司提供該人士的個人資料，並同意該等個人資料可根據本聲明被使用、處理、披露及轉移。

(1) PURPOSES FOR COLLECTING PERSONAL DATA 個人資料收集目的

Personal data relating to you held or collected by the Company (including but not limited to credit information and claims history) may be used by the Company for the following purposes ("**Purposes**"):
本公司所持有或收集的有關閣下的個人資料（包括但不限於信用資料及以往申索紀錄）可能會被本公司用作下列用途（「**訂明用途**」）：

(i) processing, accepting and/or rejecting applications for Pension Schemes (as defined below);
處理、接受及／或拒絕該等退休金計劃（如下文定義）的申請；

(ii) the administration and/or management of or in connection with the contributions or benefits or accounts in respect of the Participating Employers and/or Members under the pension schemes (the "**Pension Schemes**") administered by AIA Entities;
由友邦機構執行的退休金計劃（「**該等退休金計劃**」）下參與僱主及／或成員的供款、權益或帳戶的執行及／或管理，或與其供款、權益或帳戶相關的執行及／或管理；

(iii) providing Pension Schemes and related services to you, and processing requests made by you, from time to time in relation to the Pension Schemes and related services, including but not limited to making contributions, transfer of benefits, switching of pension funds and withdrawal of benefits;
為閣下提供該等退休金計劃及相關服務，並處理閣下不時就該等退休金計劃及相關服務提出的要求，包括但不限於作出供款、轉移權益、退休基金轉換及提取權益；

(iv) subject to your consent, conducting direct marketing activities of pension products and related services offered by AIA Entities as described in paragraph (3) below;
如已取得閣下同意，進行下文第 (3) 段所述友邦機構提供的退休金產品及相關服務的直接促銷活動；

(v) performing functions and activities incidental to the provision of Pension Schemes and related services, including, without limitation, reporting, maintenance of online and other services, identity verification, data analysis, research and statistical analysis;
執行與所提供的該等退休金計劃及相關服務相關的功能及活動，包括但不限於報告、維持網上及其他服務、核實身份、資料分析、研究及統計分析；

(vi) improving and furthering the provision of Pension Schemes and related services (including through customer research or surveys) offered by AIA Entities, subject to applicable legislation;
在適用法例規限下，提升及進一步提供由友邦機構提供的該等退休金計劃及相關服務（包括透過客戶研究或調查）；

(vii) complying with the obligations, requirements and/or arrangements for disclosing and using data that bind on or apply to the Company and/or the AIA Group or that the Company and/or the AIA Group is expected to comply with according to:
履行根據下列各項對本公司及／或友邦集團具有約束力或適用或期望本公司及／或友邦集團遵守的就披露及使用資料的義務、要求及／或安排：

(a) any law binding on or applying to it within or outside the Hong Kong Special Administrative Region ("**Hong Kong**") existing currently and in the future (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information);
不論於香港特別行政區（「**香港**」）境內或境外及不論目前或將來存在的對其具法律約束力或適用的任何法律（例如稅務條例及當中的條款，包括與自動交換財務帳戶資料相關的條款）；

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(b) any guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of insurance or financial services providers within or outside Hong Kong existing currently and in the future (e.g. guidelines or guidance given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information); or
不論於香港境內或境外及不論目前或將來存在的任何法律、監管、政府、稅務、執法或其他機關，或保險或金融服務供應商的自律監管機構或行業組織或協會所作出或發出的任何指引（例如稅務局作出或發出的指引，包括與自動交換財務帳戶資料相關的指引）；或

(c) any present or future contractual or other commitment with local, national or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of insurance or financial services providers that is assumed by or imposed on the Company or the AIA Group by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations;
本公司或友邦集團因其位於或跟相關本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或保險或金融服務供應商的自律監管機構或行業組織或協會的司法管轄區有關的金融、商業、業務或其他利益或活動，而向該等本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或有關的自律監管機構或行業組織或協會承擔或被施等施加的任何目前或將來的合約或其他承諾；

(viii) complying with any obligations, requirements, policies, procedures, measures or arrangements for sharing data and information within the AIA Group and/or any other use of data and information in accordance with any group-wide programs for compliance with sanctions or prevention or detection of money laundering, terrorist financing or other unlawful activities;
遵守友邦集團為符合制裁或預防或偵測洗黑錢、恐怖分子融資活動或其他非法活動的任何方案就於友邦集團內共用資料及數據及／或資料及數據的任何其他使用而指定的任何義務、要求、政策、程序、措施或安排；

(ix) enabling an actual or proposed assignee, transferee, participant or sub-participant of the Company's rights or business (or portions thereof) to evaluate or carry out the transaction intended to be the subject of the assignment, transfer, participation or sub-participation; and
允許本公司的權利或業務的實際或建議承讓人、受讓人、參與人或附屬參與人，就擬涉及的轉讓、出讓、參與或附屬參與的交易（或其部分）進行評估或執行有關交易；及

(x) any other purposes relating to the purposes listed above.
與上述用途有關的其他用途。

(2) TRANSFER OF PERSONAL DATA
個人資料的轉移

Personal data held by the Company relating to you will be kept confidential but the Company may provide such data to the following parties, whether inside or outside of Hong Kong, to fulfil the Purposes set out above in paragraph (1) of this Statement:
本公司所持有關於閣下的個人資料將會保密，但本公司可能會向以下各方，不論於香港境內或境外，提供該等資料以符合本聲明以上第 (1) 段所列出的訂明用途：

(i) any agent, contractor or third party service provider who provides services to the Company in connection with the operation of its pension business including administrative, telecommunications, computer, payment, data processing, storage, customer research or survey or other services in connection with the operation of the Pension Schemes;
就退休金業務運作向本公司提供服務的任何代理人、承包人或第三方服務供應者，包括行政、電訊、電腦、付款、資料處理、儲存、客戶研究或調查或其他與該等退休金計劃運作相關的服務；

(ii) relevant Participating Employers (if applicable);
相關參與僱主（如適用）；

(iii) any person or entity to whom the Company or the AIA Group is under an obligation or otherwise required to make disclosure under the requirements of any law or rules, regulations, codes of practice, guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations binding on or applying to the Company or the AIA Group or with which the Company or the AIA Group is expected to comply, or to establish, exercise or defend or to protect legal claims, to protect the rights, property or safety of the Company or the AIA Group, or any disclosure pursuant to any contractual or other commitment of the Company or the AIA Group with local, national or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations, all of which may be within or outside Hong Kong and may be existing currently and in the future;
本公司或友邦集團根據法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織或協會所作出或發出對本公司或友邦集團具有約束力或適用或期望其遵守的法律或規則、規例、實務守則、指引或為建立、行使或捍衛或保護法律索償、保護本公司或友邦集團的權利、財產或安全，或根據本公司或友邦集團向本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織或協會的任何合約或其他承諾（以上不論於香港境內或境外及不論目前或將來存在的），而有義務或以其他方式被要求向其作出披露的任何人士或機構；

(iv) AIA Entities;
友邦機構；

(v) any actual or proposed assignee, transferee, participant or sub-participant of the Company's rights or business; and
本公司的權益或業務的任何實際或建議承讓人、受讓人、參與人或附屬參與人；及

(vi) any persons who/which you have given instructions, authorization and consent to the Company in order to communicate with and provide information to them.
任何閣下已發出指示、授權及同意本公司向其溝通及提供資料的人士。

From time to time, AIA Group or the Company may purchase a business or sell one or more of the Company's business(es) (or portions thereof). In the event that AIA Group or the Company purchase(s) a business, the personal data received with that business would be treated in accordance with this Statement, if it is practicable and permissible to do so. In the event that AIA Group or the Company sell(s) a business, provisions will be included in the selling contract requiring the purchaser to treat your personal data in the same manner required by this Statement.
友邦集團或本公司可能不時收購業務或出售一項或多項本公司業務（或其部分）。如友邦集團或本公司收購業務，若情況可行及允許，該業務下接收的個人資料將會根據本聲明處理。如友邦集團或本公司出售業務，銷售合約中將包含要求買方按本聲明所要求的的方式處理閣下的個人資料之條款。

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(3) USE AND PROVISION OF PERSONAL DATA IN DIRECT MARKETING
在直接促銷中使用及提供個人資料

Subject to your consent, the Company may use your personal data we collected for direct marketing of Pension Schemes and related services as described below:
如本公司已取得閣下同意，本公司可以把我們收集的閣下之個人資料用於該等退休金計劃及相關服務的直接促銷如下所述：

(i) your name, your contact details, products and services portfolio information, transaction pattern and behaviour, financial background and demographic data of you collected by the Company from time to time may be used by the Company in direct marketing; and
本公司可以把本公司不時收集的閣下之姓名、閣下之聯絡資料、產品及服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷；及

(ii) the pension products and related services offered by AIA Entities may be marketed.
可以就友邦機構提供的退休金產品及相關服務進行促銷。

If you do not wish the Company to use your personal data we collected for direct marketing of pension products and related services, you may exercise your opt-out right by notifying the Company. To exercise your opt-out right, you may write to the Data Protection Officer of the Company at the address and email address provided in paragraph (4) of this Statement, or provide the Company with your opt-out choice in the relevant application form (if applicable).
如閣下不希望本公司使用本公司收集的閣下之個人資料作退休金產品及相關服務的直接促銷，閣下可通知本公司以行使閣下的拒絕促銷選擇權。如欲行使拒絕促銷選擇權，閣下可根據本聲明第(4)段所提供的地址及電郵以書面向本公司的資料保障主任提出有關要求，或於有關的申請表格內向本公司表達閣下拒絕促銷的意願（如適用）。

(4) DATA ACCESS AND CORRECTION RIGHT
查閱及改正資料權利

In accordance with the Personal Data (Privacy) Ordinance (the "**Ordinance**"), you have the right to request access to and the correction of any of your personal data held by the Company, by writing to the Data Protection Officer of the Company at the following address and email:
根據個人資料（私隱）條例（「**條例**」）規定，閣下有權要求查閱及更正任何本公司持有閣下的個人資料，請以書面經以下地址及電郵向本公司的資料保障主任提出：

The Data Protection Officer
AIA Company (Trustee) Limited
c/o AIA International Limited (as administrator)
12/F, AIA Tower, 183 Electric Road,
North Point,
Hong Kong
Email: AIAHK.Compliance@aia.com

資料保障主任
友邦（信託）有限公司
轉交友邦保險（國際）有限公司（作為管理人）
香港北角電氣道 183 號友邦廣場 12 樓
電郵：AIAHK.Compliance@aia.com

According to the Ordinance, the Company has the right to charge a reasonable fee for the processing of any data access request.
根據條例，本公司有權就處理任何查閱資料要求收取合理費用。

(5) You also have the right to request for the Company's policies and practices in relation to personal data and to be informed of your personal data that is held by the Company by writing to the Company's Data Protection Officer at the address and email provided in paragraph (4) of this Statement.
閣下亦有權根據本聲明第(4)段所提供的地址及電郵向本公司的資料保障主任索取本公司有關個人資料私隱的政策及實務運作資料，並獲告知本公司持有的閣下之個人資料。

(6) Nothing in this Statement shall limit your rights under the Ordinance.
本聲明不會限制閣下在條例下所享有的權利。

(7) The Company retains the right to change this Statement.
本公司保留修改本聲明的權利。

(8) A Privacy Addendum under the Personal Information Protection Law of the People's Republic of China supplements this Statement and is available at https://www.aia.com.hk/en/privacy-statement-main. The Privacy Addendum applies to you if you are within mainland China.
根據中華人民共和國《個人信息保護法》而訂立的私隱附錄就本聲明進行補充，並可在以下網址下載：
https://www.aia.com.hk/zh-hk/privacy-statement-main。若閣下正身處中國大陸，該私隱附錄將適用於閣下。

☐ Please tick the box if you do not agree to provide your consent for (i) eMPF Platform Company Limited to transfer your personal data to the Trustee of the MPF scheme in which you enrol; and (ii) such Trustee to transfer your personal data to the Sponsor of the MPF scheme in which you enrol for direct marketing purposes in accordance with (a) the Personal Information Collection Statement of eMPF Platform Company Limited; and (b) the Personal Information Collection Statement of such Trustee. 若你不同意 (a) 積金易平台有限公司根據其收集個人資料聲明及 (b) 你所登記的強積金計劃受託人根據其收集個人資料聲明部分 (i) 轉移你的個人資料予你所登記的強積金計劃的受託人，及 (ii) 該受託人轉移你的個人資料予你所登記的強積金計劃的保薦人，作直接促銷之用途，請在方格內填上剔號。

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E. AUTHORIZATION AND DECLARATION 授權及聲明

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

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

Signature of Member ^ 成員簽署 ^	Date 日期
Peter Chan	31 / 10 / 2025 DD 日 / MM 月 / YYYY 年

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

✦ Warning 警告:

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

友邦機密及專利資料。嚴禁分發。

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MISCELLANEOUS 其他

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

View latest fund fact sheet
閱讀最新一期基金資料概要



OR visit aia.com.hk

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



OR visit aia.com.hk

友邦機密及專利資料。嚴禁分發。

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CHECKLIST OF APPLICATION DOCUMENTS 申請文件清單

MPF account setup may be affected if you do not submit all required document(s) and information. The Trustee reserves the right to request additional information and documents for the purpose of complying with regulatory requirements. 如你未能提供全部所需文件及資料，可能會影響開立此強積金帳戶。受託人保留索取更多資料及文件的權利，以作遵守監管規定之目的。

1. Copy of HKID Card / Passport 香港身份證／護照副本 (For Hong Kong non-permanent resident, please enclose a copy of Passport. 如非香港永久性居民，請附上護照副本。)

Submission Channels 遞交途徑	Enquiries 查詢
1. Post: PO Box 98929 Tsim Sha Tsui Post Office 郵寄：尖沙咀郵政局郵政信箱 98929 號	1. eMPF Customer Service Hotline 積金易客戶服務熱線：183 2622
2. Drop-in Box in any one of the eMPF Service Centres below 下列任何一間積金易服務中心的投遞箱	2. Email address 電郵地址：enquiry@support.empf.org.hk
3. Email address 電郵地址：forms@support.empf.org.hk	3. Fax 傳真：3197 2922
4. Fax 傳真：3197 2988	
Please do **NOT** submit duplicate copies to avoid duplication. 請勿遞交相同表格，以免重複。	

eMPF Service Centres Address & Service Hours 積金易服務中心地址及服務時間

Hong Kong Island 香港島	Kowloon 九龍	New Territories 新界
Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong 香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室	Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon 九龍尖沙咀東部麼地道 77 號華懋廣場 12 樓 1205-6 室	Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories 新界荃灣楊屋道 8 號如心廣場第 2 座 18 樓 1802A 室

Service Hours 服務時間：

Monday to Friday	星期一至五	9:00 am – 6:00 pm	上午 9 時 至 下午 6 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

eMPF Customer Service Hotline Service Hours 積金易客戶服務熱線服務時間

Monday to Friday	星期一至五	9:00 am – 7:00 pm	上午 9 時 至 下午 7 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

MPF INTERMEDIARY DETAILS 強積金中介人資料 (For MPF Intermediary Use Only 只供強積金中介人填寫)

Intermediary Name 1 中介人名稱 1: Wong Man Kit	Intermediary Name 2 中介人名稱 2:
MPF Registration No. 強積金註冊編號: 123456	MPF Registration No. 強積金註冊編號:
Agent / Broker Code. 經紀／代理人編號: A0001	Agent / Broker Code. 經紀／代理人編號:

!!!重要提示!!!

如使用此積金易表格，需額外提交友邦強積金客戶聲明及同意書至AIA
此申請表格及簽名核實證明文件（SV）則提交至積金易平台

友邦機密及專利資料。嚴禁分發。

填寫個人賬戶申請表格之常見錯誤

文件類型	常見錯誤
個人賬戶申請表格	• 所提供的身份證明文件副本上的國籍與成員申請表格的國籍不符 • 欠缺香港身份證/護照副本 • 欠缺職業/職銜/業務性質 • 欠清晰香港/身份證/護照副本

友邦機密及專利資料。嚴禁分發。

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友邦強積金優選計劃
自僱人士申請表格(SEPA)
範例及常見錯誤與建議

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

eMPF 積金易

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

SEPA

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

eMPF Web Portal 積金易網上平台

Internal use only 內部專用

eMPF Received Date:

SEPA

Important Notes 重要事項：

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

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

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

A. MEMBER PARTICULARS 成員資料

(1) Scheme Details 計劃資料

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

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

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

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

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

Surname in English 英文姓氏 **CHAN**

Given Name in English 英文名字 **TAI MAN** ("the Member")

Name in Chinese 中文姓名 (Surname 姓氏) **陳** (Given Name 名字) **大文** (「成員」)

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(4) Date of Birth [1] 出生日期 [1] 28 / 08 / 1988 DD / MM / YYYY 日／月／年

(5) Gender 性別 ☑ Male 男 ☐ Female 女

[1] If the Member's HKID Card only contains the year of birth and the Member has no other form of identification to prove the exact date of birth (e.g. Birth Certificate or Passport), the eMPF Platform shall adopt 31 December as the Member's birthday. Likewise, if the Member's HKID Card contains only year and month but not the day of birth, the eMPF Platform shall adopt the last day of the month as the birthday. If the Member leaves the month and / or day blank, the eMPF Platform shall follow the above rules to adopt the date of birth as the last day of that month or 31 December. 如成員的香港身份證上只有出生年份，而成員沒有其他證件證明實際出生日期（例如出生證明書或護照），積金易平台將以年份之12月31日作為成員的出生日期。同樣，如成員的香港身份證上只有出生年份及月份而沒有註明出生日子，積金易平台將以有關月份的最後一天作為成員 … 即定為該月的最後一天或12月31日。

記得附上香港身份證 / 護照副本

(6) Identification 身分證明

☑ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

小提示：如客戶同時擁有香港地區以外的稅務居民身份，需填寫D(2)稅務資料

Document No. 證件號碼 Y1234567

如: 中國香港 / 中國內地 / 美國 / 澳洲

(7) Nationality 國籍

(8) Place of Birth 出生地點 (Not compulsory 可不填寫) 香港

(9) Mobile Phone No. 手提電話號碼 (To provide member up-to-date MPF account information, this field is mandatory. 為提供最新強積金帳戶資料予成員，此欄位必須填寫。) 852 (Country / Area Code * 國家／地區編號 *) 62342345

* SMS (if applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊（如適用）只發送至香港手提電話號碼。如未有提供國家／地區編號，將預設為「香港 (852)」。

(10) Secondary Telephone No. 第二聯絡電話號碼 (Country / Area Code * 國家／地區編號 *)

(11) Email Address 電郵地址

chantaiman123@gmail.com

(12) Residential Address 居住地址 (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室: C

Floor 層數: 30

Block 座: 2

Building / Estate 大廈／屋苑: 開心大廈

Street (Street No. and Street Name) 街道 (街號及街道名稱): 開心路10號

District Area 區域: 上環

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *

Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

(13) Correspondence Address 通訊地址

(If different from the above Residential Address, please provide either English OR Chinese address 如與上述居住地址不同，請提供英文或中文地址)

Flat / Room 單位／室

Floor 層數

Block 座

Building / Estate 大廈／屋苑

Street (Street No. and Street Name) 街道 (街號及街道名稱)

District Area 區域

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *

Country * / Region * 國家 * ／地區 *

Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

友邦機密及專利資料。嚴禁分發。

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B. BUSINESS DETAILS 營業資料

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

此欄不是必填，持有商業登記證之無限公司擁有人則需要填寫

English ABC Company

中文 ABC 公司

(2) Organisation Type 機構類別

選擇該公司合適選項

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

(3) Registration Type 註冊類別

選擇該公司合適選項

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

Business / Other Registration No.[2] 商業／其他註冊證號碼[2] 12345678999 Branch No.[2] 分行號碼[2] 900

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

(4) Nature of Business 業務性質

選擇合適業務性質

- [ ] (i) Catering 餐飲業
- [ ] (ii) Cleaning 清潔業
- [ ] (iii) Community / Social / Personal Services 社區／社會／個人服務業
- [ ] (iv) Construction 建造業
- [ ] (v) Finance / Insurance / Real Estate / Business Services 金融／保險／地產／商用服務
- [x] (vi) Hairdressing and Beauty 理髮及美容業
- [ ] (vii) Manufacturing 製造業
- [ ] (viii) Security Guard Services 保安服務業
- [ ] (ix) Transportation 運輸業
- [ ] (x) Wholesale / Retail / Import and Export Trades 批發／零售／出入口貿易
- [ ] (xi) Others, please specify 其他，請註明：

(5) Job Title 職銜 髮型師

(6) Business Address 業務地址 (If any 如有)

(Please provide either English OR Chinese address and the address must be the same as shown on Business Registration Certificate 請提供英文或中文地址及地址必須與商業登記證相符)

Flat / Room 單位／室 201 Floor 樓數 2 Block 座

Building / Estate 大廈／屋苑 發達大廈

Street (Street No. and Street Name) 街道 (街號及街道名稱) 發達路10號

District Area 區域 中環

- [x] Hong Kong 香港
- [ ] Kowloon 九龍
- [ ] New Territories 新界

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City ◆
城市 ◆

Postal code ◆
郵政編號 ◆

◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

填寫首個計劃年度–即參與計劃日期為此月份之首天至最接近的計劃年度結束日。之後填寫第二個計劃年度–緊接的12月1日至翌年的11月30日

C. SCHEME AND CONTRIBUTION DETAILS 計劃及供款詳情

(1) Date of Joining the Scheme 參加計劃日期 01/12/2025 DD / MM / YYYY 日／月／年

(2) Self-employed Person Business Commencement Date 自僱人士業務生效日期 01/08/2022 DD / MM / YYYY 日／月／年

(3) Relevant Income Information 有關入息資料

(i) Relevant income 有關入息

客戶需根據其入息資料✓其中一個合適選項，並根據相關選擇填寫資料

Please choose ONE relevant income declar… …culation of mandatory contributions. If you do not specify your choice, relevant income will be defaulted at maximum level … will calculate and process the actual contribution amount based on the provided relevant income, rounding off to the nea… …mal places. 請選擇一項有關入息聲明選項以計算強制性供款。如你沒有作任何指示，有關入息將設定為最高有關入息水平，積金易平台將…… 提供的有關入息，以四捨五入至最接近的兩個小數位計算及處理實際的供款額。

☑ a. Contribute based on … …that this maximum relevant income level is subject to change of legislation from time to time. 根據最高有關入息水平供款，現時為每月港幣30,000元或每年港幣360,000元；及本人明白最高有關入息水平可隨法例更改而不時變動。

選項1：按最高有關入息（即每月 HKD30,000 或每年 HKD360,000）

☑ b. C… …最近期評稅通知書所載之應評稅利潤供款，即：

選項2 ：按「利得稅」/「個人入息課息」的評稅通知，需提供副本證明

HKD 港幣 _____ 元

填寫金額

(Please provide a copy of Notice of Assessment of "Profits Tax" or "Personal Assessment" as evidence of your relevant income, Notice of Assessment of "Salaries Tax" is not accepted. 請提供「利得稅」或「個人入息課稅」之評稅通知書副本作為有關入息證明，恕不接受「薪俸稅單」。)

☑ c. Lo… …ceding year of assessment calculated in accordance with Part 4 of the Inland Revenue Ordinance (Cap. 112), which is: 本人聲明本人的有關入息相等於上一個課稅年度根據《稅務條例》(第 112 章)第 4 部分計算的應評稅利潤，即：

選項3：可按上一個課稅年度計算的應評稅利潤

HKD 港幣 _____ 元

填寫金額

如選選項3, 需符合以下其中原因之一:

I understand that this option will only be applicable under the following three circumstances: 本人明白此選項只適用於以下三種情況：

- The issue date of my most recent Notice of Assessment is more than 24 months from the date on which the notice is presented as evidence of relevant income. 本人最近期評稅通知書的發出日期，與本人出示該通知書為本人有關入息證明的日期之相距超過 24 個月。
- I have objected to / appealed against my most recent Notice of Assessment. 本人已就本人最近期評稅通知書提出反對／上訴。
- I am unable to provide my most recent Notice of Assessment. 本人未能出示本人最近期評稅通知書。

☑ d. Sinc… …within the meaning of section 25 of the Inland Revenue Ordinance (Cap. 112). 根據本人未能提供本人之入息證明，本人聲明本人的年度有關入息相等於根據《稅務條例》(第 112 章)第 28 條所指的現行基本免稅額。

選項4：未有入息證明，其年度有關入息相等於基本免稅額(2024/25年度HKD132,000)

☑ e. N… …the Inland Revenue Ordinance (Cap. 112), there will be no relevant income for mandatory contributions. 根據《稅務條例》(第 112 章)第 4 部分所界定，因本人經營的業務在上一財政期內要受淨虧損，故沒有適用的有關入息作強制性供款。

選項5：由於其業務於上一財政年度受淨虧損，沒有適合入息作強制性供款

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

☐ (i) Annually 每年 (i.e. Contribution period is from 1 December to 30 November of each year and contribution day will be set as the last day of the Scheme Financial Year, i.e. 30 November of each year 即供款期由每年 12 月 1 日至 11 月 30 日及供款日將定為計劃財政年度的最後一日，即每年的 11 月 30 日)

☐ (ii) Monthly 每月 (i.e. Contribution period is from the first day to the last day of each calendar month and contribution day will be set as the last day of each calendar month 即供款期由每個公曆月的首日至…

供款模式：✓其中一個合適選項，選擇按年 / 按月供款

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

☑ Voluntary Contributions Commencement Date 自願性供款生效日期 01/11/2025 DD / MM / YYYY 日／月／年

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

(ii) Regular Contribution 定期供款

選擇其中一個合適選項及填寫 / 百分比

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

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

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如沒有自願性供款則可略過以下(5)

(iii) Source of Fund 資金來源

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

選擇其中一個合適選項及提供資金來源證明文件

☐ a. Salary 薪金
- Monthly salary 月薪

☑ b. Personal savings 個人儲蓄
- Name of bank 銀行名稱: XXX Bank
- Total amount 總金額: HKD XXXXXXXXXXX

☐ c. Investment holdings 持有投資
- Description of investment 投資說明
- Value of investment 投資價值

☐ d. Inheritance 遺產
- Details of the inheritance 遺產詳情
- Date received the inheritance 繼承遺產日期
- Inheritance amount 遺產金額

☐ e. Sale of property 出售物業
- Address of property 物業地址
- Sales proceeds 出售收益
- Date of sale 出售日期

☐ f. Maturing investments or insurance policy 投資或保單到期
- Description of investment 投資說明
- Proceeds received from the investments or policy 從投資或保單所得的款項
- Date of maturity 到期日

☐ g. Others 其他
- Nature of the income / wealth 收入／財富的性質
- Received amount 所收金額
- Date of receipt 收款日期

(6) Payment Method 付款方法

付款方法：✓其中一個合適選項，直接扣帳 / 支票 / 電子途徑

Please choose appropriate option(s) and provide payment information (if applicable). If no option is chosen, payment method will be defaulted as by "Cheque" without prior notice. 請揀選適當選項及提供付款資料 (如適用)。如沒有就付款方法作出選擇，付款方法將預設為「支票」及不作另行通知。

☐ (i) Direct Debit 直接扣賬

如選擇直接扣帳，需附上「直接付款授權表格」作申請，需時3-6星期

- The setup of direct debit takes approximately 3 to 6 weeks from the receipt date of your completed "Direct Debit Authorization" ("DDA Form"). The eMPF Platform will send you a confirmation notifying you the success of direct debit setup. Please download "DDA Form" via visiting the website of the eMPF Platform (https://empf.org.hk/forms/en) or scanning the QR code and complete "DDA Form". 設立直接扣賬由收到完整「直接付款授權」(「直接付款授權表格」) 起計，約需時三至六個星期。積金易平台將會發出確認書，通知你有關直接扣賬申請成功設立。請透過瀏覽積金易平台的網頁 (https://empf.org.hk/forms) 或掃描二維碼下載及填寫「直接付款授權表格」。
- As the setup of direct debit takes time, you may make the contribution by other payment method until the direct debit has been set up and provide payment information below (if applicable). 由於設立直接扣賬需時，你可以其他付款方法繳付供款直至直接扣賬成功設立及提供下列付款資料 (如適用)。
- Monthly and annually direct debit day will be defaulted to the 22nd of the month and 22nd of November of the year respectively. If the direct debit day falls on a Saturday, a public holiday, a gale warning day or black rainstorm warning day, it will be the following working day. 每月及每年直接扣賬日分別將預設為每月的 22 日及每年的 11 月 22 日。如直接扣賬日為星期六、公眾假日、烈風或暴雨警告日，則順延至隨後的工作天。
- Please note that the monthly direct debit date may vary due to the transactional arrangement of the relevant bank. 請注意每月直接扣賬日期或會因有關銀行的交易安排而有所不同。

Form Centre 表格中心

☐ (ii) Cheque 支票

a. Payment Means 付款途徑

不接受期票

☐ 1. Cheque 支票
- Please enclose a crossed cheque in your name and made payable to "AIA Co (Trustee) Ltd – Prime". 請附上由你簽發的劃線支票，抬頭訂「友邦 (信託) 有限公司－優選」。
- Post-dated cheques are not accepted. 恕不接受期票。
- Please note that MPF intermediaries are not authorized to receive MPF cheques on behalf of the eMPF Platform. You are particularly reminded to arrange submission to the eMPF Platform directly. 請注意強積金中介人並非收取強積金供款支票的正式途徑，你應直接遞交供款及有關文件予積金易平台。

友邦機密及專利資料。嚴禁分發。

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b. Payment Details 付款詳情

1. Cheque No. 支票號碼 **123456789**

2. Payment Amount HKD 付款金額 港幣 **XXX** 元

☐ (iii) Electronic Means 電子途徑

a. Payment Means 付款途徑

☐ 1. Direct Credit 直接入帳

- Please make payment via online banking / mobile banking app / phone banking (as applicable). Please check the bank account no. of the Scheme with the Trustee (if applicable). 請透過網上銀行／銀行流動應用程式／電話理財（適用者為準）繳付款項。請向受託人查詢計劃的銀行戶口號碼（如適用）。

☐ 2. PPS 繳費靈

- Please make payment and input the merchant code of the Scheme (i.e. 6347) via visiting website at www.ppshk.com / using "PPS on Mobile" app (as applicable); or 請透過瀏覽網址 www.ppshk.com／使用「繳費靈手機服務」應用程式（適用者為準）繳付款項並輸入計劃的商戶編號（即 6347）；或
- Please make payment and input the merchant code of the Scheme (i.e. 6347) via calling 18031. 請透過致電 18033 繳付款項並輸入計劃的商戶編號（即 6347）。

☐ 3. Bill Payment 繳付帳單

- Please make payment via bill payment services of the designated bank(s) of the Trustee (i.e. Bank of China (Hong Kong) / HSBC). For details, please check with the designated banks for the scope of services. 請透過受託人指定銀行所提供的繳付帳單服務以繳付款項（即中國銀行（香港）／滙豐銀行）。請向指定銀行查詢有關服務範圍詳情。

b. Payment Details 付款詳情

1. Transaction Reference No. 交易參考編號 **123456789**

2. Payment Amount HKD 付款金額 港幣 **XXX** 元

- Please fill in transaction reference no. and provide relevant supporting document / payment slip together with this application (if applicable). Otherwise, the eMPF Platform may require additional processing time for payment processing. 請填寫交易參考編號及連同此申請表一併提供相關證明文件／付款收據（如適用）。否則，積金易平台可能需要額外時間處理款項。

D. SELF-CERTIFICATION OF TAX RESIDENCY AND TAXPAYER IDENTIFICATION NUMBER OR ITS FUNCTIONAL EQUIVALENT ("TIN") [3]
稅務居民身分自我證明及稅務編號或具有等同功能的識辨編號（「稅務編號」）[3]

- This is a self-certification provided by you to the Trustee for the purpose of Automatic Exchange of Financial Account Information ("AEOI") in compliance with tax law and regulations (including but not limited to the Inland Revenue Ordinance (Cap. 112) and regulations based on the Organisation for Economic Cooperation and Development ("OECD") Common Reporting Standard ("CRS") for automatic exchange of information). 這是你向受託人提供的自我證明，以作自動交換財務帳戶資料用途以遵守稅務法律及規例（包括但不限於《稅務條例》（第 112 章）及根據自動交換資料有關的經濟合作與發展組織（「OECD」）《共同匯報標準》（「CRS」）的規則）。
- The information provided by you in this part will be updated by the eMPF Platform for all your MPF account(s) maintained in the eMPF Platform for the purpose of AEOI and CRS. 你於本部分提供的資料將會更新你於積金易平台保存的所有強積金帳戶用作自動交換財務帳戶資料及「共同匯報標準」的用途。
- Each jurisdiction has its own rules for defining tax residence, and various jurisdictions provide information on how to determine if you are resident in that particular jurisdiction for tax purposes. In general, you will find that your jurisdiction of tax residence is the jurisdiction / country in which you live. Special circumstances may cause you to be resident elsewhere or resident in more than one jurisdiction / country at the same time (dual residency) for tax purposes. For more information on jurisdiction of tax residence, please consult your tax adviser or the information at the OECD automatic exchange of information portal (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/). 每個稅務管轄區會按照其稅務法律訂定稅務居民的定義，並提供相關資料讓你判定是否屬某一稅務管轄區的稅務居民。一般而言，你的稅務居留司法管轄區／國家會根據你的居住地點而定。因此，如你有多於一處居所（雙重居住地），你可能會同時成為多個稅務管轄區／國家的稅務居民。有關稅務居民身分的更多資訊，請諮詢你的稅務顧問或瀏覽 OECD 的自動交換資料網頁（http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/）。
- If you are tax resident in a reportable jurisdiction [4] of Hong Kong, you will be classified as a reportable person for AEOI, the Trustee will be legally obliged to pass on the information provided in this self-certification and other financial information with respect to your account(s) to the Hong Kong Inland Revenue Department ("IRD"), and they will transmit this information to the tax authorities of which you are tax resident. 如你的稅務居民所在地屬香港申報稅務管轄區[4]，你將會被界定為自動交換資料下的申報對象，受託人在法律上有義務將你於本自我證明中報的資料，你財務帳戶有關的某些財務資料轉交予香港稅務局，而相關資料或會與你作為稅務居民所屬的稅務機關交換。
- The member particulars, including but not limited to member name, identification document no., date of birth, residential address and correspondence address, provided in Part A forms part of this self-certification. 於 A 部分提供的成員資料，包括但不限於成員姓名、身分證明文件號碼、出生日期、居住地址及通訊地址，會成為本自我證明的一部分。
- This self-certification will remain valid unless there is any change in circumstances relating to information that makes this self-certification incorrect, inaccurate or incomplete. You must notify the eMPF Platform / the Trustee and provide an updated self-certification within 30 days of such change in circumstanoes. 除非情況有所改變而引致已提交的自我證明上的資料不正確、不準確或不完整，否則該已提交的自我證明仍具十足效力。如情況有所改變，你務必通知積金易平台／受託人，並需要在發生改變後 30 天內向積金易平台／受託人提供一份已更新的自我證明。
- The eMPF Platform **MUST** obtain the complete and valid tax residency self-certification for the setting up of member account. To avoid any delay in the setting up of member account and contribution settlement (if any), please read and complete all the appropriate parts below. 積金易平台在開立成員帳戶前，必須取得完整及有效的稅務居民身分自我證明。為避免成員帳戶開立及供款處理（如有）有任何延誤，請細閱並完成以下所有適用部分。
- The eMPF Platform / The Trustee has right to require you to provide all relevant identification / verification documentation. Failure in providing the information and other personal data as requested may result in your application / instruction not being able to be processed. 積金易平台／受託人有權要求你提供所有相關的身分證明／驗證文件。如未能提供所需資料及其他個人資料，可能導致你的申請／指示不獲處理。
- Kindly note that the eMPF Platform / the Trustee is not allowed to offer any tax or legal advice to you. For tax-related questions, please consult your tax adviser or visit the OECD website (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) and IRD's AEOI website (www.ird.gov.hk/eng/tax/dta_aeoi.htm), or simply scan the QR code, for more CRS and related information. 請注意積金易平台／受託人不獲允許向你提供稅務或法律意見。任何稅務相關的疑問，請向專業稅務顧問或瀏覽 OECD（http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/）及稅務局（http://www.ird.gov.hk/chi/tax/dta_aeoi.htm）有關自動交換財務帳戶資料的網頁，或掃描此二維碼，以獲取更多 CRS 及相關資料。

OECD-CRS

IRD 稅務局

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

友邦機密及專利資料。嚴禁分發。

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

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

如只是香港稅務居民，不用填D(2)部分

- ☑ (ii) Hong Kong (and the TIN is my HKID Card No.) and also some other jurisdictions / countries
  香港 (及稅務編號為本人之香港身份證號碼) 及其他司法管轄區／國家
  (Please fill out the TIN [3] for all other jurisdictions / countries, other than HK, in the table of Part D(2). 請於 D(2) 部分列出所有香港以外其他司法管轄區／國家的稅務編號 [3]。)
- ☑ (iii) NOT Hong Kong, but instead some other jurisdictions / countries
  不是香港而是其他司法管轄區／國家
  (Please fill out Part D(2). 請填寫 D(2) 部分。)

如果客戶選擇了(ii)/(iii), 則需要填寫D(2)部分

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

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

	Jurisdiction / Country of Tax Residency 稅務居民所在司法管轄區／國家	TIN [3] 稅務編號 [3]	If no TIN available, please indicate Reason A, B or C [5] below 若未能提供稅務編號，請於下方填上理由 A、B 或 C [5]	Please explain why you are unable to obtain a TIN if you selected Reason B. 若你選擇理由 B，請在下方解釋無法取得稅務編號的原因。
a.	國家#1	稅務編號#1	A	
b.	國家#2	稅務編號#2	B	原因
c.	國家#3	稅務編號#3	C	

如果理由是B，則需要填寫原因。

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

OECD-TIN

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

[5] Reason A 理由 A - The jurisdiction / country where the account holder is a resident for tax purposes does not issue TINs to its residents.
帳戶持有人所屬的稅務居民司法管轄區／國家沒有向其居民發出稅務編號。

Reason B 理由 B - The account holder is unable to obtain a TIN. (Please explain why the account holder is unable to obtain a TIN in the above table if the account holder has selected this reason.)
帳戶持有人無法獲得稅務編號。(若帳戶持有人選擇這理由，請在上表解釋帳戶持有人無法獲得稅務編號的原因。)

Reason C 理由 C - No TIN is required. (Note: Only select this reason if the authorities of the relevant jurisdictions / countries of residence do not require the TIN to be disclosed.)
無需稅務編號。(註：只有在相關司法管轄區／國家的主管當局不需要披露該司法管轄區／國家發出的稅務編號方可選擇這理由。)

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

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

E. INVESTMENT MANDATE 投資授權

Please read the following before completing Part E. 於填寫 E 部分前，請閱讀以下事項：

1. You can choose to invest your contributions (including transfer-in monies) in any constituent funds. However, if you do not wish to make any investment choice, you do not have to do so. In the event of no investment choice or no valid investment mandate is provided, all contributions (including transfer-in monies) will be invested in accordance with the Default Investment Strategy ("DIS"). 你可選擇將你的供款（包括轉入之款項）投資於任何成分基金。但是，如你不想作出任何投資選擇，可無須這樣做。如沒有作出投資選擇或沒有提交有效的投資授權，所有供款（包括轉入之款項）將按照預設投資策略進行投資。
2. DIS is a default investment arrangement as stipulated in accordance with the Mandatory Provident Fund Schemes Ordinance. The DIS is invested in the Core Accumulation Fund and the Age 65 Plus Fund according to the pre-set allocation percentages at different ages and will adjust risk by way of reducing the holding in the Core Accumulation Fund and increasing the holding in the Age 65 Plus Fund after the Member reaches 50 years of age. For more details on derisking of the DIS, please refer to the MPF Scheme Brochure and the KSID of the Scheme. 預設投資策略是一項根據《強制性公積金計劃條例》規定的預設投資安排。預設投資策略透過於不同年齡按照預定配置百分比來投資於核心累積基金與 65 歲後基金及會隨着成員年滿 50 歲後以減持核心累積基金及增持 65 歲後基金來降低風險。有關預設投資策略降低風險機制的詳情，可參閱本計劃之強積金計劃說明書及主要計劃資料文件。
3. A valid investment mandate for the DIS or each selected fund for either the mandatory contributions or the voluntary contributions must be, including but not limited to: 強制性供款或自願性供款的預設投資策略或每項所選基金的有效投資授權必須為，包括但不限於：
   (i) each investment allocation percentage should be an integer and at least 5%, and 每項投資分配百分比須為整數及至少 5%，及
   (ii) the total investment allocation percentage should add up to 100%. 全部投資分配百分比的總和為 100%。
4. In the below events, contributions made and / or transfer-in monies from another MPF scheme(s) or Occupational Retirement Scheme(s) ("ORSO scheme(s)") for respective contribution type(s) will be: 就下列情況，你作出的供款及／或由其他強積金計劃或職業退休計劃轉入之款項的相關供款類別將會：
   (i) **wholly** invested in the DIS if: 全部根據預設投資策略進行投資，如：
      a. you do not make any investment choice; or 你不作任何投資選擇；或
      b. you do not give a valid, clear or complete investment mandate including but not limit
      效、清晰、完整的投資授權，包括但不限於更改位置旁沒有加號作實；或
      c. the investment allocation percentage of any selected funds is not an integer or at lea
      d. the total investment allocation percentage of the selected funds is over 100%; or 所選
      e. the instruction of any selected funds is unclear or illegible. 任何所選基金指示不清晰或
   (ii) **partially** (i.e. the remaining percentage) invested in the DIS if the total investment allo
   餘的百分比) 根據預設投資策略進行投資，如所選基金的投資分配百分比總和少於 100%
5. You should note that investment markets could fluctuate significantly. Fund unit prices may go down as well as up. Please carefully consider your own risk tolerance level and financial circumstances (as well as your own retirement plan) before making any investment choices. If in doubt, please contact your financial advisor for further details. 你必須注意投資市場可能出現顯著的波動，基金單位價格可跌可升。在作出投資選擇前，你必須小心衡量個人可承受風險的程度及財政狀況
6. The below invest
   列投資授權並不
7. Contributions, tra
   other ORSO sche
   註冊計劃轉入之款
   進行投資：

注意： 提醒客戶分配百分比必須為 5 的倍數 而總和必須為 100 。

注意： 以下2個類別都需要填寫 (如未有自願性供款都需要填寫)，各2個類別的分配百分比總和必須為100 。

DIS / Fund Code 預設投資策略／基金編號	Investment Strategy / Name of Constituent Fund 投資策略／成分基金名稱	Investment Allocation Percentage 投資分配百分比	
		Mandatory Contributions 強制性供款	Voluntary Contributions 自願性供款
Investment Strategy 投資策略			
DS	MPF Default Investment Strategy 強積金預設投資策略 Internal use 內部專用：DIS	%	%
Equity Funds – Index-Tracking Collective Investment Scheme Series ^ 股票基金 – 緊貼指數集體投資計劃系列 ^			
3G	American Fund 美洲基金	%	%
3E	Eurasia Fund 亞歐基金	50 %	50 %
3F	Hong Kong and China Fund 中港基金	%	%
83	World Fund 全球基金	50 %	50 %
Fixed Income Funds 固定入息基金			
3D	Asian Bond Fund 亞洲債券基金	%	%
83	Global Bond Fund 環球債券基金	%	%
R3	MPF Conservative Fund 強積金保守基金	%	%

Continued on the next page 續下頁

友邦機密及專利資料，嚴禁分發。

僅供內部培訓之用

E. INVESTMENT MANDATE 投資授權 (Continued 續)

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

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

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

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

F. "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE SCHEME 積金易平台及本計劃收集個人資料聲明（「聲明」）

Personal Information Collection Statement of The eMPF Platform 積金易平台收集個人資料聲明

向客戶講解積金易平台收集個人資料聲明

eMPF Platform Company Limited may need to collect, process and hold your pe
administration of your MPF account. Your personal data may also be used, transferred or disclosed to other parties for purposes as set out in our Personal Information Collection Statement (PICS). If you are already registered with the eMPF Platform, you have already agreed to be bound by our PICS, the latest version of which is set out below. If you are not yet registered, please refer to our PICS set out below. By providing your personal data in this form, you consent to eMPF Platform Company Limited collecting, using and holding your personal data in accordance with our Personal Information Collection Statement. 積金易平台有限公司可能需要收集、處理及持有你的個人資料，用作處理你的強積金計劃登記和你的強積金帳戶管理的用途。你的個人資料亦可能會根據我們的收集個人資料聲明中所列明的用途而被使用、轉移或披露給第三方。若你已註冊積金易平台，即表示你已同意我們的收集個人資料聲明，其最新版本載於下文。若你尚未註冊，請參閱我們以下的收集個人資料聲明。你透過此表格提供個人資料，即表示你同意積金易平台有限公司根據我們的收集個人資料聲明收集、處理及持有你的個人資料。

Personal Information Collection Statement 收集個人資料聲明

This Personal Information Collection Statement (this "**Statement**") is made in accordance with the requirements of the Personal Data (Privacy) Ordinance (Chapter 486 of the Laws of Hong Kong) (the "**PDPO**") and the guidelines issued by the Office of the Privacy Commissioner for Personal Data. This Statement notifies you of the personal data from time to time collected, processed and held by eMPF Platform Company Limited ("**we**", "**us**" or "**eMPF Company**"), the purposes for which your personal data will be used and to whom it may be disclosed, and your rights under the PDPO to access and correct your personal data. 本收集個人資料聲明（本「**聲明**」）是根據《個人資料（私隱）條例》（香港法例第 486 章）（「**《私隱條例》**」）的規定及個人資料私隱專員公署發出的指引而制定。本聲明旨在向你闡釋積金易平台有限公司（「**本公司**」、「**我們**」或「**積金易公司**」）不時收集、處理及持有你的個人資料、有關個人資料的用途和可能獲提供有關個人資料的對象，以及你可根據《私隱條例》查閱及更正有關個人資料的權利。

You may learn more about our policies on the collection, use, transfer, retention and protection of your personal data from our Privacy Policy, which is available at www.empf.org.hk/page/privacy-policy. 你可於本公司的《私隱政策》(www.empf.org.hk/page/privacy-policy) 了解更多關於我們收集、使用、移轉、保留及保護你的個人資料的政策。

1. Personal Data collected and maintained by eMPF Company 積金易公司收集及保存的個人資料

The "electronic MPF system" (as defined in the MPFSO) administered and operated by eMPF Company is designated by the Secretary for Financial Services and the Treasury under the Mandatory Provident Fund Schemes Ordinance (Chapter 485 of the Laws of Hong Kong) (the "**MPFSO**") to, inter alia, provide Mandatory Provident Fund ("**MPF**") scheme administration services to facilitate approved trustees of registered schemes in performing their scheme administration functions. eMPF Company provides such MPF scheme administration services through the "electronic MPF system" and other offline facilities including the service centres, administrative centres and call centres (collectively the "**eMPF Platform**"). Personal data which may from time to time be collected, processed and held by eMPF Company in respect of you includes: 根據《強制性公積金計劃條例》（香港法例第 485 章）（「**《強積金條例》**」），財經事務及庫務局局長指定以積金易公司管理和營運的「電子強積金系統」（定義見《強積金條例》）（其中包括）向強制性公積金（「**強積金**」）註冊計劃的核准受託人提供強積金計劃管理服務，以利便核准受託人執行他們的計劃管理職能。積金易公司通過「電子強積金系統」及其他實體設施，包括服務中心、行政中心以及電話支援服務中心（統稱「**積金易平台**」）提供有關強積金計劃管理服務。積金易公司可能不時收集、處理及持有與你有關的個人資料包括：

a. information which you provide during enrolment to an MPF scheme; 你就參與強積金計劃提供的資料；
b. information which you provide during registration for the eMPF Platform (including, if applicable, an image of your Hong Kong Identity Card and your selfies, which are collectively referred to as "identity verification data") and, regardless of any such registration, when you transact with the eMPF Platform; 你就登記使用積金易平台（包括你的香港身份證的影像及自拍照（統稱為「**身分驗證資料**」）（如適用）），以及你使用積金易平台（無論有否進行登記）進行交易時提供的資料；
c. information disclosed by or transferred from approved trustees of your MPF schemes; 由你的強積金計劃的核准受託人披露或移轉的資料；
d. details of transactions or other dealings in connection with your MPF schemes including, without limitation, information collected to handle your enquiries, complaints, applications, instructions and requests; 你的強積金計劃的交易詳情或其他事務往來，包括但不限於為處理你的查詢、投訴、申請、指示及要求而收集的資料；
e. (processed with your consent if required under the PDPO) information from other third parties and public sources, including but not limited to government authorities; and 來自包括但不限於政府機構的其他第三方或公共來源的資料（如《私隱條例》要求，將在獲得你同意的情況下進行處理）；及
f. information obtained or generated in the course of our performance of scheme administration services and other statutory functions under the MPFSO. 本公司根據《強積金條例》履行提供計劃管理服務及其他法定職能過程中取得或產生的資料。

Please note that personal data and other information requested (except those marked as "optional") must be provided before we can provide you with the relevant service(s) under the eMPF Platform. If you fail to provide such personal data and other information, or if they are inaccurate or incomplete, we may not be able to process your transactions and / or requests, or otherwise provide you with the relevant service. 請注意，本公司只有在取得所有我們要求有關你的個人資料及其他資料（除非標記為「可選填」外）後，方能為你提供積金易平台的相關服務。如你未能提供上述個人資料及其他資料，或該等資料屬不準確或不完整，本公司可能無法處理你的交易及 / 或要求，或為你提供相關服務。

2. Purposes of Collection of Personal Data 收集個人資料的用途

We may collect, process and hold your personal data for the following purposes: 本公司可收集、處理及持有你的個人資料作下列用途：

a. in relation to your identity verification data, to authenticate your identity through eKYC (but not the "iAM Smart" platform and/or the biometric authentication function built in your device) under the eMPF mobile application for accessing the eMPF Platform; 就你的身份驗證資料而言，通過積金易流動應用程式（「**應用程式**」）中的電子身份驗證程序（eKYC）（不涉及「智方便」（iAM Smart）平台及 / 或你裝置內建的生物辨識功能），驗證你的身份以進入積金易平台；
b. to facilitate your access to, and the management of your MPF account; 協助你查閱及管理強積金帳戶；
c. to process, administer and implement your applications, requests or instructions, and to provide you with such services as may from time to time be agreed with the approved trustees of your MPF schemes, all in connection with your MPF schemes; 處理、管理及執行你就強積金計劃所提出的申請、要求或指示，以及根據本公司不時與你的強積金計劃的核准受託人達成的協定，提供有關的服務；
d. for data matching with personal data and other information about you or your employer(s) for scheme administration and other related purposes; 就計劃管理及其他相關用途，與你或你的僱主的個人及其他資料進行比對；

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

e. for our internal business and administrative purposes, including but not limited to maintaining the security of the eMPF Platform, improvement of user experience, development of the eMPF Platform, administration of our risk management policies and procedures and for the purpose of compiling statistics and undertaking data analysis and other research; 用作本公司內部業務及行政管理的用途，包括但不限於維持積金易平台的安全，改善用戶體驗，發展積金易平台，執行風險管理政策和程序，以及用作數據統計、資料分析及其他研究用途；
f. to communicate with you, and to provide you with customer services; 與你溝通並為你提供客戶服務；
g. for complying with applicable laws and regulations, and any request or direction of, or responding to requests from, regulators, law enforcement agents or other government authorities; 遵從適用的法律和法規，以及監管機構、執法機關或其他政府部門的任何要求或指示，或回應其要求；
h. for protecting or exercising our rights, including but not limited to dealing with your complaints or inquiries, and taking any legal actions; 保障或行使本公司的權利，包括但不限於處理你的投訴或查詢，以及採取任何法律行動；
i. for handling any legal, regulatory or administrative proceedings, investigations or inquiries before any court or competent authority; 處理任何法庭或主管機關的法律、監管或行政管理程序、調查或查詢；
j. for detecting and preventing crime and other unlawful behaviour; 偵查及阻止犯罪及其他違法行為；
k. for any other purposes or functions from time to time specified or designated under the MPFSO; 《強積金條例》不時訂明或指定的任何其他用途或功能；
l. with your consent (including any indication of no objection), for conducting direct marketing in accordance with Section 4 below, whether for itself or on behalf of approved trustees of your MPF schemes; and 經你同意（包括表示不反對），根據下文第 4 條為本公司或代表你的強積金計劃的核准受託人進行直接促銷；及
m. other purposes directly relating to any of the above. 其他與任何上述內容有直接關係的用途。

3. Classes of Transferees 承轉人類別

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

a. your employers and approved trustees of your MPF schemes; 你的僱主及強積金計劃的核准受託人；
b. our agent, adviser, service provider and contractor who provides administrative, telecommunications, computer, payment, fraud prevention, insurance, data processing, information technology, legal, accounting, operational and/or other services or support to us in connection with the operations of the eMPF Platform; 任何就積金易平台的營運而向本公司提供管理、電訊、電腦、付款、反欺詐、保險、資料處理、資訊科技、法律、會計、營運及／或其他服務或支援的代理人、顧問、服務供應商或承辦商；
c. the Mandatory Provident Fund Schemes Authority ("MPFA"), other government authorities and agencies, courts, regulatory or administrative bodies, law enforcement agencies and other bodies or persons to whom we are under an obligation to make disclosure under any legal, regulatory or administrative requirements applicable to us; and 強制性公積金計劃管理局（「積金局」）、其他政府部門及機構、法庭、監管機構或行政管理機構、執法機構及其他機構或人士，如本公司須按照任何適用法律、法規或行政命令向其作出披露；及
d. any other person as agreed with you from time to time. 你不時同意的任何其他人士。

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

4. Direct Marketing 直接促銷

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

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

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

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

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

5. Access and Correction 查閱及更正

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

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

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

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

We may require you to provide identity proof for handling your data access or correction request, and we may charge a fee for complying with your data access request. 處理個人資料查閱或更正的要求時，本公司或會要求你提供身份證明文件，並可就你的資料查閱的要求收取費用。

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6. Miscellaneous 其他事宜

We may update this Statement from time to time, and the most recent version can be found at www.empf.org.hk/pics . We will notify you of any update to this Statement and, where required by the PDPO, obtain your consent. 本公司會不時更新本聲明，最新版本可參閱 www.empf.org.hk/pics，我們會通知你有關本聲明的更新，並在《私隱條例》有要求的情況下取得你的同意。

If there is any inconsistency or ambiguity between the English and Chinese versions of this Statement, the English version will prevail. 如本聲明的中英文版本有任何不一致或歧義，概以英文版本為準。

☐ Please tick the box if you do not agree to provide your consent for your personal data to be used for direct marketing purposes in accordance with the "Direct Marketing" section of the Personal Information Collection Statement of eMPF Platform Company Limited. Your indication herein will replace any indication of choice you may have previously provided to eMPF Platform Company Limited in relation to "Direct Marketing". 若你不同意積金易平台有限公司根據其收集個人資料聲明內的「直接促銷」部分，使用你的個人資料以作直接促銷之用途，請在方格內填上剔號。你在此作出之指示，將取代你先前可能已向積金易平台有限公司提供任何有關選擇「直接促銷」的指示。

Personal Information Collection Statement of AIA MPF – Prime Value Choice 友邦強積金優選計劃收集個人資料聲明

AIA Company (Trustee) Limited (the "**Company**", "**we**", "**us**" or "**our**") is a wholly owned subsidiary of AIA Group Limited. AIA Group Limited, together with its subsidiaries and affiliates are collectively referred to in this Statement as the "**AIA Group**" and individually referred to as an "**AIA Entity**".
友邦(信託)有限公司(「**本公司**」、「**我們**」)乃友邦保險控股有限公司的全資附屬公司。在本聲明內,友邦保險控股有限公司連同其附屬公司及聯營公司將統稱為「**友邦集團**」並單獨稱為「**友邦機構**」。

向客戶講解收集AIA 計劃個人資料聲明

From time to time, it is necessary for you, as (prospective) participating employers ("**Participating Employers**") and/or members ("**Members**") (collectively referred to as "**you**" or "**your**"), to provide the Company with certain personal data relating to you in connection with the application for and provision of pension schemes as well as the carrying out by the Company of other services relating to the pension schemes. Failure to supply such data may result in the Company being unable to process your application for pension schemes or to provide or continue to provide the pension schemes and/or relevant services to you. During the course of your relationship with the Company, further personal data relating to you, may also be collected in the ordinary course of our business. If you provide personal data to the Company about another individual, you confirm that you are either (i) the parent or legal guardian of the individual, or (ii) you have obtained the individual's consent to provide his or her personal data to the Company, and for such personal data to be used, processed, disclosed and transferred in accordance with this Statement.
在閣下申請及由本公司提供退休金計劃,及當本公司提供與該等退休金計劃及服務相關之其他服務時,作為(準)參與僱主(「**參與僱主**」)及/或成員(「**成員**」)(統稱「**閣下**」),閣下必須不時向我們提供若干關於閣下的個人資料,若閣下未能提供該等資料,可能會令本公司無法處理閣下的退休金計劃申請或向閣下提供或繼續提供退休金計劃及/或相關服務。在閣下與本公司的日常業務過程中,本公司亦可能會在日常業務運作的過程中收集關於閣下的其他個人資料。若閣下向本公司提供關於其他人士的個人資料,閣下確認閣下是(i)該名人士的父母或法定監護人,或(ii)閣下已獲得該名人士的同意,向本公司提供該人士的個人資料,並同意該等個人資料可根據本聲明被使用、處理、披露及轉移。

(1) PURPOSES FOR COLLECTING PERSONAL DATA
個人資料收集目的

Personal data relating to you held or collected by the Company (including but not limited to credit information and claims history) may be used by the Company for the following purposes ("**Purposes**"):
本公司所持有或收集的有關閣下的個人資料(包括但不限於信用資料及以往申索紀錄)可能會被本公司用作下列用途(「**訂明用途**」):

(i) processing, accepting and/or rejecting applications for Pension Schemes (as defined below);
處理、接受及/或拒絕該等退休金計劃(如下文定義)的申請;

(ii) the administration and/or management of or in connection with the contributions or benefits or accounts in respect of the Participating Employers and/or Members under the pension schemes (the "**Pension Schemes**") administered by AIA Entities;
由友邦機構執行的退休金計劃(「**該等退休金計劃**」)下參與僱主及/或成員的供款、權益或帳戶的執行及/或管理,或與其供款、權益或帳戶相關的執行及/或管理;

(iii) providing Pension Schemes and related services to you, and processing requests made by you, from time to time in relation to the Pension Schemes and related services, including but not limited to making contributions, transfer of benefits, switching of pension funds and withdrawal of benefits;
為閣下提供該等退休金計劃及相關服務,並處理閣下不時就該等退休金計劃及相關服務提出的要求,包括但不限於作出供款、轉移權益、退休基金轉換及提取權益;

(iv) subject to your consent, conducting direct marketing activities of pension products and related services offered by AIA Entities as described in paragraph (3) below;
如已取得閣下同意,進行下文第(3)段所述友邦機構提供的退休金產品及相關服務的直接促銷活動;

(v) performing functions and activities incidental to the provision of Pension Schemes and related services, including, without limitation, reporting, maintenance of online and other services, identity verification, data analysis, research and statistical analysis;
執行與所提供的該等退休金計劃及相關服務相關的功能及活動,包括但不限於報告、維持網上及其他服務、核實身份、資料分析、研究及統計分析;

(vi) improving and furthering the provision of Pension Schemes and related services (including through customer research or surveys) offered by AIA Entities, subject to applicable legislation;
在適用法例規限下,提升及進一步提供由友邦機構提供的該等退休金計劃及相關服務(包括透過客戶研究或調查);

(vii) complying with the obligations, requirements and/or arrangements for disclosing and using data that bind on or apply to the Company and/or the AIA Group or that the Company and/or the AIA Group is expected to comply with according to:
履行根據下列各項對本公司及/或友邦集團具有約束力或適用或期望本公司及/或友邦集團遵守的就披露及使用資料的義務、要求及/或安排:

(a) any law binding on or applying to it within or outside the Hong Kong Special Administrative Region ("**Hong Kong**") existing currently and in the future (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information);
不論於香港特別行政區(「**香港**」)境內或境外及不論目前或將來存在的對其具法律約束力或適用的任何法律(例如稅務條例及當中的條款,包括與自動交換財務帳戶資料相關的條款);

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(b) any guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of insurance or financial services providers within or outside Hong Kong existing currently and in the future (e.g. guidelines or guidance given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information); or
不論於香港境內或境外及不論目前或將來存在的任何法律、監管、政府、稅務、執法或其他機關，或保險或金融服務供應商的自律監管機構或行業組織或協會所作出或發出的任何指引（例如稅務局作出或發出的指引，包括與自動交換財務帳戶資料相關的指引）；或

(c) any present or future contractual or other commitment with local, national or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of insurance or financial services providers that is assumed by or imposed on the Company or the AIA Group by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations;
本公司或友邦集團因其位於或跟相關本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或保險或金融服務供應商的自律監管機構或行業組織或協會的司法管轄區有關的金融、商業、業務或其他利益或活動，而向該等本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或有關的自律監管機構或行業組織或協會承擔或被該等施加的任何目前或將來的合約或其他承諾；

(viii) complying with any obligations, requirements, policies, procedures, measures or arrangements for sharing data and information within the AIA Group and/or any other use of data and information in accordance with any group-wide programs for compliance with sanctions or prevention or detection of money laundering, terrorist financing or other unlawful activities;
遵守友邦集團為符合制裁或預防或偵測洗黑錢、恐怖分子融資活動或其他非法活動的任何方案就於友邦集團內共用資料及數據及／或資料及數據的任何其他使用而指定的任何義務、要求、政策、程序、措施或安排；

(ix) enabling an actual or proposed assignee, transferee, participant or sub-participant of the Company's rights or business (or portions thereof) to evaluate or carry out the transaction intended to be the subject of the assignment, transfer, participation or sub-participation; and
允許本公司的權利或業務的實際或建議承讓人、受讓人、參與人或附屬參與人，就擬涉及的轉讓、出讓、參與或附屬參與的交易（或其部分）進行評估或執行有關交易；及

(x) any other purposes relating to the purposes listed above.
與上述用途有關的其他用途。

(2) TRANSFER OF PERSONAL DATA
個人資料的轉移

Personal data held by the Company relating to you will be kept confidential but the Company may provide such data to the following parties, whether inside or outside of Hong Kong, to fulfil the Purposes set out above in paragraph (1) of this Statement:
本公司所持有關於閣下的個人資料將會保密，但本公司可能會向以下各方，不論於香港境內或境外，提供該等資料以符合本聲明以上第 (1) 段所列出的訂明用途：

(i) any agent, contractor or third party service provider who provides services to the Company in connection with the operation of its pension business including administrative, telecommunications, computer, payment, data processing, storage, customer research or survey or other services in connection with the operation of the Pension Schemes;
就退休金業務運作向本公司提供服務的任何代理人、承包人或第三方服務供應者，包括行政、電訊、電腦、付款、資料處理、儲存、客戶研究或調查或其他與該等退休金計劃運作相關的服務；

(ii) relevant Participating Employers (if applicable);
相關參與僱主（如適用）；

(iii) any person or entity to whom the Company or the AIA Group is under an obligation or otherwise required to make disclosure under the requirements of any law or rules, regulations, codes of practice, guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations binding on or applying to the Company or the AIA Group or with which the Company or the AIA Group is expected to comply, or to establish, exercise or defend or to protect legal claims, to protect the rights, property or safety of the Company or the AIA Group, or any disclosure pursuant to any contractual or other commitment of the Company or the AIA Group with local, national or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations, all of which may be within or outside Hong Kong and may be existing currently and in the future;
本公司或友邦集團根據法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織或協會所作出或發出對本公司或友邦集團具有約束力或適用或期望其遵守的法律或規則，指例，實務守則，指引或為建立，行使或捍衛或保護法律索償，保護本公司或友邦集團的權利，財產或安全，或根據本公司或友邦集團向本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織或協會的任何合約或其他承諾（以上不論於香港境內或境外及不論目前或將來存在的），而有義務或以其他方式被要求向其作出披露的任何人士或機構；

(iv) AIA Entities;
友邦機構；

(v) any actual or proposed assignee, transferee, participant or sub-participant of the Company's rights or business;
and
本公司的權益或業務的任何實際或建議承讓人、受讓人、參與人或附屬參與人；及

(vi) any persons who/which you have given instructions, authorization and consent to the Company in order to communicate with and provide information to them.
任何閣下已發出指示、授權及同意本公司向其溝通及提供資料的人士。

From time to time, AIA Group or the Company may purchase a business or sell one or more of the Company's business(es) (or portions thereof). In the event that AIA Group or the Company purchase(s) a business, the personal data received with that business would be treated in accordance with this Statement, if it is practicable and permissible to do so. In the event that AIA Group or the Company sell(s) a business, provisions will be included in the selling contract requiring the purchaser to treat your personal data in the same manner required by this Statement.
友邦集團或本公司可能不時收購業務或出售一項或多項本公司業務（或其部分）。如友邦集團或本公司收購業務，若情況可行及允許，該業務下接收的個人資料將會根據本聲明處理。如友邦集團或本公司出售業務，銷售合約中將包含要求買方按本聲明所要求的的方式處理閣下的個人資料之條款。

友邦機密及專利資料。嚴禁分發。

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(3) USE AND PROVISION OF PERSONAL DATA IN DIRECT MARKETING
在直接促銷中使用及提供個人資料

Subject to your consent, the Company may use your personal data we collected for direct marketing of Pension Schemes and related services as described below:
如本公司已取得閣下同意，本公司可以把我們收集的閣下之個人資料用於該等退休金計劃及相關服務的直接促銷如下所述：

(i) your name, your contact details, products and services portfolio information, transaction pattern and behaviour, financial background and demographic data of you collected by the Company from time to time may be used by the Company in direct marketing; and
本公司可以把本公司不時收集的閣下之姓名、閣下之聯絡資料、產品及服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷；及

(ii) the pension products and related services offered by AIA Entities may be marketed.
可以就友邦機構提供的退休金產品及相關服務進行促銷。

If you do not wish the Company to use your personal data we collected for direct marketing of pension products and related services, you may exercise your opt-out right by notifying the Company. To exercise your opt-out right, you may write to the Data Protection Officer of the Company at the address and email address provided in paragraph (4) of this Statement, or provide the Company with your opt-out choice in the relevant application form (if applicable).
如閣下不希望本公司使用本公司收集的閣下之個人資料作退休金產品及相關服務的直接促銷，閣下可通知本公司以行使閣下的拒絕促銷選擇權。如欲行使拒絕促銷選擇權，閣下可根據本聲明第 (4) 段所提供的地址及電郵以書面向本公司的資料保障主任提出有關要求，或於有關的申請表格內向本公司表達閣下拒絕促銷的意願（如適用）。

(4) DATA ACCESS AND CORRECTION RIGHT
查閱及改正資料權利

In accordance with the Personal Data (Privacy) Ordinance (the "**Ordinance**"), you have the right to request access to and the correction of any of your personal data held by the Company, by writing to the Data Protection Officer of the Company at the following address and email:
根據個人資料（私隱）條例（「**條例**」）規定，閣下有權要求查閱及更正任何本公司持有閣下的個人資料，請以書面經以下地址及電郵向本公司的資料保障主任提出：

The Data Protection Officer
AIA Company (Trustee) Limited
c/o AIA International Limited (as administrator)
12/F, AIA Tower, 183 Electric Road,
North Point,
Hong Kong
Email: AIAHK.Compliance@aia.com

資料保障主任
友邦（信託）有限公司
轉交友邦保險（國際）有限公司（作為管理人）
香港北角電氣道 183 號友邦廣場 12 樓
電郵：AIAHK.Compliance@aia.com

According to the Ordinance, the Company has the right to charge a reasonable fee for the processing of any data access request.
根據條例，本公司有權就處理任何查閱資料要求收取合理費用。

(5) You also have the right to request for the Company's policies and practices in relation to personal data and to be informed of your personal data that is held by the Company by writing to the Company's Data Protection Officer at the address and email provided in paragraph (4) of this Statement.
閣下亦有權根據本聲明第 (4) 段所提供的地址及電郵向本公司的資料保障主任索取本公司有關個人資料私隱的政策及實務運作資料，並獲告知本公司持有的閣下之個人資料。

(6) Nothing in this Statement shall limit your rights under the Ordinance.
本聲明不會限制閣下在條例下所享有的權利。

(7) The Company retains the right to change this Statement.
本公司保留修改本聲明的權利。

(8) A Privacy Addendum under the Personal Information Protection Law of the People's Republic of China supplements this Statement and is available at https://www.aia.com.hk/en/privacy-statement-main. The Privacy Addendum applies to you if you are within mainland China.
根據中華人民共和國《個人信息保護法》而訂立的私隱附錄就本聲明進行補充，並可在以下網址下載：
https://www.aia.com.hk/zh-hk/privacy-statement-main。若閣下正身處中國大陸，該私隱附錄將適用於閣下。

☐ Please tick the box if you do not agree to provide your consent for (i) eMPF Platform Company Limited to transfer your personal data to the Trustee of the MPF scheme in which you enrol; and (ii) such Trustee to transfer your personal data to the Sponsor of the MPF scheme in which you enrol for direct marketing purposes in accordance with (a) the Personal Information Collection Statement of eMPF Platform Company Limited; and (b) the Personal Information Collection Statement of such Trustee. 若你不同意 (a) 積金易平台有限公司根據其收集個人資料聲明及 (b) 你所登記的強積金計劃受託人根據其收集個人資料聲明部分 (i) 轉移你的個人資料予你所登記的強積金計劃的受託人，及 (ii) 該受託人轉移你的個人資料予你所登記的強積金計劃的保薦人，作直接促銷之用途，請在方格內填上剔號。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

G. AUTHORIZATION AND DECLARATION 授權及聲明

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

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

Signature of Member ^ 成員簽署 ^	**Date 日期**
Peter Chan	31 / 10 / 2025 DD 日 / MM 月 / YYYY 年

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

+ Warning 警告 :

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

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

MISCELLANEOUS 其他

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

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

OR visit aia.com.hk

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

OR visit aia.com.hk

CHECKLIST OF APPLICATION DOCUMENTS 申請文件清單

MPF account setup may be affected if you do not submit all required document(s) and information. The Trustee reserves the right to request additional information and documents for the purpose of complying with regulatory requirements. 如你未能提供全部所需文件及資料，可能會影響開立此強積金帳戶。受託人保留索取更多資料及文件的權利，以作遵守監管規定之目的。

1. Copy of HKID Card / Passport 香港身份證／護照副本 (For Hong Kong non-permanent resident, please enclose a copy of Passport. 如非香港永久性居民，請附上護照副本。)
2. Copy of the Business Registration Certificate 商業登記證副本 (If applicable 如適用)
3. Supporting document(s) for the proof of source of fund 資金來源證明文件 (If applicable 如適用)

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

Submission Channels 遞交途徑	Enquiries 查詢
1. Post: PO Box 98929 Tsim Sha Tsui Post Office 郵寄：尖沙咀郵政局郵政信箱 98929 號	1. eMPF Customer Service Hotline 積金易客戶服務熱線：183 2622
2. Drop-in Box in any one of the eMPF Service Centres below 下列任何一間積金易服務中心的投遞箱	2. Email address 電郵地址：enquiry@support.empf.org.hk
3. Email address 電郵地址：forms@support.empf.org.hk	3. Fax 傳真：3197 2922
4. Fax 傳真：3197 2988	
Please do **NOT** submit duplicate copies to avoid duplication. 請勿遞交相同表格，以免重複。	

eMPF Service Centres Address & Service Hours 積金易服務中心地址及服務時間

Hong Kong Island 香港島	Kowloon 九龍	New Territories 新界
Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong 香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室	Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon 九龍尖沙咀東部麼地道 77 號華懋廣場 12 樓 1205-6 室	Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories 新界荃灣楊屋道 8 號如心廣場第 2 座 18 樓 1802A 室

Service Hours 服務時間：

Monday to Friday	星期一至五	9:00 am – 6:00 pm	上午 9 時至下午 6 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時至下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

eMPF Customer Service Hotline Service Hours 積金易客戶服務熱線服務時間

Monday to Friday	星期一至五	9:00 am – 7:00 pm	上午 9 時至下午 7 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時至下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

MPF INTERMEDIARY DETAILS 強積金中介人資料 (For MPF Intermediary Use Only 只供強積金中介人填寫)

Intermediary Name 1 中介人名稱 1: Wong Man Kit	Intermediary Name 2 中介人名稱 2:
MPF Registration No. 強積金註冊編號: 123456	MPF Registration No. 強積金註冊編號:
Agent / Broker Code. 經紀／代理人編號: A0001	Agent / Broker Code. 經紀／代理人編號:

!!!重要提示!!!

如使用此積金易表格，需額外提交友邦強積金客戶聲明及同意書至AIA
此申請表格及簽名核實證明文件（SV）則提交至積金易平台

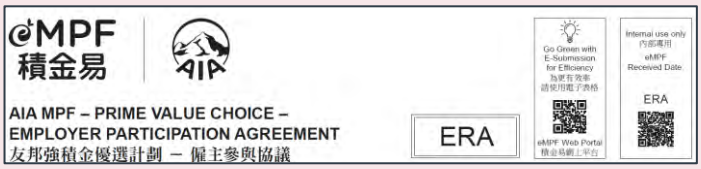
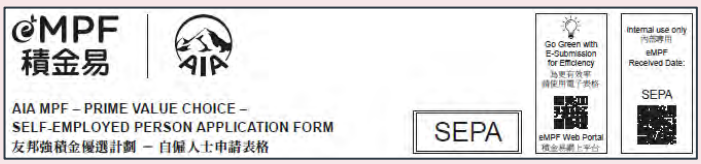
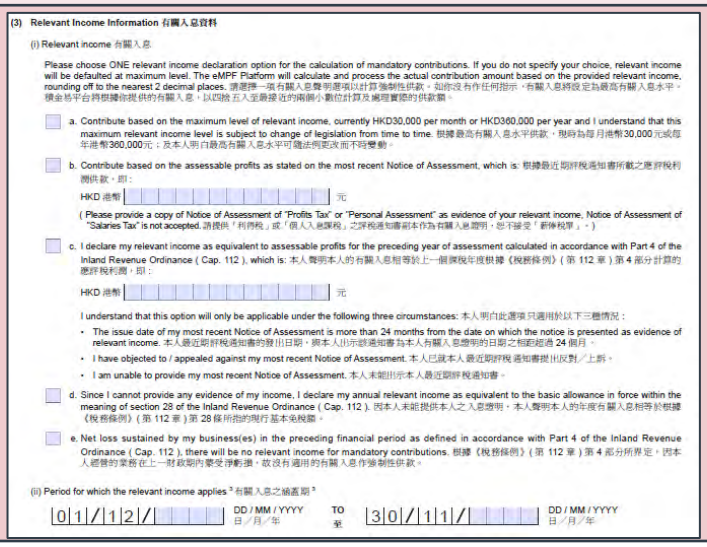
友邦機密及專利資料。嚴禁分發。

填寫自僱人士申請表格之常見錯誤

文件類型	常見錯誤
自僱人士申請表格	• 欠缺香港身份證/護照副本 • 主要營業地點與商業登記證副本不符 • 欠缺/欠清晰商業登記證副本 • 欠缺/欠清晰業務性質 • 欠缺/欠清晰的參加日期/供款的日期 • 欠缺直接付款授權表(如供款方法選擇直接扣帳) • 欠缺/不正確/未完成的共同匯報標準資料 • 重複現有計劃 • 欠缺中介人資料

友邦機密及專利資料。嚴禁分發。

填寫自僱人士申請表格之常見錯誤與建議

注意事項	參考填寫範例
常見錯誤： • 漏報填寫業務性質	 (4) Nature of Business 業務性質 (i) Catering 餐飲業 (ii) Cleaning 清潔業 (iii) Community / Social / Personal Services 社區／社會／個人服務業 (iv) Construction 建造業 (v) Finance / Insurance / Real Estate / Business Services 金融／保險／地產／商用服務 (vi) Hairdressing and Beauty 理髮及美容業 (vii) Manufacturing 製造業 (viii) Security Guard Services 保安服務業 (ix) Transportation 運輸業 (x) Wholesale / Retail / Import and Export Trades 批發／零售／出入口貿易 (xi) Others, please specify 其他，請註明：
正確填寫： • 申請人須餐飲、清潔、建造、金融等… 於清單中選擇其中一項，如非以上業務性質請選擇其他及註明	
常見錯誤： • 自僱人士填寫錯誤表格，例如持有商業登記證之有限公司擁有人填寫了自僱人士申請表格	 eMPF 積金易 AIA MPF – PRIME VALUE CHOICE – EMPLOYER PARTICIPATION AGREEMENT 友邦強積金優選計劃 – 僱主參與協議 ERA Go Green with E-Submission for Efficiency eMPF Web Portal Internal use only eMPF Received Date: ERA  eMPF 積金易 AIA MPF – PRIME VALUE CHOICE – SELF-EMPLOYED PERSON APPLICATION FORM 友邦強積金優選計劃 – 自僱人士申請表格 SEPA Go Green with E-Submission for Efficiency eMPF Web Portal Internal use only eMPF Received Date: SEPA
正確填寫： • 自僱人士應根據情況選擇並填寫正確表格	自僱人士應根據情況選擇並填寫正確表格： • 未持有商業登記證 → 填寫自僱人士申請表格 • 持有商業登記證之無限公司擁有人→填寫自僱人士申請表格 • 持有商業登記證之有限公司擁有人→填寫僱主申請表格
常見錯誤： • 漏報填寫入息資料	 (3) Relevant Income Information 有關入息資料 (i) Relevant income 有關入息 Please choose ONE relevant income declaration option for the calculation of mandatory contributions. If you do not specify your choice, relevant income will be defaulted at maximum level. The eMPF Platform will calculate and process the actual contribution amount based on the provided relevant income, rounding off to the nearest 2 decimal places. 請選擇一項有關入息聲明選項以計算強制性供款，如你沒有作任何指示，有關入息將設定為最高有關入息水平。積金易平台將根據你提供的有關入息，以四捨五入至最接近的兩個小數位計算及處理實際的供款額。 a. Contribute based on the maximum level of relevant income, currently HKD30,000 per month or HKD360,000 per year and I understand that this maximum relevant income level is subject to change of legislation from time to time. 根據最高有關入息水平供款，現時為每月港幣30,000元或每年港幣360,000元；及本人明白最高有關入息水平可隨法例更改而不時變動。 b. Contribute based on the assessable profits as stated on the most recent Notice of Assessment, which is: 根據最近期評稅通知書所載之應評稅利潤供款，即： HKD 港幣 元 (Please provide a copy of Notice of Assessment of "Profits Tax" or "Personal Assessment" as evidence of your relevant income. Notice of Assessment of "Salaries Tax" is not accepted. 請提供「利得稅」或「個人入息課稅」之評稅通知書副本作為有關入息證明，恕不接受「薪俸稅單」。) c. I declare my relevant income as equivalent to assessable profits for the preceding year of assessment calculated in accordance with Part 4 of the Inland Revenue Ordinance (Cap. 112), which is: 本人聲明本人的有關入息相等於上一個課稅年度根據《稅務條例》(第 112 章) 第 4 部分計算的應評稅利潤，即： HKD 港幣 元 I understand that this option will only be applicable under the following three circumstances: 本人明白此選項只適用於以下三種情況： • The issue date of my most recent Notice of Assessment is more than 24 months from the date on which the notice is presented as evidence of relevant income. 本人最近期評稅通知書的發出日期，與本人出示該通知書為本人有關入息證明的日期之相距超過 24 個月。 • I have objected to / appealed against my most recent Notice of Assessment. 本人已就本人最近期評稅通知書提出反對／上訴。 • I am unable to provide my most recent Notice of Assessment. 本人未能出示本人最近期評稅通知書。 d. Since I cannot provide any evidence of my income, I declare my annual relevant income as equivalent to the basic allowance in force within the meaning of section 28 of the Inland Revenue Ordinance (Cap. 112). 因本人未能提供本人之入息證明，本人聲明本人的年度有關入息相等於根據《稅務條例》(第 112 章) 第 28 條所指的現行基本免稅額。 e. Net loss sustained by my business(es) in the preceding financial period as defined in accordance with Part 4 of the Inland Revenue Ordinance (Cap. 112), there will be no relevant income for mandatory contributions. 根據《稅務條例》(第 112 章) 第 4 部分所界定，因本人經營的業務在上一財政期內蒙受淨虧損，故沒有適用的有關入息作強制性供款。 (ii) Period for which the relevant income applies 有關入息之涵蓋期 01/12/ DD / MM / YYYY 日／月／年 TO 至 30/11/ DD / MM / YYYY 日／月／年
正確填寫： • 申請人需要填入息資料，包括按最高有關入息水平、按本人最近評稅通知書所載應評稅利潤及按稅務條例所載基本免稅額	

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

友邦強積金優選計劃
可扣稅自願性供款帳戶成員申請表格(TVCA)
範例

友邦機密及專利資料。嚴禁分發。

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eMPF 積金易 | AIA

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

eMPF Web Portal
積金易網上平台

Internal use only
內部專用
eMPF Received Date:

TVCA

AIA MPF – PRIME VALUE CHOICE – TAX DEDUCTIBLE VOLUNTARY CONTRIBUTIONS ("TVC") ACCOUNT MEMBER APPLICATION FORM
友邦強積金優選計劃 – 可扣稅自願性供款帳戶成員申請表

TVCA

Important Notes 重要事項 :

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

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

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

A. MEMBER PARTICULARS 成員資料

(1) Scheme Details 計劃資料

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

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

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

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

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

Surname in English 英文姓氏 **CHAN**

Given Name in English 英文名字 **TAI MAN** ("the Member")

Name in Chinese 中文姓名 (Surname 姓氏) **陳** (Given Name 名字) **大文** (「成員」)

友邦機密及專利資料。嚴禁分發。

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(4) Date of Birth [1] 出生日期 [1] 28/08/1988 DD/MM/YYYY 日/月/年 (5) Gender 性別 ☑ Male 男 ☐ Female 女

[1] If the Member's HKID Card only contains the year of birth and the Member has no other form of identification to prove the exact date of birth (e.g. Birth Certificate or Passport), the eMPF Platform shall adopt 31 December as the Member's birthday. Likewise, if the Member's HKID Card contains only year and month but not the day of birth, the eMPF Platform shall adopt the last day of the month as the birthday. If the Member leaves the month and / or day blank, the eMPF Platform shall follow the above rules to adopt the date of birth as the last day of that month or 31 December. 如成員的香港身份證上只有出生年份，而成員沒有其他證件證明實際出生日期（例如出生證明書或護照），積金易平台將以該年之 12 月 31 日作為成員的出生日期。同樣，如成員的香港身份證上只有出生年份及月份而沒有註明出生日子，積金易平台將以有關月份的最後一天作為成員的出生日期。總而言，若成員沒有填寫月份及／或日子，成員的出生日期亦將根據以上規定，即定為該月的最後一天或 12 月 31 日。

記得附上香港身份證 / 護照副本

(6) Identification 身分證明

☑ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for

小提示：如客戶同時擁有香港地區以外的稅務居民身份，需填寫E(2)稅務資料

Document No. 證件號碼 Y1234567

如: 中國香港 / 中國內地 / 美國 / 澳洲

(7) Nationality 國籍 (8) Place of Birth 出生地點 (Not compulsory 可不填寫) 香港

(9) Mobile Phone No. 手提電話號碼
(To provide member up-to-date MPF account information, this field is mandatory. 為提供最新強積金帳戶資料予成員，此欄位必須填寫。)
(Country / Area Code * 國家／地區編號 *) 852 62342345

(10) Secondary Telephone No. 第二聯絡電話號碼
(Country / Area Code * 國家／地區編號 *)

* SMS (if applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊（如適用）只發送至香港手提電話號碼。如未有提供國家／地區編號，將預設為「香港 (852)」。

(11) Email Address 電郵地址

chantaiman123@gmail.com

(12) Job Title / Occupation 職銜／職業

(13) Residential Address 居住地址 (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室: C
Floor 層數: 30
Block 座: 2
Building / Estate 大廈／屋苑: 開心大廈
Street (Street No. and Street Name) 街道 (街號及街道名稱): 開心路10號
District Area 區域: 上環

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *
Country * / Region * 國家 * ／地區 *
Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

(14) Correspondence Address 通訊地址

(If different from the above Residential Address, please provide either English OR Chinese address 如與上述居住地址不同，請提供英文或中文地址)

Flat / Room 單位／室
Floor 層數
Block 座
Building / Estate 大廈／屋苑
Street (Street No. and Street Name) 街道 (街號及街道名稱)
District Area 區域

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *
Country * / Region * 國家 * ／地區 *
Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

友邦機密及專利資料。嚴禁分發。

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B. CONTRIBUTION DETAILS 供款詳情

選擇其中一個合適選項：定期 / 整筆供款

Please ch... ...opriate option(s) and provide the relevant information (if applicable). 請揀選適當選項及提供相關資料 (如適用) :

(1) ☐ Regular Contribution 定期供款

選擇其中一個供款選項：按月 / 按年

Contribution Frequency 供款週期	☑ a. Monthly Basis 按月	☑ b. Annually Basis 按年
Regular Contribution Start Date [2] 定期供款開始日期 [2]	01/12/2025 DD / MM / YYYY 日／月／年	
Regular Contribution Amount [3] 定期供款金額 [3]	月供最少$300 HKD 港幣 2000 元 • The minimum monthly contribution amount is HKD300. 按月供款的最低供款金額為港幣300元。	年供最少$3600 HKD 港幣 20000 元 • The minimum annually contribution amount is HKD3,600. 按年供款的最低供款金額為港幣3,600元。

(2) ☐ Lump Sum Contribution Amount [3] 整筆供款金額 [3]

整筆供款最少$1000

HKD 港幣 10000 元

• The minimum lump sum contribution amount is HKD1,000. 整筆供款的最低供款金額為港幣1,000元。

[2] Contribution will commence on Regular Contribution Start Date or direct debit effective date (if the first contribution is made by direct debit), whichever is later. For details, please refer to Part D below. 供款將於定期供款開始日或直接扣賬生效日開始 (如首次供款以直接扣賬繳付) ，以較後者為準。詳情請參閱下列 D 部分。

[3] Please indicate a payment method in Part D below. For first lump sum contribution, please make payment by "Cheque" or "Electronic Means", as the setup of direct debit takes time. 請於下列 D 部分填寫付款方法。就首次整筆供款，由於設立直接扣賬需時，請以「支票」或「電子途徑」繳付。

C. SOURCE OF FUND 資金來源

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

選擇以下其中一個合適選項及提供資金來源證明文件 (如需要)

☑ (1) Salary 薪金
- Monthly salary 月薪: HK$ XXXXXX

☐ (2) Personal savings 個人儲蓄
- Name of bank 銀行名稱
- Total amount 總金額

☐ (3) Investment holdings 持有投資
- Description of investment 投資說明
- Value of investment 投資價值

☐ (4) Inheritance 遺產
- Details of the inheritance 遺產詳情
- Date received the inheritance 繼承遺產日期
- Inheritance amount 遺產金額

☐ (5) Sale of property 出售物業
- Address of property 物業地址
- Sales proceeds 出售收益
- Date of sale 出售日期

☐ (6) Maturing investments or insurance policy 投資或保單到期
- Description of investment 投資說明
- Proceeds received from the investments or policy 從投資或保單所得的款項
- Date of maturity 到期日

☐ (7) Others 其他
- Nature of the income / wealth 收入／財富的性質
- Received amount 所收金額
- Date of receipt 收款日期

友邦機密及專利資料。嚴禁分發。

付款方法：✓其中一個合適選項：直接扣帳 / 支票 / 電子途徑

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D. PAYMENT METHOD AND DETAILS 付款方法及詳情

Please choose appropriate option(s) and provide payment information (if applicable). If no option is chosen, payment method will be defaulted as by "Cheque" without prior notice. 請揀選適當選項及提供付款資料（如適用）。如沒有就付款方法作出選擇，付款方法將預設為「支票」及不作另行通知。

☐ (1) Direct Debit 直接扣帳

如選擇直接扣帳，需附上「直接付款授權表格」作申請，需時3-6星期

Contribution Frequency 供款週期	☐ a. Monthly Basis 按月	☐ b. Annually Basis 按年
Monthly / Annually Direct Debit Day 每月／每年直接扣帳日	☐☐ DD 日	☐☐ / ☐☐ DD / MM 日／月

- The setup of direct debit takes approximately 3 to 6 weeks from the receipt date of your completed "Direct Debit Authorization" ("DDA Form"). The eMPF Platform will send you a confirmation notifying you the success of direct debit setup. Please download "DDA Form" via visiting the website of the eMPF Platform (https://empf.org.hk/forms/en) or scanning the QR code and complete "DDA Form". 設立直接扣帳由收到完整「直接付款授權」（「直接付款授權表格」）起計，約需時三至六個星期。積金易平台將會發出確認書，通知你有關直接扣帳申請成功設立。請透過積覽積金易平台的網頁（https://empf.org.hk/forms）或掃描二維碼下載及填寫「直接付款授權表格」。
- As the setup of direct debit takes time, you may make the contribution by other payment method until the direct debit has been set up and provide payment information below (if applicable). 由於設立直接扣帳需時，你可以其他付款方法繳付供款直至直接扣帳成功設立及提供下列付款資料（如適用）。
- The eMPF Platform will arrange direct debit on the monthly / annually direct debit day indicated above. If no monthly / annually direct debit day is indicated for regular contribution, it will be defaulted to 22nd of the month or 22nd of November of the year. If the selected direct debit day falls on a Saturday, a public holiday, a gale warning day or black rainstorm warning day, it will be the following working day. 積金易平台將會在上述每月／每年直接扣帳日安排直接扣帳。如沒有就定期供款填寫每月／每年直接扣帳日，此將預設為每月的 22 日或每年的 11 月 22 日。如揀選的直接扣帳日為星期六、公眾假日、烈風或黑色暴雨警告日，則順延至隨後的工作天。
- Please note that the monthly / annually direct debit date may vary due to the transactional arrangement of the relevant bank. 請注意每月／每年直接扣帳日期或會因有關銀行的交易安排而有所不同。

Form Centre 表格中心

☐ (2) Cheque 支票

(i) Payment Means 付款途徑

不接受期票

☐ a. Cheque 支票

- Please enclose a crossed cheque in your name and made payable to "AIA Co (Trustee) Ltd – Prime". 請附上由你簽發的劃線支票，抬頭抬付「友邦（信託）有限公司－優選」。
- Post-dated cheques are not accepted. 恕不接受期票。
- Please note that MPF intermediaries are not authorized to receive MPF cheques on behalf of the eMPF Platform. You are particularly reminded to arrange submission to the eMPF Platform directly. 請注意強積金中介人並非收取強積金供款支票的正式途徑。你應直接遞交供款及有關文件予積金易平台。

(ii) Payment Details 付款詳情

a. Cheque No. 支票號碼 **123456789**

b. Payment Amount HKD 付款金額 港幣 **XXX** 元

☐ (3) Electronic Means 電子途徑

(i) Payment Means 付款途徑

☐ a. PPS 繳費靈

- Please make payment and input the merchant code of the Scheme (i.e. 400006347) via visiting website at www.ppshk.com / using "PPS on Mobile" app (as applicable); or 請透過網頁網址 www.ppshk.com ／使用「繳費靈手機程式」應用程式（適用者為準）繳付款項並輸入計劃的商戶編號（即 400006347）；或
- Please make payment and input the merchant code of the Scheme (i.e. 400006347) via calling 18031. 請透過致電 18033 繳付款項並輸入計劃的商戶編號（即 400006347）。

☐ b. Bill Payment 繳付帳單

- Please make payment via bill payment services of the designated bank(s) of the Trustee (i.e. Bank of China (Hong Kong) / HSBC). For details, please check with the designated banks for the scope of services. 請透過受託人指定銀行所提供的繳付帳單服務以繳付款項（即中國銀行（香港）／滙豐銀行）。請向指定銀行查詢有關服務範圍詳情。

(ii) Payment Details 付款詳情

a. Transaction Reference No. 交易參考編號 **123456789**

b. Payment Amount HKD 付款金額 港幣 **XXX** 元

- Please fill in transaction reference no. and provide relevant supporting document / payment slip together with this application (if applicable). Otherwise, the eMPF Platform may require additional processing time for payment processing. 請填寫交易參考編號及連同此申請表一併提供相關證明文件／付款收據（如適用）。否則，積金易平台可能需要額外時間處理款項。

友邦機密及專利資料。嚴禁分發。

E. SELF-CERTIFICATION OF TAX RESIDENCY AND TAXPAYER IDENTIFICATION NUMBER OR ITS FUNCTIONAL EQUIVALENT ("TIN") [4]
稅務居民身分自我證明及稅務編號或具有等同功能的識辨編號 (「稅務編號」) [4]

- This is a self-certification provided by you to the Trustee for the purpose of Automatic Exchange of Financial Account Information ("AEOI") in compliance with tax law and regulations (including but not limited to the Inland Revenue Ordinance (Cap. 112) and regulations based on the Organisation for Economic Cooperation and Development ("OECD") Common Reporting Standard ("CRS") for automatic exchange of information). 這是你向受託人提供的自我證明，以作自動交換財務帳戶資料用途以遵守稅務法律及規例 (包括但不限於《稅務條例》(第 112 章) 及根據自動交換資料有關的經濟合作與發展組織 (「OECD」) 《共同匯報標準》 (「CRS」) 的規則)。
- The information provided by you in this part will be updated by the eMPF Platform for all your MPF account(s) maintained in the eMPF Platform for the purpose of AEOI and CRS. 你於本部分提供的資料將會更新你於積金易平台保存的所有強積金帳戶用作自動交換財務帳戶資料及「共同匯報標準」的用途。
- Each jurisdiction has its own rules for defining tax residence, and various jurisdictions provide information on how to determine if you are resident in that particular jurisdiction for tax purposes. In general, you will find that your jurisdiction of tax residence is the jurisdiction / country in which you live. Special circumstances may cause you to be resident elsewhere or resident in more than one jurisdiction / country at the same time (dual residency) for tax purposes. For more information on jurisdiction of tax residence, please consult your tax adviser or the information at the OECD automatic exchange of information portal (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/). 每個稅務管轄區會按照其稅務法律訂定稅務居民的定義，並提供相關資料讓你判定是否屬某一稅務管轄區的稅務居民。一般而言，你的稅務居留司法管轄區／國家會根據你的居住地點而定，因此，如你有多於一處居所 (雙重居住地)，你可能會同時成為多個稅務管轄區／國家的稅務居民。有關稅務居民身分的更多資訊，請諮詢你的稅務顧問或瀏覽 OECD 的自動交換資料網頁 (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/)。
- If you are tax resident in a reportable jurisdiction [5] of Hong Kong, you will be classified as a reportable person for AEOI, the Trustee will be legally obliged to pass on the information provided in this self-certification and other financial information with respect to your account(s) to the Hong Kong Inland Revenue Department ("IRD"), and they will transmit this information to the tax authorities of which you are tax resident. 如你的稅務居民所在地屬香港申報稅務管轄區 [5]，你將會被界定為自動交換資料下的申報對象，受託人在法律上有義務將你於本自我證明中報的資料，你財務帳戶有關的某些財務資料轉交予香港稅務局，而相關資料或會與你作為稅務居民所屬的稅務機關交換。
- The member particulars, including but not limited to member name, identification document no., date of birth, residential address and correspondence address, provided in Part A forms part of this self-certification. 於 A 部分提供的成員資料，包括但不限於成員姓名、身分證明文件號碼、出生日期、居住地址及通訊地址，會成為本自我證明的一部分。
- This self-certification will remain valid unless there is any change in circumstances relating to information that makes this self-certification incorrect, inaccurate or incomplete. You must notify the eMPF Platform / the Trustee and provide an updated self-certification within 30 days of such change in circumstances. 除非情況有所改變而引致已提交的自我證明上的資料不正確、不準確或不完整，否則該已提交的自我證明仍具十足效力。如情況有所改變，你務必通知積金易平台／受託人，並需要在發生改變後 30 天內向積金易平台／受託人提供一份已更新的自我證明。
- The eMPF Platform **MUST** obtain the complete and valid tax residency self-certification for the setting up of member account. To avoid any delay in the setting up of member account and contribution settlement (if any), please read and complete all the appropriate parts below. 積金易平台在開立成員帳戶前，**必須**取得完整及有效的稅務居民身分自我證明。為避免成員帳戶開立及供款處理 (如有) 有任何延誤，請細閱並完成以下所有適用部分。
- The eMPF Platform / The Trustee has right to require you to provide all relevant identification / verification documentation. Failure in providing the information and other personal data as requested may result in your application / instruction not being able to be processed. 積金易平台／受託人有權要求你提供所有相關的身分證明／驗證文件。如未能提供所需資料及其他個人資料，可能導致你的申請／指示不獲處理。
- Kindly note that the eMPF Platform / the Trustee is not allowed to offer any tax or legal advice to you. For tax-related questions, please consult your tax adviser or visit the OECD (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) and IRD's AEOI website (http://www.ird.gov.hk/eng/tax/dta_aeoi.htm), or simply scan the QR code, for more CRS and related information. 請注意積金易平台／受託人不獲允許向你提供稅務或法律意見。任何稅務相關的疑問，請詢問專業稅務顧問或瀏覽 OECD (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) 及稅務局 (http://www.ird.gov.hk/chi/tax/dta_aeoi.htm) 有關自動交換財務帳戶資料的網頁，或掃描此二維碼，以獲取更多 CRS 及相關資料。

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

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

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

如只是香港稅務居民, 不用填D(2)部分

☑ (ii) Hong Kong (and the TIN is my HKID Card No.) and also some other jurisdictions / countries
香港 (及稅務編號為本人之香港身份證號碼) 及其他司法管轄區／國家
(Please fill out the TIN [4] for all other jurisdictions / countries, other than HK, in the table of Part E(2). 請於 E(2) 部分列出所有香港以外其他司法管轄區／國家的稅務編號 [4]。)

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

如果客戶選擇了(ii)/(iii), 則需要填寫D(2)部分

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

Please list **(i)** ALL jurisdictions / countries (other than Hong Kong) where the account holder is a resident for tax purposes and **(ii)** the account holder's TIN [4] for each jurisdiction / country. If the space provided is insufficient, please provide it in the below format on additional sheet(s). 請在以下列明 **(i)** 帳戶持有人作為稅務居民的所有司法管轄區／國家（香港以外），及 **(ii)** 各司法管轄區／國家發出予帳戶持有人的稅務編號 [4]。如下列位置不敷應用，請按以下格式另加新頁。

	Jurisdiction / Country of Tax Residency 稅務居民所在司法管轄區／國家	TIN [4] 稅務編號 [4]	If no TIN available, please indicate Reason A, B or C [5] below 若未能提供稅務編號，請於下方填上理由 A、B 或 C [5]	Please explain why you are unable to obtain a TIN if you selected Reason B. 若你選擇理由 B，請在下方解釋無法取得稅務編號的原因。
a.	國家#1	稅務編號#1	A	
b.	國家#2	稅務編號#2	B	原因
c.	國家#3	稅務編號#3	C	

如果理由是B，則需要填寫原因。

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

OECD-TIN

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

Reason A 理由 A – The jurisdiction / country where the account holder is a resident for tax purposes does not issue TINs to its residents.
帳戶持有人所屬的稅務居民的司法管轄區／國家沒有向其居民發出稅務編號。

Reason B 理由 B – The account holder is unable to obtain a TIN. (Please explain why the account holder is unable to obtain a TIN in the above table if the account holder has selected this reason.)
帳戶持有人無法獲得稅務編號。（若帳戶持有人選擇這理由，請在上表解釋帳戶持有人無法獲得稅務編號的原因。）

Reason C 理由 C – No TIN is required. (Note: Only select this reason if the authorities of the relevant jurisdictions / countries of residence do not require the TIN to be disclosed.)
無需稅務編號。（註：只有在相關司法管轄區／國家的主管當局不需要披露該司法管轄區／國家發出的稅務編號方可選擇這理由。）

✦ Warning 警告：

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

F. INVESTMENT MANDATE 投資授權

Please read the following before completing Part F. 於填寫 F 部分前，請閱讀以下事項。

1. You can choose to invest your contributions (including transfer-in monies) in any constituent funds. However, if you do not wish to make any investment choice, you do not have to do so. In the event of no investment choice or no valid investment mandate is provided, all contributions (including transfer-in monies) will be invested in accordance with the Default Investment Strategy ("DIS"). 你可選擇將你的供款（包括轉入之款項）投資於任何成分基金。但是，如你不想作出任何投資選擇，可無須這樣做。如沒有作出投資選擇或沒有提交有效的投資授權，所有供款（包括轉入之款項）將按照預設投資策略進行投資。
2. DIS is a default investment arrangement as stipulated in accordance with the Mandatory Provident Fund Schemes Ordinance. The DIS is invested in the Core Accumulation Fund and the Age 65 Plus Fund according to the pre-set allocation percentages at different ages and will adjust risk by way of reducing the holding in the Core Accumulation Fund and increasing the holding in the Age 65 Plus Fund after the Member reaches 50 years of age. For more details on de-risking of the DIS, please refer to the MPF Scheme Brochure and the KSID of the Scheme. 預設投資策略是一項根據《強制性公積金計劃條例》規定的預設投資安排。預設投資策略透過於不同年齡按照預定配置百分比來投資於核心累積基金與 65 歲後基金及會隨著成員年滿 50 歲後以減持核心累積基金及增持 65 歲後基金來調整風險。有關預設投資策略降低風險機制的詳情，可參閱本計劃之強積金計劃說明書及主要計劃資料文件。
3. A valid investment mandate for the DIS or each selected fund must be, including but not limited to: 預設投資策略或每項所選基金的有效投資授權必須為，包括但不限於：
   (i) each investment allocation percentage should be an integer and at least 5%, and 每項投資分配百分比須為整數及至少 5%，及
   (ii) all of the investment allocation percentages add up to 100% in total. 全部投資分配百分比的總和等於 100%。
4. In the below events, contributions made and / or transfer-in monies from another MPF scheme(s) will be: 就下列情況，你作出的供款及／或由其他強積金計劃轉入之款項將會：
   (i) **wholly** invested in the DIS if: 全部根據預設投資策略進行投資，如：
      a. you **do not** make any investment choice; or 你**不作**任何投資選擇；或
      b. you **do not** give a valid, clear or complete investment mandate including but not limited t
      效、清晰、完整的投資授權，包括但不限於更改位置旁沒有加蓄作實；或
      c. the investment allocation percentage of any selected funds is not an integer or less than
      d. the total investment allocation percentage of the selected funds is over 100%; or 所選基金
      e. the instruction of any selected funds is unclear or illegible. 任何所選基金指示不清晰或無
   (ii) **partially** (i.e. the remaining percentage) invested in the DIS if the total investment allocatio
   餘的百分比）根據預設投資策略進行投資，如所選基金的投資分配百分比總和少於 100%。

注意： 提醒客戶分配百分比必須為 5 的倍數 而總和必須為 100 。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

5. You should note that investment markets could fluctuate significantly. Fund unit prices may go down as well as up. Please carefully consider your own risk tolerance level and financial circumstances (as well as your own retirement plan) before making any investment choices. If in doubt, please contact your financial advisor for further details. 你必須注意投資市場可能出現顯著的波動，基金單位價格可跌可升。在作出投資選擇前，你必須小心衡量個人可承受風險的程度及財政狀況（包括你的退休計劃）。如有任何疑問，請諮詢你的財務顧問了解更多詳情。
6. Contributions and / or transfer-in monies from another registered scheme (if any) will be invested in the following manner: 供款及／或由另一註冊計劃轉入之款項（如有）將根據下列比例進行投資：

DIS / Fund Code 預設投資策略／基金編號	Investment Strategy / Name of Constituent Fund 投資策略／成分基金名稱	Investment Allocation Percentage 投資分配百分比			
Investment Strategy 投資策略					
DS	MPF Default Investment Strategy 強積金預設投資策略 Internal use 內部專用：DIS				%
Equity Funds – Index-Tracking Collective Investment Scheme Series [7] 股票基金 – 緊貼指數集體投資計劃系列 [7]					
3G	American Fund 美洲基金				%
3E	Eurasia Fund 亞歐基金				%
3F	Hong Kong and China Fund 中港基金				%
83	World Fund 全球基金				%
Fixed Income Funds 固定入息基金					
3D	Asian Bond Fund 亞洲債券基金				%
63	Global Bond Fund 環球債券基金				%
R3	MPF Conservative Fund 強積金保守基金				%
Dynamic Asset Allocation Funds 動態資產配置基金					
3H	China HK Dynamic Asset Allocation Fund 中港動態資產配置基金				%
93	Manager's Choice Fund 基金經理精選退休基金				%
Equity Funds 股票基金					
L3	Asian Equity Fund 亞洲股票基金		5	0	%
E3	European Equity Fund 歐洲股票基金				%
D3	Greater China Equity Fund 大中華股票基金		5	0	%
N3	North American Equity Fund 北美股票基金				%
53	Green Fund 綠色退休基金				%
Guaranteed Fund 保證基金					
T3	Guaranteed Portfolio 保證組合				%
Lifestyle Funds 人生階段基金					
W3	Growth Portfolio 增長組合				%
B3	Balanced Portfolio 均衡組合				%
V3	Capital Stable Portfolio 穩定資本組合				%
NF	Core Accumulation Fund [8] 核心累積基金 [8]				%
NA	Age 65 Plus Fund [8] 65 歲後基金 [8]				%
	Total 總數	1	0	0	%

[7] These Constituent Funds are not index-tracking funds. 有關成分基金不是緊貼指數基金。
[8] Automatic de-risking features of the DIS does not apply to these constituent funds as standalone investments (rather than as part of the DIS). 預設投資策略的自動降低風險機制並不適用於作為該等成分基金的獨立投資（而非預設投資策略的一部分）。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

G. "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE SCHEME 積金易平台及本計劃收集個人資料聲明（「聲明」）

Personal Information Collection Statement of The eMPF Platform 積金易平台收集個人資料聲明

eMPF Platform Company Limited may need to collect, process and hold your personal data for the purposes of your enrolment to an MPF scheme and administration of your MPF account. Your personal data may also be used, transferred or disclosed to other parties for purposes as set out in our Personal Information Collection Statement (PICS). If you are already registered with the eMPF Platform, you have already agreed to be bound by our PICS, the latest version of which is set out below. If you are not yet registered, please refer to our PICS set out below. By providing your personal data in this form, you consent to eMPF Platform Company Limited collecting, using and holding your personal data in accordance with our Personal Information Collection Statement. 積金易平台有限公司可能需要收集、處理及持有你的個人資料，用作處理你的強積金計劃登記和你的強積金帳戶管理的用途。你的個人資料亦可能會根據我們的收集個人資料聲明中所列明的用途而被使用、轉移或披露給第三方。若你已註冊積金易平台，即表示你已同意我們的收集個人資料聲明，其最新版本載於下文。若你尚未註冊，請參閱我們以下的收集個人資料聲明。你透過此表格提供個人資料，即表示你同意積金易平台有限公司根據我們的收集個人資料聲明收集、處理及持有你的個人資料。

Personal Information Collection Statement 收集個人資料聲明

向客戶講解積金易平台收集個人資料聲明

This Personal Information Collection Statement (this **"Statement"**) is made in accordance with the requirements of the Personal Data (Privacy) Ordinance (Chapter 486 of the Laws of Hong Kong) (the **"PDPO"**) and the guidelines issued by the Office of the Privacy Commissioner for Personal Data. This Statement notifies you of the personal data from time to time collected, processed and held by eMPF Platform Company Limited (**"we"**, **"us"** or **"eMPF Company"**), the purposes for which your personal data will be used and to whom it may be disclosed, and your rights under the PDPO to access and correct your personal data. 本收集個人資料聲明（本**「聲明」**）是根據《個人資料（私隱）條例》（香港法例第 486 章）（**「《私隱條例》」**）的規定及個人資料私隱專員公署發出的指引而制定。本聲明旨在向你闡釋積金易平台有限公司（**「本公司」**、**「我們」**或**「積金易公司」**）不時收集、處理及持有你的個人資料、有關個人資料的用途和可能獲提供有關個人資料的對象，以及你可根據《私隱條例》查閱及更正有關個人資料的權利。

You may learn more about our policies on the collection, use, transfer, retention and protection of your personal data from our Privacy Policy, which is available at www.empf.org.hk/page/privacy-policy . 你可於本公司的《私隱政策》(www.empf.org.hk/page/privacy-policy) 了解更多關於我們收集、使用、移轉、保留及保護你的個人資料的政策。

1. Personal Data collected and maintained by eMPF Company 積金易公司收集及保存的個人資料

The "electronic MPF system" (as defined in the MPFSO) administered and operated by eMPF Company is designated by the Secretary for Financial Services and the Treasury under the Mandatory Provident Fund Schemes Ordinance (Chapter 485 of the Laws of Hong Kong) (the **"MPFSO"**) to, inter alia, provide Mandatory Provident Fund (**"MPF"**) scheme administration services to facilitate approved trustees of registered schemes in performing their scheme administration functions. eMPF Company provides such MPF scheme administration services through the "electronic MPF system" and other offline facilities including the service centres, administrative centres and call centres (collectively the **"eMPF Platform"**). Personal data which may from time to time be collected, processed and held by eMPF Company in respect of you includes: 根據《強制性公積金計劃條例》（香港法例第 485 章）（**「《強積金條例》」**），財經事務及庫務局局長指定以積金易公司管理和營運的「電子強積金系統」（定義見《強積金條例》）（其中包括）向強制性公積金（**「強積金」**）註冊計劃的核准受託人提供強積金計劃管理服務，以利便核准受託人執行他們的計劃管理職能。積金易公司通過「電子強積金系統」及其他實體設施，包括服務中心、行政中心以及電話支援服務中心（統稱**「積金易平台」**）提供有關強積金計劃管理服務。積金易公司可能不時收集、處理及持有與你有關的個人資料包括：

a. information which you provide during enrolment to an MPF scheme; 你就參與強積金計劃提供的資料；
b. information which you provide during registration for the eMPF Platform (including, if applicable, an image of your Hong Kong Identity Card and your selfies, which are collectively referred to as "identity verification data") and, regardless of any such registration, when you transact with the eMPF Platform; 你就登記使用積金易平台（包括你的香港身份證的影像及自拍照（統稱為「**身分驗證資料**」）（如適用）），以及你使用積金易平台（無論有否進行登記）進行交易時提供的資料；
c. information disclosed by or transferred from approved trustees of your MPF schemes; 由你的強積金計劃的核准受託人披露或移轉的資料；
d. details of transactions or other dealings in connection with your MPF schemes including, without limitation, information collected to handle your enquiries, complaints, applications, instructions and requests; 你的強積金計劃的交易詳情或其他事務往來，包括但不限於為處理你的查詢、投訴、申請、指示及要求而收集的資料；
e. (processed with your consent if required under the PDPO) information from other third parties and public sources, including but not limited to government authorities; and 來自包括但不限於政府機構的其他第三方或公共來源的資料（如《私隱條例》要求，將在獲得你同意的情況下進行處理）；及
f. information obtained or generated in the course of our performance of scheme administration services and other statutory functions under the MPFSO. 本公司根據《強積金條例》履行提供計劃管理服務及其他法定職能過程中取得或產生的資料。

Please note that personal data and other information requested (except those marked as "optional") must be provided before we can provide you with the relevant service(s) under the eMPF Platform. If you fail to provide such personal data and other information, or if they are inaccurate or incomplete, we may not be able to process your transactions and / or requests, or otherwise provide you with the relevant service. 請注意，本公司只有在取得所有我們要求有關你的個人資料及其他資料（除非標記為「可選填」外）後，方能為你提供積金易平台的相關服務。如你未能提供上述個人資料及其他資料，或該等資料屬不準確或不完整，本公司可能無法處理你的交易及／或要求，或為你提供相關服務。

2. Purposes of Collection of Personal Data 收集個人資料的用途

We may collect, process and hold your personal data for the following purposes: 本公司可收集、處理及持有你的個人資料作下列用途：

a. in relation to your identity verification data, to authenticate your identity through eKYC (but not the "iAM Smart" platform and/or the biometric authentication function built in your device) under the eMPF mobile application for accessing the eMPF Platform; 就你的身份驗證資料而言，通過積金易流動應用程式（**「應用程式」**）中的電子身份驗證程序（eKYC）（不涉及「智方便」（iAM Smart）平台及／或你裝置內建的生物辨識功能），驗證你的身份以進入積金易平台；
b. to facilitate your access to, and the management of your MPF account; 協助你查閱及管理強積金帳戶；
c. to process, administer and implement your applications, requests or instructions, and to provide you with such services as may from time to time be agreed with the approved trustees of your MPF schemes, all in connection with your MPF schemes; 處理、管理及執行你就強積金計劃所提出的申請、要求或指示，以及根據本公司不時與你的強積金計劃的核准受託人達成的協定，提供有關的服務；
d. for data matching with personal data and other information about you or your employer(s) for scheme administration and other related purposes; 就計劃管理及其他相關用途，與你或你的僱主的個人及其他資料進行比對；

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

e. for our internal business and administrative purposes, including but not limited to maintaining the security of the eMPF Platform, improvement of user experience, development of the eMPF Platform, administration of our risk management policies and procedures and for the purpose of compiling statistics and undertaking data analysis and other research; 用作本公司內部業務及行政管理的用途，包括但不限於維持積金易平台的安全、改善用戶體驗、發展積金易平台、執行風險管理政策和程序，以及用作數據統計、資料分析及其他研究用途；
f. to communicate with you, and to provide you with customer services; 與你溝通並為你提供客戶服務；
g. for complying with applicable laws and regulations, and any request or direction of, or responding to requests from, regulators, law enforcement agents or other government authorities; 遵從適用的法律和法規，以及監管機構、執法機關或其他政府部門的任何要求或指示，或回應其要求；
h. for protecting or exercising our rights, including but not limited to dealing with your complaints or inquiries, and taking any legal actions; 保障或行使本公司的權利，包括但不限於處理你的投訴或查詢，以及採取任何法律行動；
i. for handling any legal, regulatory or administrative proceedings, investigations or inquiries before any court or competent authority; 處理任何法庭或主管機關的法律、監管或行政管理程序、調查或查詢；
j. for detecting and preventing crime and other unlawful behaviour; 偵查及阻止犯罪及其他違法行為；
k. for any other purposes or functions from time to time specified or designated under the MPFSO; 《強積金條例》不時訂明或指定的任何其他用途或功能；
l. with your consent (including any indication of no objection), for conducting direct marketing in accordance with Section 4 below, whether for itself or on behalf of approved trustees of your MPF schemes; and 經你同意（包括表示不反對），根據下文第 4 條為本公司或代表你的強積金計劃的核准受託人進行直接促銷；及
m. other purposes directly relating to any of the above. 其他與任何上述內容有直接關係的用途。

3. Classes of Transferees 承轉人類別

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

a. your employers and approved trustees of your MPF schemes; 你的僱主及強積金計劃的核准受託人；
b. our agent, adviser, service provider and contractor who provides administrative, telecommunications, computer, payment, fraud prevention, insurance, data processing, information technology, legal, accounting, operational and/or other services or support to us in connection with the operations of the eMPF Platform; 任何就積金易平台的營運而向本公司提供管理、電訊、電腦、付款、反欺詐、保險、資料處理、資訊科技、法律、會計、營運及／或其他服務或支援的代理人、顧問、服務供應商或承辦商；
c. the Mandatory Provident Fund Schemes Authority（"**MPFA**"）, other government authorities and agencies, courts, regulatory or administrative bodies, law enforcement agencies and other bodies or persons to whom we are under an obligation to make disclosure under any legal, regulatory or administrative requirements applicable to us; and 強制性公積金計劃管理局（「**積金局**」）、其他政府部門及機構、法庭、監管機構或行政管理機構、執法機構及其他機構或人士，如本公司須按照任何適用法律、法規或行政命令向其作出披露；及
d. any other person as agreed with you from time to time. 你不時同意的任何其他人士。

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

4. Direct Marketing 直接促銷

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

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

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

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

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

5. Access and Correction 查閱及更正

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

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

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

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

We may require you to provide identity proof for handling your data access or correction request, and we may charge a fee for complying with your data access request. 處理個人資料查閱或更正的要求時，本公司或會要求你提供身份證明文件，並可就你的資料查閱的要求收取費用。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

6. Miscellaneous 其他事宜

We may update this Statement from time to time, and the most recent version can be found at www.empf.org.hk/pics . We will notify you of any update to this Statement and, where required by the PDPO, obtain your consent. 本公司會不時更新本聲明，最新版本可參閱 www.empf.org.hk/pics 。我們會通知你有關本聲明的更新，並在《私隱條例》有要求的情況下取得你的同意。

If there is any inconsistency or ambiguity between the English and Chinese versions of this Statement, the English version will prevail. 如本聲明的中英文版本有任何不一致或歧義，應以英文版本為準。

☐ Please tick the box if you do not agree to provide your consent for your personal data to be used for direct marketing purposes in accordance with the "Direct Marketing" section of the Personal Information Collection Statement of eMPF Platform Company Limited. Your indication herein will replace any indication of choice you may have previously provided to eMPF Platform Company Limited in relation to "Direct Marketing". 若你不同意積金易平台有限公司根據其收集個人資料聲明內的「直接促銷」部分，使用你的個人資料以作直接促銷之用途，請在方格內填上剔號。你在此作出之指示，將取代你先前可能已向積金易平台有限公司提供任何有關選擇「直接促銷」的指示。

向客戶講解AIA 計劃收集個人資料聲明

Personal Information Collection Statement of AIA MPF – Prime Value Choice 友邦強積金優選計劃收集個人資料聲明

AIA Company (Trustee) Limited (the "**Company**", "**we**", "**us**" or "**our**") is a wholly owned subsidiary of AIA Group Limited. AIA Group Limited, together with its subsidiaries and affiliates are collectively referred to in this Statement as the "AIA Group" and individually referred to as an "**AIA Entity**".
友邦（信託）有限公司（「**本公司**」、「**我們**」）乃友邦保險控股有限公司的全資附屬公司。在本聲明內，友邦保險控股有限公司連同其附屬公司及聯營公司將統稱為「**友邦集團**」並單獨稱為「**友邦機構**」。

From time to time, it is necessary for you, as (prospective) participating employers ("**Participating Employers**") and/or members ("**Members**") (collectively referred to as "**you**" or "**your**"), to provide the Company with certain personal data relating to you in connection with the application for and provision of pension schemes as well as the carrying out by the Company of other services relating to the pension schemes. Failure to supply such data may result in the Company being unable to process your application for pension schemes or to provide or continue to provide the pension schemes and/or relevant services to you. During the course of your relationship with the Company, further personal data relating to you, may also be collected in the ordinary course of our business. If you provide personal data to the Company about another individual, you confirm that you are either (i) the parent or legal guardian of the individual, or (ii) you have obtained the individual's consent to provide his or her personal data to the Company, and for such personal data to be used, processed, disclosed and transferred in accordance with this Statement.
在閣下申請及由本公司提供退休金計劃，及當本公司提供與該等退休金計劃及服務相關之其他服務時，作為（準）參與僱主（「**參與僱主**」）及／或成員（「**成員**」）（統稱「**閣下**」），閣下必須不時向我們提供若干關於閣下的個人資料。若閣下未能提供該等資料，可能會令本公司無法處理閣下的退休金計劃申請或向閣下提供或繼續提供退休金計劃及／或相關服務。在閣下與本公司的日常業務過程中，本公司亦可能會在日常業務運作的過程中收集關於閣下的其他個人資料。若閣下向本公司提供關於其他人士的個人資料，閣下確認閣下是 (i) 該名人士的父母或法定監護人，或 (ii) 閣下已獲得該名人士的同意，向本公司提供該人士的個人資料，並同意該等個人資料可根據本聲明被使用、處理、披露及轉移。

(1) PURPOSES FOR COLLECTING PERSONAL DATA 個人資料收集目的

Personal data relating to you held or collected by the Company (including but not limited to credit information and claims history) may be used by the Company for the following purposes ("**Purposes**"):
本公司所持有或收集的有關閣下的個人資料（包括但不限於信用資料及以往申索紀錄）可能會被本公司用作下列用途（「**訂明用途**」）：

(i) processing, accepting and/or rejecting applications for Pension Schemes (as defined below);
處理、接受及／或拒絕該等退休金計劃（如下文定義）的申請；

(ii) the administration and/or management of or in connection with the contributions or benefits or accounts in respect of the Participating Employers and/or Members under the pension schemes (the "**Pension Schemes**") administered by AIA Entities;
由友邦機構執行的退休金計劃（「**該等退休金計劃**」）下參與僱主及／或成員的供款、權益或帳戶的執行及／或管理，或與其供款、權益或帳戶相關的執行及／或管理；

(iii) providing Pension Schemes and related services to you, and processing requests made by you, from time to time in relation to the Pension Schemes and related services, including but not limited to making contributions, transfer of benefits, switching of pension funds and withdrawal of benefits;
為閣下提供該等退休金計劃及相關服務，並處理閣下不時就該等退休金計劃及相關服務提出的要求，包括但不限於作出供款、轉移權益、退休基金轉換及提取權益；

(iv) subject to your consent, conducting direct marketing activities of pension products and related services offered by AIA Entities as described in paragraph (3) below;
如已取得閣下同意，進行下文第 (3) 段所述友邦機構提供的退休金產品及相關服務的直接促銷活動；

(v) performing functions and activities incidental to the provision of Pension Schemes and related services, including, without limitation, reporting, maintenance of online and other services, identity verification, data analysis, research and statistical analysis;
執行與所提供的該等退休金計劃及相關服務相關的功能及活動，包括但不限於報告、維持網上及其他服務、核實身份、資料分析、研究及統計分析；

(vi) improving and furthering the provision of Pension Schemes and related services (including through customer research or surveys) offered by AIA Entities, subject to applicable legislation;
在適用法例規限下，提升及進一步提供由友邦機構提供的該等退休金計劃及相關服務（包括透過客戶研究或調查）；

(vii) complying with the obligations, requirements and/or arrangements for disclosing and using data that bind on or apply to the Company and/or the AIA Group or that the Company and/or the AIA Group is expected to comply with according to:
履行根據下列各項對本公司及／或友邦集團具有約束力或適用或期望本公司及／或友邦集團遵守的就披露及使用資料的義務、要求及／或安排：

(a) any law binding on or applying to it within or outside the Hong Kong Special Administrative Region ("**Hong Kong**") existing currently and in the future (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information);
不論於香港特別行政區（「**香港**」）境內或境外及不論目前或將來存在的對其具法律約束力或適用的任何法律（例如稅務條例及當中的條款，包括與自動交換財務帳戶資料相關的條款）；

友邦機密及專利資料，嚴禁分發。

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(b) any guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement [illegible] industry bodies or associations of insurance or financial services providers within or outside Hong Kong existing currently and in the future (e.g. guidelines or guidance given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information); or
不論於香港境內或境外及不論目前或將來存在的任何法律、監管、政府、稅務、執法或其他機關，或保險或金融服務供應商的自律監管機構或行業組織或協會所作出或發出的任何指引（例如稅務局作出或發出的指引，包括與自動交換財務帳戶資料相關的指引）；或

(c) any present or future contractual or other commitment with local, national or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of insurance or financial services providers that is assumed by or imposed on the Company or the AIA Group by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations;
本公司或友邦集團因其位於或跟相關本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或保險或金融服務供應商的自律監管機構或行業組織或協會的司法管轄區有關的金融、商業、業務或其他利益或活動，而向該等本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或有關的自律監管機構或行業組織或協會承擔或被該等施加的任何目前或將來的合約或其他承諾；

(viii) complying with any obligations, requirements, policies, procedures, measures or arrangements for sharing data and information within the AIA Group and/or any other use of data and information in accordance with any group-wide programs for compliance with sanctions or prevention or detection of money laundering, terrorist financing or other unlawful activities;
遵守友邦集團為符合制裁或預防或偵測洗黑錢、恐怖分子融資活動或其他非法活動的任何方案就於友邦集團內共用資料及數據及／或資料及數據的任何其他使用而指定的任何義務、要求、政策、程序、措施或安排；

(ix) enabling an actual or proposed assignee, transferee, participant or sub-participant of the Company's rights or business (or portions thereof) to evaluate or carry out the transaction intended to be the subject of the assignment, transfer, participation or sub-participation; and
允許本公司的權利或業務的實際或建議承讓人、受讓人、參與人或附屬參與人，就擬涉及的轉讓、出讓、參與或附屬參與的交易（或其部分）進行評估或執行有關交易；及

(x) any other purposes relating to the purposes listed above.
與上述用途有關的其他用途。

(2) TRANSFER OF PERSONAL DATA
個人資料的轉移

Personal data held by the Company relating to you will be kept confidential but the Company may provide such data to the following parties, whether inside or outside of Hong Kong, to fulfil the Purposes set out above in paragraph (1) of this Statement:
本公司所持有關於閣下的個人資料將會保密，但本公司可能會向以下各方，不論於香港境內或境外，提供該等資料以符合本聲明以上第 (1) 段所列出的訂明用途：

(i) any agent, contractor or third party service provider who provides services to the Company in connection with the operation of its pension business including administrative, telecommunications, computer, payment, data processing, storage, customer research or survey or other services in connection with the operation of the Pension Schemes;
就退休金業務運作向本公司提供服務的任何代理人、承包人或第三方服務供應商，包括行政、電訊、電腦、付款、資料處理、儲存、客戶研究或調查或其他與該等退休金計劃運作相關的服務；

(ii) relevant Participating Employers (if applicable);
相關參與僱主（如適用）；

(iii) any person or entity to whom the Company or the AIA Group is under an obligation or otherwise required to make disclosure under the requirements of any law or rules, regulations, codes of practice, guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations binding on or applying to the Company or the AIA Group or with which the Company or the AIA Group is expected to comply, or to establish, exercise or defend or to protect legal claims, to protect the rights, property or safety of the Company or the AIA Group, or any disclosure pursuant to any contractual or other commitment of the Company or the AIA Group with local, national or foreign legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations, all of which may be within or outside Hong Kong and may be existing currently and in the future;
本公司或友邦集團根據法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織或協會所作出或發出對本公司或友邦集團具有約束力或適用或期望其遵守的法律或規則、規例、實務守則、指引或為建立、行使或抗辯或保護法律索償、保護本公司或友邦集團的權利、財產或安全，或根據本公司或友邦集團向本地、國家或外地的法律、監管、政府、稅務、執法或其他機關，或自律監管機構或行業組織或協會的任何合約或其他承諾（以上不論於香港境內或境外及不論目前或將來存在的），而有義務或以其他方式被要求向其作出披露的任何人士或機構；

(iv) AIA Entities;
友邦機構；

(v) any actual or proposed assignee, transferee, participant or sub-participant of the Company's rights or business; and
本公司的權益或業務的任何實際或建議承讓人、受讓人、參與人或附屬參與人；及

(vi) any persons who/which you have given instructions, authorization and consent to the Company in order to communicate with and provide information to them.
任何閣下已發出指示、授權及同意本公司向其溝通及提供資料的人士。

From time to time, AIA Group or the Company may purchase a business or sell one or more of the Company's business(es) (or portions thereof). In the event that AIA Group or the Company purchase(s) a business, the personal data received with that business would be treated in accordance with this Statement, if it is practicable and permissible to do so. In the event that AIA Group or the Company sell(s) a business, provisions will be included in the selling contract requiring the purchaser to treat your personal data in the same manner required by this Statement.
友邦集團或本公司可能不時收購業務或出售一項或多項本公司業務（或其部分）。如友邦集團或本公司收購業務，若情況可行及允許，該業務下接收的個人資料將會根據本聲明處理。如友邦集團或本公司出售業務，銷售合約中將包含要求買方按本聲明所要求的的方式處理閣下的個人資料之條款。

友邦機密及專利資料。嚴禁分發。

(3) USE AND PROVISION OF PERSONAL DATA IN DIRECT MARKETING
在直接促銷中使用及提供個人資料

Subject to your consent, the Company may use your personal data we collected for direct marketing of Pension Schemes and related services as described below:
如本公司已取得閣下同意，本公司可以把我們收集的閣下之個人資料用於該等退休金計劃及相關服務的直接促銷如下所述：

(i) your name, your contact details, products and services portfolio information, transaction pattern and behaviour, financial background and demographic data of you collected by the Company from time to time may be used by the Company in direct marketing; and
本公司可以把本公司不時收集的閣下之姓名、閣下之聯絡資料、產品及服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷；及

(ii) the pension products and related services offered by AIA Entities may be marketed.
可以就友邦機構提供的退休金產品及相關服務進行促銷。

If you do not wish the Company to use your personal data we collected for direct marketing of pension products and related services, you may exercise your opt-out right by notifying the Company. To exercise your opt-out right, you may write to the Data Protection Officer of the Company at the address and email address provided in paragraph (4) of this Statement, or provide the Company with your opt-out choice in the relevant application form (if applicable).
如閣下不希望本公司使用本公司收集的閣下之個人資料作退休金產品及相關服務的直接促銷，閣下可通知本公司以行使閣下的拒絕促銷選擇權。如欲行使拒絕促銷選擇權，閣下可根據本聲明第 (4) 段所提供的地址及電郵以書面向本公司的資料保障主任提出有關要求，或於有關的申請表格內向本公司表達閣下拒絕促銷的意願（如適用）。

(4) DATA ACCESS AND CORRECTION RIGHT
查閱及改正資料權利

In accordance with the Personal Data (Privacy) Ordinance (the "**Ordinance**"), you have the right to request access to and the correction of any of your personal data held by the Company, by writing to the Data Protection Officer of the Company at the following address and email:
根據個人資料（私隱）條例（「**條例**」）規定，閣下有權要求查閱及更正任何本公司持有閣下的個人資料，請以書面經以下地址及電郵向本公司的資料保障主任提出：

The Data Protection Officer
AIA Company (Trustee) Limited
c/o AIA International Limited (as administrator)
12/F, AIA Tower, 183 Electric Road,
North Point,
Hong Kong
Email: AIAHK.Compliance@aia.com

資料保障主任
友邦（信託）有限公司
轉交友邦保險（國際）有限公司（作為管理人）
香港北角電氣道 183 號友邦廣場 12 樓
電郵：AIAHK.Compliance@aia.com

According to the Ordinance, the Company has the right to charge a reasonable fee for the processing of any data access request.
根據條例，本公司有權就處理任何查閱資料要求收取合理費用。

(5) You also have the right to request for the Company's policies and practices in relation to personal data and to be informed of your personal data that is held by the Company by writing to the Company's Data Protection Officer at the address and email provided in paragraph (4) of this Statement.
閣下亦有權根據本聲明第 (4) 段所提供的地址及電郵向本公司的資料保障主任索取本公司有關個人資料私隱的政策及實務運作資料，並獲告知本公司持有的閣下之個人資料。

(6) Nothing in this Statement shall limit your rights under the Ordinance.
本聲明不會限制閣下在條例下所享有的權利。

(7) The Company retains the right to change this Statement.
本公司保留修改本聲明的權利。

(8) A Privacy Addendum under the Personal Information Protection Law of the People's Republic of China supplements this Statement and is available at https://www.aia.com.hk/en/privacy-statement-main. The Privacy Addendum applies to you if you are within mainland China.
根據中華人民共和國《個人信息保護法》而訂立的私隱附錄就本聲明進行補充，並可在以下網址下載：
https://www.aia.com.hk/zh-hk/privacy-statement-main。若閣下正身處中國大陸，該私隱附錄將適用於閣下。

☐ Please tick the box if you do not agree to provide your consent for (i) eMPF Platform Company Limited to transfer your personal data to the Trustee of the MPF scheme in which you enrol; and (ii) such Trustee to transfer your personal data to the Sponsor of the MPF scheme in which you enrol for direct marketing purposes in accordance with (a) the Personal Information Collection Statement of eMPF Platform Company Limited; and (b) the Personal Information Collection Statement of such Trustee. 若你不同意 (a) 積金易平台有限公司根據其收集個人資料聲明及 (b) 你所登記的強積金計劃受託人根據其收集個人資料聲明第分 (i) 轉移你的個人資料予你所登記的強積金計劃的受託人，及 (ii) 該受託人轉移你的個人資料予你所登記的強積金計劃的保薦人，作直接促銷之用途，請在方格內填上剔號。

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H. AUTHORIZATION AND DECLARATION 授權及聲明

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

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

友邦機密及專利資料。嚴禁分發。

12. In the absence of wilful default, gross negligence or fraud, I agree to indemnify and keep the eMPF Platform / the Trustee indemnified against any and all losses, costs, expenses, actions, proceedings suffered by the eMPF Platform / the Trustee related to my participation in the Scheme. 在沒有故意失責、嚴重疏忽或欺詐外的情況下，倘若積金易平台／受託人因執行本人參加計劃的事宜，而導致積金易平台／受託人需要承擔任何及所有損失、成本、費用或就任何行動或訴訟，本人同意作出有關賠償予積金易平台／受託人。

Signature of Member ^ 成員簽署 ^	Date 日期
Peter Chan	31 / 10 / 2025 DD 日 / MM 月 / YYYY 年

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

+ Warning 警告：

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

僅供內部培訓之用

MISCELLANEOUS 其他

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

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



OR visit aia.com.hk

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



OR visit aia.com.hk

友邦機密及專利資料。嚴禁分發。

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CHECKLIST OF APPLICATION DOCUMENTS 申請文件清單

MPF account setup may be affected if you do not submit all required document(s) and information. The Trustee reserves the right to request additional information and documents for the purpose of complying with regulatory requirements. 如你未能提供全部所需文件及資料，可能會影響開立此強積金帳戶。受託人保留索取更多資料及文件的權利，以作遵守監管規定之目的。

1. Copy of HKID Card / Passport 香港身份證／護照副本 (For Hong Kong non-permanent resident, please enclose a copy of Passport. 如非香港永久性居民，請附上護照副本。)
2. Supporting document(s) for the proof of source of fund 資金來源證明文件 (If applicable 如適用)

Submission Channels 遞交途徑	Enquiries 查詢
1. Post: PO Box 98929 Tsim Sha Tsui Post Office 郵寄：尖沙咀郵政局郵政信箱 98929 號	1. eMPF Customer Service Hotline 積金易客戶服務熱線：183 2622
2. Drop-in Box in any one of the eMPF Service Centres below 下列任何一間積金易服務中心的投遞箱	2. Email address 電郵地址：enquiry@support.empf.org.hk
3. Email address 電郵地址：forms@support.empf.org.hk	3. Fax 傳真：3197 2922
4. Fax 傳真：3197 2988	
Please do NOT submit duplicate copies to avoid duplication. 請勿遞交相同表格，以免重複。	

eMPF Service Centres Address & Service Hours 積金易服務中心地址及服務時間

Hong Kong Island 香港島	Kowloon 九龍	New Territories 新界
Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong 香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室	Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon 九龍尖沙咀東部麼地道 77 號華懋廣場 12 樓 1205-6 室	Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories 新界荃灣楊屋道 8 號如心廣場第 2 座 18 樓 1802A 室

Service Hours 服務時間：

Monday to Friday	星期一至五	9:00 am – 6:00 pm	上午 9 時 至 下午 6 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

eMPF Customer Service Hotline Service Hours 積金易客戶服務熱線服務時間

Monday to Friday	星期一至五	9:00 am – 7:00 pm	上午 9 時 至 下午 7 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

MPF INTERMEDIARY DETAILS 強積金中介人資料 (For MPF Intermediary Use Only 只供強積金中介人填寫)

Intermediary Name 1 中介人名稱 1	Wong Man Kit	Intermediary Name 2 中介人名稱 2	
MPF Registration No. 強積金註冊編號	123456	MPF Registration No. 強積金註冊編號	
Agent / Broker Code. 經紀／代理人編號	A0001	Agent / Broker Code. 經紀／代理人編號	

!!!重要提示!!!

如使用此積金易表格，需額外提交友邦強積金客戶聲明及同意書至AIA
此申請表格及簽名核實證明文件（SV）則提交至積金易平台

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

GUIDE ON TAX DEDUCTIBLE VOLUNTARY CONTRIBUTIONS ("TVC") ACCOUNT 可扣稅自願性供款帳戶指南

Opening of a TVC Account 開立可扣稅自願性供款帳戶

1. TVC refers to contributions paid into a TVC account of a registered scheme under section 11A of the Mandatory Provident Fund Schemes Ordinance (the "Ordinance"). It is a new type of contributions and is different from the voluntary contributions as defined in section 11 of the Ordinance. Scheme member who wishes to make TVC should open a TVC account in a registered scheme and make TVC directly to the scheme without going through his / her employer. 可扣稅自願性供款是根據《強制性公積金計劃條例》(「條例」)第 11A 條向註冊計劃的可扣稅自願性供款帳戶內繳付的供款。可扣稅自願性供款是一種新類型的自願性供款，並不同「條例」第 11 條所界定的自願性供款。希望作可扣稅自願性供款的計劃成員可在註冊計劃中開設一個可扣稅自願性供款帳戶，並直接向該計劃供款，而毋須通過其僱主。
2. There should be ONLY one TVC account for a member in an MPF scheme. 成員於每個強積金計劃應只有一個可扣稅自願性供款帳戶。
3. The following persons ("Eligible Person") are eligible to open a TVC account in an MPF scheme 以下人士（「合乎資格人士」）有資格在強積金計劃下開設可扣稅自願性供款帳戶：
   (i) Current holders of contribution accounts or personal accounts of MPF schemes; or 強積金計劃供款帳戶或個人帳戶的現時持有人；或
   (ii) Current members of MPF Exempted ORSO Schemes. 獲強積金豁免的職業退休計劃的現時成員。

Contributions Arrangement of TVC 可扣稅自願性供款的供款安排

4. Voluntary contributions by members that are made through their employers to their contribution accounts are not TVC and such voluntary contributions will not be eligible for claiming tax deduction. 成員通過其僱主向其供款帳戶所作的自願性供款並不定義為可扣稅自願性供款，此自願性供款並不符合資格申請減稅。
5. The Member can choose to make contributions on a regular or lump sum basis: 成員可選擇作定期／整筆供款：
   (i) Regular Contribution: The minimum amount of monthly and yearly contribution is HKD300 and HKD3,600 respectively.
   定期供款: 每月和每年最低供款額分別為港幣300元及港幣3,600元。
   (ii) Lump Sum Contribution: The minimum contribution amount is HKD1,000.
   整筆供款: 最低供款額為港幣1,000元。
6. The Member can choose the following payment method(s) for making contribution: 成員可選擇下列的付款方法供款：
   (i) Direct Debit. Please complete "Direct Debit Authorization" ("DDA Form"). 直接扣賬。請填寫「直接付款授權」(「直接付款授權表格」)。
   (ii) Cheque 支票
   (iii) Electronic Means 電子途徑
7. If the Member wishes to change the contribution amount, the Member should submit the change request via eMPF Member Portal or complete and return "Contribution Change Form (For Special Voluntary Contributions Account: Happy Retirement Savings Program / Tax Deductible Voluntary Contributions Account)" and / or "DDA Form" to the eMPF Platform. 成員如擬更改供款金額，成員必須透過積金易成員平台提交更改指示或填寫及交回「更改供款表格（特別自願性供款帳戶：退休樂／可扣稅自願性供款帳戶適用）」及／或「直接付款授權表格」予積金易平台。

Portability of TVC 可扣稅自願性供款的可攜性

8. The Member can choose to transfer ALL (but not part) of the benefits from one TVC account to another TVC account in another MPF scheme at any time. 成員可以隨時選擇將所有（但不是部分）的權益從一個可扣稅自願性供款帳戶轉移到另一個強積金計劃下的可扣稅自願性供款帳戶內。

Withdrawal of TVC 提取可扣稅自願性供款

9. All existing preservation and withdrawal requirements applicable to MPF mandatory contributions will apply to benefits derived from TVC. In other words, scheme members can only withdraw their benefits derived from TVC in the following circumstances: 強積金強制性供款的所有現行保存及提取條款，均適用於由可扣稅自願性供款所衍生的權益。換句話說，計劃成員只能在以下情況下從其可扣稅自願性供款帳戶提取權益：
   (i) Retirement 退休 (attaining the age of 65 年滿 65 歲)
   (ii) Early retirement 提早退休 (attaining the age of 60 and ceased all employment / self-employment with no intention of becoming employed or self-employed again 年滿 60 歲並已終止所有受僱／自僱工作，且無意再次受僱或自僱)
   (iii) Permanent departure from Hong Kong 永久性地離開香港
   (iv) Total incapacity 完全喪失行為能力
   (v) Terminal illness 罹患末期疾病
   (vi) Small balance 小額結餘
   (vii) Death 死亡
10. TVC will be fully vested in the member once it is paid into the scheme. TVC paid into the scheme cannot be refunded / withdrawn (e.g. cannot be refunded for TVC made in excess of the maximum amount of deduction allowable under the Inland Revenue Ordinance (Cap. 112)) unless under specified circumstances as mentioned above. 可扣稅自願性供款一旦支付給該計劃，該供款將完全歸屬該成員。已向計劃作出的可扣稅自願性供款將不能退款或提取（例如：不能退回超出根據《稅務條例》(第 112 章) 訂明可扣除的項目金額上限的可扣稅自願性供款），惟上述之特定情況除外。
11. Same as other voluntary contributions, the right or entitlement of the scheme members to any benefits derived from TVC in an MPF scheme may not be excluded from the property of the scheme member for the purposes of the Bankruptcy Ordinance. 與其他自願性供款一樣，計劃成員在強積金計劃中由可扣稅自願性供款所衍生的任何權益或權利，或不能就《破產條例》的目的排除在計劃成員的財產之外。

Claiming of Tax Deduction of TVC 申請可扣稅自願性供款的稅務扣減

12. It is the responsibility of the Member to keep track of the total amount of TVC made in a year of assessment for completion and filing of tax return. It should be noted that the maximum amount of deductions allowable under salaries tax and tax under personal assessment in a year of assessment under the Inland Revenue Ordinance (Cap. 112) is an aggregate limit for both TVC and qualifying deferred annuity policy premiums rather than for TVC only. 成員有責任自行記錄每個課稅年度已作出之可扣稅自願性供款總額以作填寫及提交報稅表之用。請注意，根據《稅務條例》(第 112 章)，薪俸稅及個人入息課稅於課稅年度之最高免稅額是可扣稅自願性供款和合資格延期年金保費的總限額，而非只計算可扣稅自願性供款。
13. Kindly note that only the amount of TVC made by or in respect of the member during the assessment year is tax deductible but not the amount of TVC transferred in from other TVC accounts. 請注意，成員只有於該課稅年度內所作之可扣稅自願性供款額可獲扣稅，但從其他可扣稅自願性供款帳戶轉入的可扣稅自願性供款金額並不獲扣稅。

Trustee's Regulatory Obligations 受託人的法規要求

14. Trustee reserves the right not to accept this application or terminate the TVC account (if applicable) in case member cannot satisfy the requirements on any of the Trustee's regulatory obligations. 如成員未能符合受託人任何就有關法規的要求，受託人保留不接受可扣稅自願性供款帳戶的申請或終止可扣稅自願性供款帳戶的權利（如適用）。

友邦機密及專利資料，嚴禁分發。

僅供內部培訓之用

計劃成員整合個人賬戶申請表P(C)範例

友邦機密及專利資料。嚴禁分發。

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eMPF 積金易

表格用途：
整合過往多個賬戶至一個個人賬戶

Go Green with E-Submission for Efficiency
為更有效率請使用電子表格
eMPF Web Portal 積金易網上平台

Internal use only 內部專用
eMPF Received Date:
P(C)

SCHEME MEMBER'S REQUEST FOR ACCOUNT CONSOLIDATION FORM
[FORM MPF(S) – P(C)] (For consolidating multiple personal accounts into one account)
計劃成員整合個人帳戶申請表 [FORM MPF(S) – P(C)] (適用於整合多個個人帳戶至一個帳戶)

Section 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap. 485A)
（強制性公積金計劃（一般）規例）（第 485A 章）第 149 條

P(C)

Important Notes 重要事項：

1. eMPF Platform Company Limited ("eMPF Company"), a wholly owned subsidiary of the Mandatory Provident Fund Schemes Authority ("MPFA"), will provide the scheme administration services to you through the eMPF Platform, subject to the "General Terms and Conditions of the eMPF Platform" which can be accessed from https://empf.org.hk/tnc/en. This form is only applicable to the new MPF scheme which has got onboard to the eMPF Platform. For details, please refer to the Appendix B: List of "Personal Information Collection Statement" ("PICS") of The eMPF Platform and The Onboarded MPF Schemes. If new MPF scheme has not yet got onboard to the eMPF Platform, please complete the relevant transfer form provided by the new trustee. 積金易平台有限公司（「積金易公司」）是強制性公積金計劃管理局（「積金局」）的全資附屬公司。積金易公司將根據「積金易平台一般條款及細則」（可於 https://empf.org.hk/tnc 瀏覽），透過積金易平台為你提供計劃行政服務。本表格只適用於已轉移至積金易平台的強積金計劃。詳情請參閱附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》（「聲明」）列表。如新強積金計劃尚未轉移至積金易平台，請填寫由新受託人提供的相關轉移表格。

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

2. Please read the Explanatory Notes and Guide to Transfer of MPF Accrued Benefits ("Benefits") by scheme member carefully before completing this form. 填寫本表格前，請先細讀註釋及計劃成員轉移強積金累算權益（「權益」）指南。
3. Please complete this form in BLOCK LETTERS with black or blue pen and tick the appropriate box(es). Please countersign beside any amendment. 請用黑色或藍色筆以正楷填寫本表格，並在適當空格內填上剔號。如有刪改，請於更改位置旁加簽。
4. The signature (including countersign) in this form should match with the signature specimen of the original account. 本表格的簽署（包括加簽）必須與原帳戶的簽署樣式相符。
5. The eMPF Platform will process this request upon receipt of this completed form and all relevant supporting document(s) (if any). If there are any omissions (including but not limited to missing page(s) / supporting document(s)), the eMPF Platform may not be able to process this request. 積金易平台收到完整表格及相關證明文件（如有）後，才會處理有關指示。如有遺漏（包括但不限於頁數／證明文件不齊全），積金易平台可能未能執行此指示。
6. If (i) mobile phone no., (ii) email address and / or (iii) correspondence address of the scheme member provided in this form is different from the records of the eMPF Platform AND the signature in this form matches with the signature specimen of the original account, the eMPF Platform will update those information to the original member account(s) as indicated in the form. 如計劃成員在本表格提供的 (i) 手提電話號碼、(ii) 電郵地址及／或 (iii) 通訊地址與積金易平台的紀錄不同，而本表格上的簽署與原帳戶的簽署樣式相符，積金易平台便會更新該資料至本表格所指示的原有成員帳戶。
7. 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 MPFA. 你就此項轉移申請提供的個人資料，將用作處理你整合帳戶的申請。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，包括積金局。
8. The information provided in this form will be used in accordance with the relevant MPF legislation and for the purposes mentioned in the PICS of the eMPF Platform and the Schemes referred / listed in Part B and C below. For details, please refer to the Appendix B. 本表格所有已提供的資料將按照有關強積金法例、積金易平台及下列 B 及 C 部分所指／所列計劃「聲明」處理。詳情請參閱附錄 B。

A. SCHEME MEMBER'S DETAILS 計劃成員資料

(1) Name [Note 1] 姓名 [註 1] (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同)

Surname in English 英文姓氏: CHAN

Given Name in English 英文名字: TAI MAN ("the Member")

Name in Chinese 中文姓名: (Surname 姓氏) 陳 (Given Name 名字) 大文 (「成員」)

(2) Identification 身分證明

☑ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼: Y1234567

友邦機密及專利資料。嚴禁分發。

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(3) Contact Details 聯絡資料

(i) Mobile Phone No. 手提電話號碼: 852 (Country / Area Code * 國家／地區編號 *) 62342345

(ii) Daytime Phone No. / Secondary Telephone No. 日間聯絡電話號碼／第二聯絡電話號碼: (Country / Area Code * 國家／地區編號 *)

* SMS (If applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊 (如適用) 只發送至香港手提電話號碼，如未有提供國家／地區編號，將預設為「香港 (852)」。

(iii) Email Address 電郵地址 (If any 如有): chantaiman123@gmail.com

(4) Correspondence Address 通訊地址 (Please provide either English OR Chinese address 請提供英文或中文地址)

Flat / Room 單位／室: C

Floor 樓數: 30

Block 座: 2

Building / Estate 大廈／屋苑: 開心大廈

Street (Street No. and Street Name) 街道 (街號及街道名稱): 開心路10號

District Area 區域: 上環

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *:

Country * / Region * 國家 * ／地區 *:

Postal code * 郵政編號 *:

* Applicable to address outside Hong Kong only 只適用於香港以外地址

B. MY ELECTED SCHEME 我選擇的計劃

此部分是填寫AIA計劃的資料 (轉入資金)

I elect to transfer all MPF accrued benefits (benefits) from my personal accounts indicated in the Appendix A to my elected scheme Note 2
本人選擇把在附錄 A 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

(1) Name of My Elected Scheme 本人選擇的計劃名稱
(Please refer to the Appendix A: List of My Personal Accounts for Consolidation 請參閱附錄 A：本人選擇整合的個人帳戶列表)

友邦強積金優選計劃 ("New Scheme" 「新計劃」)

(2) Account Type 帳戶類別 (Select one only and tick as appropriate 只可選擇一項，請於適當方格內填上剔號)

☐ (i) Personal account 個人帳戶

如客戶需要整合有多個個人賬戶，請直接☑個人賬戶；並填寫選擇計劃之計劃成員賬戶號碼

OR 或

☐ (ii) Contribution account 供款帳戶
(Employer Account No. Note 3 僱主帳戶號碼 註 3)

(3) Member Account No. Note 4 **成員帳戶號碼** 註 4: 12345678

必須清楚填寫AIA的帳戶號碼

友邦機密及專利資料。嚴禁分發。

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C. AUTHORIZATION AND DECLARATION 授權及聲明

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

1. I hereby give consent to the trustee of my elected scheme, the eMPF Platform 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. 本人同意，本人選擇的計劃的受託人、積金易平台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。
2. I have read and understood the General Terms and Conditions of the eMPF Platform, the Important Notes, the Explanatory Notes, the Guide to Transfer of MPF Accrued Benefits ("Benefits") by Scheme Member and the PICS of the eMPF Platform and my elected scheme, and to the best of my knowledge and belief, the information given in this form and Appendix A is correct and complete, and have voluntarily elected to transfer my benefits in accordance with this form. 本人已閱讀及明白積金易平台一般條款及細則、重要事項、註釋、計劃成員轉移強積金累算權益 (「權益」)指南及積金易平台及本人所選計劃「聲明」的內容，而盡本人所知所信，本表格及附錄 A 所提供的資料均屬正確無訛且無缺漏，並自願選擇按照本表格轉移權益。
3. I hereby give the eMPF Platform and the trustee(s) indicated in Appendix A an instruction to terminate my relevant personal accounts as referred to in Appendix A upon transfer of the full benefits to my elected scheme and there is no residual balance in the said accounts. 本人謹此指示積金易平台及在附錄 A 中指定的受託人，在把本人於附錄 A 指定的個人帳戶內的所有權益轉移至本人選擇的計劃後，以及在該等帳戶內並無剩餘款項的情況下，終止該等個人帳戶。

Signature of Member [Note 5] 成員簽署 [註 5]	Date 日期
Peter Chan	31 / 10 / 2025 DD 日 / MM 月 / YYYY 年

Form Submission 遞交表格

Transfer Option 轉移選擇	If the elected scheme has got onboard to the eMPF Platform ▲ 如選擇的計劃已轉移至積金易平台 ▲	If the elected scheme has NOT got onboard to the eMPF Platform 如選擇的計劃尚未轉移至積金易平台
Transfer benefits to my elected scheme ▽ 把權益轉移至本人選擇的計劃 ▽	The eMPF Platform 積金易平台	New Trustee 新受託人

▲ For onboarded schemes, please refer to Appendix B: List of "Personal Information Collection Statement" ("PICS") of the eMPF Platform and The Onboarded MPF Schemes. 就有關已轉移的強積金計劃，請參閱附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》(「聲明」)列表。

▽ If you need to submit the form to the eMPF Platform, please refer to the eMPF Platform Submission Channels listed below; if you need to submit the form to the new trustee, please contact the new trustee for submission arrangement. 如你需遞交表格予積金易平台，請參閱下列積金易平台遞交途徑；如你需遞交表格予新受託人，請聯絡新受託人查詢遞交安排。

Submission Channels 遞交途徑

1. Post: PO Box 98929 Tsim Sha Tsui Post Office
   郵寄：尖沙咀郵政局郵政信箱 98929 號
2. Drop-in Box in any one of the eMPF Service Centres below
   下列任何一間積金易服務中心的投遞箱
3. Email address 電郵地址：forms@support.empf.org.hk
4. Fax 傳真：3197 2988

Please do **NOT** submit duplicate copies to avoid duplication.
請勿遞交相同表格，以免重複。

Enquiries 查詢

1. eMPF Customer Service Hotline 積金易客戶服務熱線：183 2622
2. Email address 電郵地址：enquiry@support.empf.org.hk
3. Fax 傳真：3197 2922

eMPF Service Centres Address & Service Hours 積金易服務中心地址及服務時間

Hong Kong Island 香港島	Kowloon 九龍	New Territories 新界
Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong 香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室	Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon 九龍尖沙咀東部麼地道 77 號華懋廣場 12 樓 1205-6 室	Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories 新界荃灣楊屋道 8 號如心廣場第 2 座 18 樓 1802A 室

Service Hours 服務時間：

Monday to Friday	星期一至五	9:00 am – 6:00 pm	上午 9 時 至 下午 6 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

eMPF Customer Service Hotline Service Hours 積金易客戶服務熱線服務時間

Monday to Friday	星期一至五	9:00 am – 7:00 pm	上午 9 時 至 下午 7 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

友邦機密及專利資料。嚴禁分發。

此部分是填寫需整合的賬戶資料(轉出資金)

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APPENDIX A: LIST OF MY PERSONAL ACCOUNTS FOR CONSOLIDATION
附錄 A: 本人選擇整合的個人帳戶列表

Please indicate the personal accounts you elect to consolidate by filling in the Member Account No. [Note 5]
請於下表選出你選擇整合的個人帳戶，並填寫成員帳戶號碼 [註 5]

Trustee Name 受託人名稱	Scheme Name 計劃名稱	Member Account No. 成員帳戶號碼
AIA Company (Trustee) Limited 友邦（信託）有限公司	AIA MPF - Prime Value Choice 友邦強積金優選計劃	
Bank Consortium Trust Company Limited 銀聯信託有限公司	AMTD MPF Scheme AMTD 強積金計劃	
	BCT (MPF) Industry Choice BCT（強積金）行業計劃	
	BCT (MPF) Pro Choice BCT 積金之選	
	BCT Strategic MPF Scheme BCT 強積金策略計劃	
	Manulife RetireChoice (MPF) Scheme 宏利退休精選（強積金）計劃	
Bank of Communications Trustee Limited 交通銀行信託有限公司	BCOM Joyful Retirement MPF Scheme 交通銀行愉盈退休強積金計劃	
Bank of East Asia (Trustees) Limited 東亞銀行（信託）有限公司	BEA (MPF) Industry Scheme 東亞（強積金）行業計劃	
	BEA (MPF) Master Trust Scheme 東亞（強積金）集成信託計劃	
	BEA (MPF) Value Scheme 東亞（強積金）享惠計劃	
BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme 中銀保誠簡易強積金計劃	
	My Choice Mandatory Provident Fund Scheme 我的強積金計劃	
China Life Trustees Limited 中國人壽信託有限公司	China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃	
HSBC Provident Fund Trustee (Hong Kong) Limited	Fidelity Retirement Master Trust 富達退休集成信託	
	Haitong MPF Retirement Fund 海通 MPF 退休金	
	Hang Seng Mandatory Provident Fund - SuperTrust Plus 恒生強積金智選計劃	
	HSBC Mandatory Provident Fund - SuperTrust Plus 滙豐強積金智選計劃	
Manulife Provident Funds Trust Company Limited 宏利公積金信託有限公司	Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃	
Principal Trust Company (Asia) Limited 信安信託（亞洲）有限公司	Principal MPF Scheme Series 800 信安強積金計劃 800 系列	
	Principal MPF – Simple Plan 信安強積金 – 易富之選	
	Principal MPF – Smart Plan 信安強積金 – 明智之選	
Sun Life Trustee Company Limited 永明信託有限公司	Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	
YF Life Trustees Limited 萬通信託有限公司	MASS Mandatory Provident Fund Scheme 萬全強制性公積金計劃	

請確保填寫正確的成員號碼；
你可邀請客戶提供成員結算書作參考或可參照客戶的成員結算書/登入積金易查閱

友邦機密及專利資料。嚴禁分發。

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APPENDIX B: LIST OF "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE ONBOARDED MPF SCHEMES
附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》(「聲明」) 列表

Below are the PICS of the eMPF Platform and the onboarded MPF schemes. Please download and read the PICS of the eMPF Platform and the onboarded MPF scheme(s) via visiting the website of the eMPF Platform or scanning respective QR code. Alternatively, you may also get a copy of the PICS by calling eMPF Customer Service Hotline 183 2622 or visiting any one of the eMPF Service Centres. For MPF scheme(s) which has / have not got onboard, please contact the relevant trustee(s) for the PICS of the relevant scheme(s). 下列為積金易平台及已轉移至積金易平台的強積金計劃的「聲明」。請瀏覽積金易平台的網頁或掃描相關二維碼下載及詳閱積金易平台及已轉移至積金易平台的強積金計劃「聲明」。你亦可致電積金易客戶服務熱線 183 2622 或到訪任何一間積金易服務中心索取「聲明」副本。就尚未轉移至積金易平台的強積金計劃，請聯絡有關受託人索取相關計劃的「聲明」。

Personal Information Collection Statement of The eMPF Platform 積金易平台收集個人資料聲明			Link / QR Code 連結／二維碼
The eMPF Platform 積金易平台			https://empf.org.hk/pics/en
Personal Information Collection Statement of The Onboarded MPF Schemes 已轉移至積金易平台的強積金計劃收集個人資料聲明			
Scheme Name 計劃名稱	**Trustee Name 受託人名稱**	**Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日／月／年)**	**Link / QR Code 連結／二維碼**
AIA MPF - Prime Value Choice 友邦強積金優選計劃	AIA Company (Trustee) Limited 友邦（信託）有限公司	03 / 09 / 2025	https://empf.org.hk/pics_aia
AMTD MPF Scheme AMTD 強積金計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025	https://empf.org.hk/pics_bctad
BCOM Joyful Retirement MPF Scheme 交通銀行愉盈退休強積金計劃	Bank of Communications Trustee Limited 交通銀行信託有限公司	03 / 09 / 2024	https://empf.org.hk/pics_bocom
BCT (MPF) Pro Choice BCT 積金之選	Bank Consortium Trust Company Limited 銀聯信託有限公司	01 / 08 / 2025	https://empf.org.hk/pics_bctpc
BCT Strategic MPF Scheme BCT 強積金策略計劃		03 / 07 / 2025	https://empf.org.hk/pics_bctsg
BEA (MPF) Master Trust Scheme 東亞（強積金）集成信託計劃	Bank of East Asia (Trustees) Limited 東亞銀行（信託）有限公司	05 / 03 / 2025	https://empf.org.hk/pics_beamt
BEA (MPF) Value Scheme 東亞（強積金）享惠計劃		29 / 10 / 2024	https://empf.org.hk/pics_bea
BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme 中銀保誠簡易強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025	https://empf.org.hk/pics_boclec
China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃	China Life Trustees Limited 中國人壽信託有限公司	29 / 07 / 2024	https://empf.org.hk/pics_chinalife
Fidelity Retirement Master Trust 富達退休集成信託	HSBC Provident Fund Trustee (Hong Kong) Limited	30 / 12 / 2025	https://empf.org.hk/pics_hsbcfd
Haitong MPF Retirement Fund 海通 MPF 退休金			https://empf.org.hk/pics_hsbcht
Hang Seng Mandatory Provident Fund - SuperTrust Plus 恒生強積金智選計劃		29 / 01 / 2026	https://empf.org.hk/pics_hsbchs
HSBC Mandatory Provident Fund - SuperTrust Plus 滙豐強積金智選計劃			https://empf.org.hk/pics_hsbchb

友邦機密及專利資料。嚴禁分發。

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Personal Information Collection Statement of The Onboarded MPF Schemes 已轉移至積金易平台的強積金計劃收集個人資料聲明			
Scheme Name 計劃名稱	**Trustee Name 受託人名稱**	**Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日／月／年)**	**Link / QR Code 連結／二維碼**
Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃	Manulife Provident Funds Trust Company Limited 宏利公積金信託有限公司	06 / 11 / 2025	https://empf.org.hk/pics_manl
Manulife RetireChoice (MPF) Scheme 宏利退休精選（強積金）計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025	https://empf.org.hk/pics_bctrc
MASS Mandatory Provident Fund Scheme 萬全強制性公積金計劃	YF Life Trustees Limited 萬通信託有限公司	26 / 06 / 2024	https://empf.org.hk/pics_yflife
My Choice Mandatory Provident Fund Scheme 我的強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025	https://empf.org.hk/pics_bocimc
Principal MPF – Simple Plan 信安強積金－易富之選	Principal Trust Company (Asia) Limited 信安信託（亞洲）有限公司	07 / 05 / 2025	https://empf.org.hk/pics_prinsp
Principal MPF – Smart Plan 信安強積金－明智之選			https://empf.org.hk/pics_prinsm
Principal MPF Scheme Series 800 信安強積金計劃 800 系列			https://empf.org.hk/pics_prins8
SHKP MPF Employer Sponsored Scheme 新地強積金僱主贊辦計劃	Standard Chartered Trustee (Hong Kong) Limited 渣打信託（香港）有限公司	02 / 10 / 2024	https://empf.org.hk/pics_sc
Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	Sun Life Trustee Company Limited 永明信託有限公司	03 / 10 / 2025	https://empf.org.hk/pics_sun

MPF INTERMEDIARY DETAILS 強積金中介人資料 (For MPF Intermediary Use Only 只供強積金中介人填寫)

Intermediary Name 1 中介人名稱 1: Wong Man Kit	Intermediary Name 2 中介人名稱 2:
MPF Registration No. 強積金註冊編號: 123456	MPF Registration No. 強積金註冊編號:
Agent / Broker Code. 經紀／代理人編號: A0001	Agent / Broker Code. 經紀／代理人編號:

!!!重要提示!!!

如使用此積金易表格，需額外提交友邦強積金客戶聲明及同意書至AIA
此申請表格及簽名核實證明文件（SV）則提交至積金易平台

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

EXPLANATORY NOTES 註釋

1. If you do NOT possess a HKID Card, please fill in your name as shown on your passport. 如你沒有香港身份證，請填上你在護照上的姓名。

2. Your request for consolidating personal accounts may not be processed if the name of your elected scheme or your member account no. 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 eMPF Platform / the relevant trustee. 如你沒有提供你選擇的的名稱或成員帳戶號碼，或所提供的資料有誤，你整合個人帳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，請聯絡積金易平台／有關受託人。

   Please note that only the personal accounts you have elected in Appendix A will be consolidated. Those that you have not elected in Appendix A will not be consolidated. 請注意，只有你在附錄 A 中指定的個人帳戶才會整合。附錄 A 內沒有指定的個人帳戶將維持不變。

3. The employer account no. is the number assigned by the eMPF Platform / the trustee to the employer concerned. The number can be found in the statements issued by the eMPF Platform / the trustee or through the member enquiry facilities available from the eMPF Platform / the trustee. Trustee may use different names for this number (e.g. identification no., account number, company code, contract number, employer account no., employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). If you are in doubt, please contact the eMPF Platform, the trustee or your employer. 僱主帳戶號碼是積金易平台／受託人為有關僱主編配的號碼。你可查閱積金易平台／受託人發出的報表或透過積金易平台／受託人提供的成員查詢服務獲取該號碼。受託人或會使用不同名稱來設定此號碼（例如識別號碼、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）。如有疑問，請聯絡積金易平台、受託人或僱主。

4. You may leave the member account no. blank if you have recently enrolled in the scheme and have not been notified of the member account no. If you are in doubt, please contact the eMPF Platform / the new trustee. 如你最近才參加計劃，因而並未獲悉你的成員帳戶號碼，則可留空此項。如有疑問，請聯絡積金易平台／新受託人。

5. Your request for consolidating a particular personal account listed in the Appendix A may not be processed if: 在下列情況下，你要求整合附錄 A 列明的某個個人帳戶的申請可能不獲處理：

   (i) your member account no. of that personal account is not provided or is incorrect; or 你沒有填寫該個人帳戶的成員帳戶號碼，或所填寫的號碼不正確；或

   (ii) the signature in this form does not match the signature specimen previously given to the eMPF Platform / the original trustee. 你在表格上的簽署與你之前給予積金易平台／原受託人的簽署樣式不符。

   However, consolidation will proceed for other personal accounts where the member account no. and signature are correct. 不過，如其他個人帳戶的成員帳戶號碼及簽署樣式均正確，整合該等帳戶的申請將獲處理。

   Your member account no. can be found in your notice of participation or, as the case may be, membership certificate, notice of acceptance, or annual benefit statement issued by the eMPF Platform / the original trustee. If you are in doubt, please contact the eMPF Platform / the original trustee. 你可查閱積金易平台／原受託人發出的參與通知、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成員帳戶號碼。如有疑問，請聯絡積金易平台／原受託人。

GUIDE TO TRANSFER OF MPF ACCRUED BENEFITS ("BENEFITS") BY SCHEME MEMBER
計劃成員轉移強積金累算權益（「權益」）指南

1. This form is to be used for consolidating multiple personal accounts into one account of your election. 本表格適用於整合多個個人帳戶至一個你選擇的帳戶。
2. You must fill in both this form (three pages) and the Appendix A (one page) and submit them (four pages in total) to the eMPF Platform and keep a copy for your future reference. If any information provided, including your signature, is incorrect or incomplete, the eMPF Platform / the trustee may not be able to process your request promptly. 你必須同時填寫本表格（三頁）及附錄 A（一頁），並把表格及附錄 A（合共四頁）遞交予積金易平台，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，積金易平台／受託人可能無法迅速處理你的申請。
3. "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"). 「整合」多個個人帳戶一指從多個強積金個人帳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」）的一個帳戶內。
4. Definition of terms 用詞定義：

   (i) "Contribution account" 「供款帳戶」 – 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. 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）的帳戶，或接收自僱人士所作出的強積金供款的帳戶。

   (ii) "Personal account" 「個人帳戶」 – an account in a scheme which is mainly used to receive the benefits transferred from other contribution or personal account(s). 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。

Reminders Before Consolidating 整合前注意事項

5. Before you decide to transfer your benefits to another scheme, you should take into consideration your personal needs and the following factors: 在你決定把權益轉移至另一個計劃前，你應考慮你的個人需要及以下因素：
   (i) services of the trustees (e.g. frequency of issuance of benefit statement to scheme members; number of free fund switching per year); 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）；
   (ii) fees and charges of the funds (for detailed information, please refer to the website of the MPFA); 基金的收費（詳情請參閱積金局網頁）；
   (iii) the range of fund choices offered by the schemes and in particular whether there are funds available that match what you need; and 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
   (iv) 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. 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。

   Please check the MPF Scheme Brochure and the Key Scheme Information Document ("KSID") of Original Scheme, which can be found on the website of the MPFA or consult the eMPF Platform / the original trustee for details. 有關詳情請查閱原計劃的強積金計劃說明書及主要計劃資料文件，該文件可於積金局的網頁下載，或向積金易平台／原受託人查詢。
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 MPF Scheme Brochure and the KSID of the New Scheme, which can be found on the website of the MPFA or contact the eMPF Platform / the trustee of New Scheme. 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，請查閱新計劃的強積金計劃說明書及主要計劃資料文件，該文件可於積金局的網頁下載，你也可向積金易平台／新計劃的受託人查詢詳情。
7. 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 Appendix A 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 to the eMPF Platform / the new trustee. Please consult the eMPF Platform / the new trustee for the procedures and required documents for setting up an account. 請確保你在你選擇的計劃已開立個人帳戶或供款帳戶，以接收及整合你於附錄 A 所指定擬轉移的個人帳戶內的權益。否則，你在遞交本表格予積金易平台／新受託人之時或在此之前，須先行遞交成員參加計劃表格。有關開立帳戶的程序及所需文件，請向積金易平台／新受託人查詢。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

8. 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 investment mandate of selected MPF account. In the below events, the transferred-in benefits will be invested in the default investment strategy (DIS) if you either: 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，轉入權益將會根據已選擇的強積金帳戶的投資授權進行投資。如就下列情況，轉入權益將會根據預設投資策略進行投資，如你：

   (i) do not give or have not given any investment instructions for the account in the New Scheme to the eMPF Platform / the trustee; or 沒有或尚未就有關新計劃的帳戶向積金易平台／受託人給予任何投資指示；或

   (ii) have given invalid investment instructions for the account in the New Scheme. 就有關新計劃的帳戶給予無效的投資指示。

   Please approach the eMPF Platform / the 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 eMPF Platform / the trustee. 如有需要，請向積金易平台／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，亦請聯絡積金易平台／受託人。

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 eMPF Platform / the trustee 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 contact the eMPF Platform / the trustee if you wish to know the details of how the eMPF Platform / the trustee handles these transactions. 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。如積金易平台／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，積金易平台／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。如欲瞭解積金易平台／受託人如何處理該等交易，請與積金易平台／受託人聯絡。

10. (i) If the accrued benefits is transferred between the member accounts within the **same scheme and same investment class (if applicable)**, such request will be processed: 如轉移累算權益乃於**同一計劃及由相同投資單位類別 (如適用)** 內轉至另一成員帳戶，其轉移將以下列方式進行：

    a. by way of unit transfer for the unitized constituent funds; and 所有單位化的成分基金以轉移單位方式進行轉移；及

    b. by way of transferring account balance for the non-unitized constituent fund(s). 非單位化的成分基金會以轉移帳戶結餘方式進行轉移。

    In short, there is no selling or buying of funds during the transfer process. The latest investment mandate of the member account concerned is not applicable to the accrued benefits being transferred under such transfer arrangement. 概括而言，轉移過程並不涉及任何基金買賣，而相關成員帳戶內的最新投資授權並不適用於此轉移安排下的相關累算權益。

    (ii) If the accrued benefits is transferred between the member accounts 如成員轉移累算權益乃於

    a. with **different investment classes within the same scheme**, or **同一計劃內不同的投資單位類別**進行，或

    b. **across different schemes**, **不同計劃進行**，

    all existing unit holdings in the existing member account will be redeemed. The redemption proceeds will be reinvested in accordance with the latest investment mandate of the chosen member account. 現有成員帳戶內所有持有單位將被贖回，該贖回款項將根據所選擇的成員帳戶的最新投資授權再作投資。

11. 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 eMPF Platform / 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 eMPF Platform / 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. 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。積金易平台／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。積金易平台／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. 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. 你藉本表格整合的每個個人帳戶內的所有權益，**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。

13. **Please DO NOT sign on a blank form.** After the completed form and Appendix A have been received by the eMPF Platform / the trustee, the administration procedures taken by the eMPF Platform / the trustee may not be reversible. **請勿在空白的表格上簽署。**在積金易平台／受託人收到已填妥的表格及附錄 A 後，之前由積金易平台／受託人採取的行政步驟未必能夠撤銷。

14. If any information provided on Form MPF(S)-P(C) (including the signature) is incorrect or incomplete, the eMPF Platform may not be able to process your benefit transfer request. 若你在第 MPF(S)-P(C) 號表格上提供的任何資料 (包括簽署) 不正確或不完整，積金易平台可能無法處理你的權益轉移要求。

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

Enquiries 查詢

16. Information about a scheme is set out in the MPF Scheme Brochure and the KSID of that scheme, which can be found on the website of the MPFA (www.mpfa.org.hk). This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the eMPF Platform for enquiries about account details or contact the relevant trustee(s) via their website(s) / hotline(s) for schemes or funds details. 計劃的強積金計劃說明書及主要計劃資料文件載有該計劃的資料，該文件可於積金局 (www.mpfa.org.hk) 的網頁下載，這些資料將有助你決定是否把權益轉移至該計劃。請透過積金易平台查詢帳戶詳情或透過相關受託人網頁／熱線聯絡受託人以查詢計劃或基金的資料。

17. If you wish to make enquiries or seek assistance in relation to your election to transfer benefit, please contact the eMPF Platform (for the scheme has got onboard to the eMPF Platform) or the trustee(s) (for the scheme has not got onboard to the eMPF Platform). 如欲就你的權益轉移申請作出查詢或尋求協助，請聯絡積金易平台 (計劃已轉移至積金易平台適用) 或受託人 (計劃尚未轉移至積金易平台適用)。

友邦機密及專利資料。嚴禁分發。

填寫轉移申請表格之常見錯誤

文件類型	常見錯誤
成員資金轉移申請表-計劃成員資金轉移申請表、計劃成員整合個人賬戶申請表、僱員自選安排-轉移選擇表格、計劃成員可扣稅自願性供款轉移申請表	• 表格中填寫的資料不完整/不正確 • 轉移表格頁數不完整 • 欠缺計劃編號，欠缺新計劃名稱/受託人名稱 • 原計劃名稱/受託人名稱不正確 • 欠缺原計劃成員帳戶編號 • 欠缺AIA計劃成員帳戶編號 • 聲明部分中的資料不正確/不完整 • 中介人編號~~編號~~不正確 • 中介人名稱不完整

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僱主資金轉移申請表-P(E)範例

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eMPF 積金易

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

eMPF Web Portal 積金易網上平台

Internal use only 內部專用

eMPF Received Date:

P(E)

P(E)

EMPLOYER'S REQUEST FOR FUND TRANSFER FORM [FORM MPF(S) – P(E)]

僱主資金轉移申請表 [第 MPF(S) – P(E) 號表格]

Sections 150 and 150A of the Mandatory Provident Fund Schemes (General) Regulation (Cap. 485A)

《強制性公積金計劃（一般）規例》（第 485A 章）第 150 及 150A 條

Important Notes 重要事項：

1. eMPF Platform Company Limited ("eMPF Company"), a wholly owned subsidiary of the Mandatory Provident Fund Schemes Authority ("MPFA"), will provide the scheme administration services to you through the eMPF Platform, subject to the "General Terms and Conditions of the eMPF Platform" which can be accessed from https://empf.org.hk/tnc/en. This form is only applicable to the new MPF scheme which has got onboard to the eMPF Platform. For details, please refer to the Appendix B: List of "Personal Information Collection Statement" ("PICS") of The eMPF Platform and The Onboarded MPF Schemes. If new MPF scheme has not yet got onboard to the eMPF Platform, please complete the relevant transfer form provided by the new trustee. 積金易平台有限公司（「積金易公司」）是強制性公積金計劃管理局（「積金局」）的全資附屬公司，積金易公司將根據「積金易平台一般條款及細則」（可於 https://empf.org.hk/tnc 瀏覽），透過積金易平台為你提供計劃行政服務。本表格只適用於已轉移至積金易平台的強積金計劃。詳情請參閱附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》（「聲明」）列表。如新強積金計劃尚未轉移至積金易平台，請填寫由新受託人提供的相關轉移表格。

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

2. Please read the Explanatory Notes and Guide to Transfer of MPF Accrued Benefits ("Benefits") By Employer carefully before completing this form. 填寫本表格前，請先細閱註釋及僱主轉移強積金累算權益（「權益」）指南。
3. Please complete this form in BLOCK LETTERS with black or blue pen and tick the appropriate box(es). Please countersign beside any amendment. 請用黑色或藍色筆以正楷填寫本表格，並在適當空格內填上剔號。如有更改，請於更改位置旁加簽。
4. The signature (including countersign) in this form should match with the signature specimen of the original account. 本表格的簽署（包括加簽）必須與原帳戶的簽署樣式相符。
5. The eMPF Platform will process this request upon receipt of this completed form and all relevant supporting document(s) (if any). If there are any omissions (including but not limited to missing page(s) / supporting document(s)), the eMPF Platform may not be able to process this request. 積金易平台收到完整表格及相關證明文件（如有）後，才會處理有關指示。如有遺漏（包括但不限於頁數／證明文件不齊全），積金易平台可能未能執行此指示。
6. Employer information provided in Part B (including correspondence address, name of contact person, mobile phone no. and / or email address) are for reference only and will not be updated to the eMPF Platform. 於 B 部分提供的僱主資料（包括通訊地址、聯絡人姓名、手提電話號碼及／或電郵地址）只作參考用並不會更新至積金易平台。
7. 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 MPFA. 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、有關服務提供者，以及政府或規管機構，包括積金局。
8. The information provided in this form will be used in accordance with the relevant MPF legislation and for the purposes mentioned in the PICS of the eMPF Platform and the Schemes referred / listed in Part B and C below. For details, please refer to the Appendix B. 本表格所有已提供的資料將按照有關強積金法例、積金易平台及下列 B 及 C 部分所指／所列計劃「聲明」處理，詳情請參閱附錄 B。

A. TYPE OF TRANSFER 轉移類別

選擇該公司合適選項

Please indicate your reason of transfer and tick as appropriate. 請於適當方格內填上剔號，表明申請轉移的原

選項1：由另一計劃轉到AIA計劃

☐ Type 1 第 1 類： Scheme transfer to another MPF scheme under the same employer 轉移至同一僱主的另一個強積金計劃

☐ Type 2 第 2 類： Transfer to another / same scheme participated by the new employer 轉移至新僱主參與的另一／同一個強積金計劃
(Please complete the "Intra-group Transfer Form for Transfer of Accrued Benefits upon Intra-group Transfer / Change of Business Ownership)" provided by the eMPF Platform for each employee involved 請就轉移申請所涉及的每名僱員填寫由積金易平台提供的「聯繫公司／更改業務擁有權之成員累算權益轉移表格」。)

選項2：轉移計劃和僱員轉職至"有聯繫公司"

B. DETAILS OF EXISTING EMPLOYER (For Type 1 Transfer) OR NEW EMPLOYER (For Type 2 Transfer)
現任僱主資料（適用於第 1 類轉移）或新僱主資料（適用於第 2 類轉移）

(1) Employer Name [Note 1] 僱主名稱 [附註 1] ABC Company

("the Employer" 「僱主」)

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

(2) Correspondence Address 通訊地址 (Please provide either English OR Chinese Address 請提供英文或中文地址)

Flat / Room 單位／室: 5 Floor 樓數: 9 Block 座: 二座

Building / Estate 大廈／屋苑: 建偉工業大廈

Street (Street No. and Street Name) 街道 (街號及街道名稱): 建偉路183號

District Area 區域: 灣仔

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *: Country * / Region * 國家 * ／地區 *:

Postal code * 郵政編號 *:

* Applicable to address outside Hong Kong only 只適用於香港以外地址

(3) Name of Contact Person 聯絡人姓名: CHAN TAI MAN

(4) Contact Details 聯絡資料

(I) Mobile Phone No. 手提電話號碼: 852 62342345 (Country / Area Code * 國家／地區編號 *)

(II) Daytime Phone No. / Secondary Telephone No. 日間聯絡電話號碼／第二聯絡電話號碼: (Country / Area Code * 國家／地區編號 *)

* If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 如未有提供國家／地區編號，將預設為「香港 (852)」。

(III) Facsimile Number * 傳真號碼 *:

* This is not mandatory to provide facsimile number to the eMPF Platform and the eMPF Platform shall not communicate with your Company via this communication channel. 傳真號碼並非必須提供予積金易平台，積金易平台不會經過此通訊途徑與你公司聯絡。

(IV) Email Address 電郵地址 (If any 如有): chantaiman123@gmail.com

C. TRANSFER INFORMATION 轉移資料

此部分是填寫原計劃的資料 (轉出資金)

(1) Details of the scheme from which benefits [Note 2] are to be transferred 轉出權益 [註 2] 的計劃的資料

(I) Employer Name [Note 3] in the Original Scheme 原計劃的僱主名稱 [註 3]

如僱主名稱與B部分的名稱相同則不用填寫

(II) Name of Original Trustee * 原受託人名稱 *: XXXX(信託)

(III) Name of the Original Scheme * 原計劃名稱 *: XXXX計劃

(IV) Employer Account No. [Note 4] of the Original Scheme 原計劃的僱主賬戶號碼 [註 4]: 12345678

(V) Contributions to original scheme should be paid up to 向原計劃供款的最後日期: 10/10/2025 DD / MM / YYYY 日／月／年

* Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃列表

(2) Do you wish to transfer the benefits [Note 2] of all employees participating in the original scheme? 你是否擬轉移所有參與原計劃的僱員的權益 [註 2]？

(Please tick as appropriate 請於適當方格內填上剔號)

客戶根據其需要✓其中一個選項

☐ (I) Yes 是 (Please choose item (I) or (II) below 請選擇下列項目 (I) 或 (II))

☐ a. Terminate the original scheme after all members' benefits are transferred * 當所有成員權益已轉移後，終止原計劃 *

☐ b. Retain the original scheme after all members' benefits are transferred 當所有成員權益已轉移後，保留原計劃

☐ (II) No 否

PE-25Vs

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(3) Details of the employee(s) whose benefits [Note 2] are to be transferred 將獲安排轉移權益 [註 2] 的僱員的詳細資料

- Employer may provide details of employees, together with authorized signature and company chop, on separate sheets of paper. 僱主可另加紙張提供僱員的詳細資料，請由獲授權簽署人簽署及蓋上公司印章。
- If the benefits to be transferred include voluntary contributions accrued benefits, please complete and return "Voluntary Contributions Application / Change Form" to the eMPF Platform, which can be downloaded from the eMPF Platform's website (https://empf.org.hk/forms/en). Failure in submitting the required documents(s) and set up member class may result in delay in processing the request. 如轉入權益中有自願性供款累算權益，請填寫「自願性供款申請／更改表格」及交回積金易平台，表格可透過積金易平台的網頁 (https://empf.org.hk/forms) 下載。如未能提交所需文件及設立自願性供款成員組別，可能導致延誤處理此指示。

No. 編號	Employee Name 僱員名稱 (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同)	HKID Card / Passport No. [Note 5] of employee 僱員的香港身份證／護照號碼 [註 5]
1	Chan Tai Man	Y 1 2 3 4 5 6 7
2	Employee Name 1	Employee ID No. 1
3	Employee Name 2	Employee ID No. 2
4	Employee Name 3	Employee ID No. 3
5	Employee Name 4	Employee ID No. 4
6	Employee Name 5	Employee ID No. 5
7		
8		
9		
10		
11		
12		

此部分是填寫AIA計劃的資料 (轉入資金)

(4) Details of the scheme to which benefits are to be transferred 轉入權益的計劃的資料：

(i) Name of New Trustee * 新受託人名稱 *
友邦(信託)有限公司

(ii) Name of the New Scheme * 新計劃名稱 *
友邦強積金優選計劃

(iii) Employer Account No. [Note 4] of the New Scheme 新計劃的僱主帳戶號碼 [註 4]
1 2 3 4 5 6 7 8

(iv) Effective Date of Transfer * 轉移開始生效日期 *
3 1 / 1 0 / 2 0 2 5 DD / MM / YYYY 日／月／年

* Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃列表

* The scheme termination effective date will be the effective date of transfer if you / your company terminate the original scheme after transferring members' benefits. 如你／你公司擬於轉移成員權益後終止原計劃，轉移開始生效日將被視為終止計劃生效日。

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D. AUTHORIZATION AND DECLARATION 授權及聲明

By signing this form, the Employer ("I / We") declare that 在簽署本表格，僱主（下稱「本人／我們」）聲明：

1. (i) all personal data of the employee(s) and of the participating employer of the original scheme provided in this form were collected for the purpose(s) mentioned in this form; or 本表格提供的原計劃僱員及參與僱主的全部個人資料，是為達致本表格內所述的目的而收集；或
   (ii) the purpose(s) mentioned in this form is / are purpose(s) directly related to the purpose(s) for which the personal data were to be used at the time of collection of the data; or 本表格內所述的目的是直接與在收集該等個人資料時擬將其使用於的目的有關；或
   (iii) I / we have obtained consent(s) from the employee(s) and from the participating employer of the original scheme for using his / her / their personal data disclosed in this form for the purpose(s) mentioned in this form. 本人／我們已獲得原計劃的僱員及參與僱主的同意，同意為達致本表格內所述的目的而使用他／她／他們於本表格內披露的個人資料。
2. I / We further declare that 此外，本人／我們聲明：
   (i) I / We have read and understood the General Terms and Conditions of the eMPF Platform, the Important Notes, the Explanatory Notes, the Guide to Transfer of MPF Accrued Benefits ("Benefits") by Employer and the PICS of the eMPF Platform and the schemes listed in Part C. 本人／我們已閱讀及明白積金易平台一般條款及細則、重要事項、註釋、僱主轉移強積金累算權益（「權益」）指南及積金易平台及於 C 部分所列計劃「聲明」的內容。
   (ii) I / We, as the participating employer in the original scheme (applicable to Type 1 transfer ONLY), hereby provide notice of my / our intention to cease participating in the original scheme in respect of the employee(s) identified in Part C and the concerned employee(s) has / have been informed of the transfer arrangement. 本人／我們作為原計劃的參與僱主（只適用於第 1 類轉移），特此作出通知，本人／我們有意就 C 部分列出的僱員終止參與原計劃及已通知有關僱員此轉移安排。
   (iii) To the best of my / our knowledge and belief, the information given in this form is correct and complete. 盡本人／我們所知所信，本表格所提供的資料均屬正確無誤且無缺漏。

Authorized Signature(s) with Company Chop (If applicable) [Note 6] 授權簽署及公司印章（如適用）[註 6]	Date 日期
Peter Chan	31 10 2025 DD 日 / MM 月 / YYYY 年

Form Submission 遞交表格

Transfer Option 轉移選擇	If the scheme has got onboard to the eMPF Platform ▲ 如計劃已轉移至積金易平台 ▲	If the scheme has NOT got onboard to the eMPF Platform 如計劃尚未轉移至積金易平台
(i) Intra-group transfer within same scheme ▽ 聯繫公司轉移至相同計劃 ▽	The eMPF Platform 積金易平台	Original Trustee 原受託人
(ii) Intra-group transfer to different scheme ▽ 聯繫公司轉移至不同計劃 ▽	The eMPF Platform 積金易平台 (New Trustee 新受託人)	New Trustee 新受託人
(iii) Scheme transfer ▽ 計劃轉移 ▽	The eMPF Platform 積金易平台 (New Trustee 新受託人)	New Trustee 新受託人

▲ For onboarded schemes, please refer to Appendix B: List of "Personal Information Collection Statement" ("PICS") of The eMPF Platform and The Onboarded MPF Schemes. 就有關已轉移的強積金計劃，請參閱附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》（「聲明」）列表。

▽ If you need to submit the form to the eMPF Platform, please refer to the eMPF Platform Submission Channels listed below; if you need to submit the form to the original / new trustee, please contact the original / new trustee for submission arrangement. 如你需遞交此格予積金易平台，請參閱下列積金易平台遞交途徑；如你需遞交此格予原／新受託人，請聯絡原／新受託人查詢遞交安排。

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Submission Channels 遞交途徑	Enquiries 查詢
1. Post: PO Box 98929 Tsim Sha Tsui Post Office 郵寄：尖沙咀郵政局郵政信箱 98929 號	1. eMPF Customer Service Hotline 積金易客戶服務熱線：183 2622
2. Drop-in Box in any one of the eMPF Service Centres below 下列任何一間積金易服務中心的投遞箱	2. Email address 電郵地址：enquiry@support.empf.org.hk
3. Email address 電郵地址：forms@support.empf.org.hk	3. Fax 傳真：3197 2922
4. Fax 傳真：3197 2988	
Please do NOT submit duplicate copies to avoid duplication. 請勿遞交相同表格，以免重複。	

eMPF Service Centres Address & Service Hours 積金易服務中心地址及服務時間

Hong Kong Island 香港島	Kowloon 九龍	New Territories 新界
Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong 香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室	Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon 九龍尖沙咀東部麼地道 77 號華懋廣場 12 樓 1205-6 室	Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories 新界荃灣楊屋道 8 號如心廣場第 2 座 18 樓 1802A 室

Service Hours 服務時間：

Monday to Friday	星期一至五	9:00 am – 6:00 pm	上午 9 時 至 下午 6 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

eMPF Customer Service Hotline Service Hours 積金易客戶服務熱線服務時間

Monday to Friday	星期一至五	9:00 am – 7:00 pm	上午 9 時 至 下午 7 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

MPF INTERMEDIARY DETAILS 強積金中介人資料 (For MPF Intermediary Use Only 只供強積金中介人填寫)

Intermediary Name 1 中介人名稱 1: Wong Man Kit	Intermediary Name 2 中介人名稱 2:
MPF Registration No. 強積金註冊編號: 123456	MPF Registration No. 強積金註冊編號:
Agent / Broker Code. 經紀／代理人編號: A0001	Agent / Broker Code. 經紀／代理人編號:

EXPLANATORY NOTES 註釋

1. In case of transfer of benefits of employees to the new scheme under a new employer, this refers to the new employer. 如把僱員的權益轉移至新僱主參加的新計劃，則指新僱主。
2. The benefits are confined to the benefits held in the contribution account(s) in the original scheme in respect of the employees of the existing employer. 所指的權益僅限於現任僱主的僱員在原計劃的供款帳戶內的權益。
3. Leave it blank if it is the same as the name of the employer in Part B. 如這個名稱與 B 部分的僱主名稱相同，則無須填寫此項。
4. The employer account no. is the number assigned by the eMPF Platform / the trustee to the employer concerned. The number can be found in the statements issued by the eMPF Platform / the trustee or through the member enquiry facilities available from the eMPF Platform / the trustee. Trustee may use different names for this number (e.g. identification no., account number, company code, contract number, employer account no., employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). If you are in doubt, please contact the eMPF Platform or the relevant trustee. 僱主帳戶號碼是積金易平台／受託人為有關僱主編配的號碼。你可查閱積金易平台／受託人發出的報表或透過積金易平台／受託人提供的成員查詢服務獲取該號碼。受託人或會使用不同名稱來設定此號碼（例如識別號碼、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）。如有疑問，請聯絡積金易平台或有關受託人。
5. If any of the employees do NOT possess a HKID Card, please fill in their passport number and also indicate that it is a passport number. 如僱員沒有香港身份證，請填上他們的護照號碼，並註明其為護照號碼。
6. (i) For transfer of benefits of employee(s) to the scheme of a new employer, this form must be signed by the new employer. 如把僱員的權益轉移至新僱主的計劃，則本表格須由新僱主簽署。
   (ii) If the employer is not a natural person, this form may be signed by the Managing Director, Chief Executive Officer or any person authorized to sign on behalf of the employer. 倘如僱主並不是自然人，本表格可由行政總監、行政總裁或任何獲授權人士代表僱主簽署。

!!!重要提示!!!

如使用此積金易表格，需額外提交友邦強積金客戶聲明及同意書至AIA
此申請表格及簽名核實證明文件（SV）則提交至積金易平台

友邦機密及專利資料。嚴禁分發。

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GUIDE TO TRANSFER OF MPF ACCRUED BENEFITS ("BENEFITS") BY EMPLOYER
僱主轉移強積金累算權益（「權益」）指南

1. Definition of terms 用詞定義：

(i) "Contribution account" 「供款帳戶」	–	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. 「供款帳戶」一指強積金註冊計劃（「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）的帳戶。
(ii) "Original trustee" (also known as "transferor trustee" in the Mandatory Provident Fund Schemes (General) Regulation (the Regulation)) 「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」）	–	the trustee of a scheme from which the benefits of the employees are to be transferred. 指轉出僱員的權益的計劃的受託人。
(iii) "New trustee" (also known as "transferee trustee" in the Regulation) 「新受託人」（在《規例》中亦稱「承轉受託」）	–	the trustee of a scheme to which the benefits of the employees are to be transferred. If you elect to transfer the benefits to another account within the same scheme or to another scheme under the same trustee, the new trustee on Form MPF(S)-P(E) will be the same as the original trustee. 指轉入僱員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帳戶或轉移至同一受託人的另一個計劃，第 MPF(S)-P(E) 號表格所指的新受託人將與原受託人相同。
(iv) "Original scheme" 「原計劃」	–	the scheme from which the benefits of the employees are to be transferred. 指轉出僱員的權益的計劃。
(v) "New scheme" 「新計劃」	–	the scheme to which the benefits of the employees are to be transferred. If you elect to transfer the benefits to another account within the same scheme, the new scheme on Form MPF(S)-P(E) will be the same as the original scheme. 指轉入僱員的權益的計劃。如你選擇把權益轉移至同一計劃的另一個帳戶，第 MPF(S)-P(E) 號表格所指的新計劃將與原計劃相同。

2. Form MPF(S)-P(E) should be used when an employer wishes to transfer the benefits of its employees to another scheme or when a new employer wishes to transfer the benefits of the employees of another employer to the new employer's scheme. The latter case may occur when there is a change of ownership of the business or when the employees are transferred among associated companies. In such case, Form MPF(S)-P(E) should be completed by the new employer. 如僱主擬把僱員的權益轉移至另一個計劃，或新僱主擬把另一名僱主的僱員的權益轉移至本身所參與的計劃，應使用第 MPF(S)-P(E) 號表格。後者的情況或會在業務擁有權有所變更，或僱員在有聯繫公司之間轉調時出現。在該情況下，第 MPF(S)-P(E) 號表格應由新僱主填寫。

3. If the employee members are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that guaranteed fund as requested in Form MPF(S)-P(E) may result in some or all of the guarantee conditions not being satisfied; thus affecting their entitlements to the guarantee. Please check the MPF Scheme Brochure and the Key Scheme Information Document ("KSID") of the original scheme, which can be found on the website of the MPFA or consult the eMPF Platform / the original trustee for details. 對於現時投資於強積金保證基金的僱員而言，如根據第 MPF(S)-P(E) 號表格的要求從該保證基金轉出權益，可能會導致他們不符合部分或所有保證條件，以致影響他們享有保證的資格。有關詳情請查閱原計劃的強積金計劃說明書及主要計劃資料文件，該文件可於積金局的網頁下載，或向積金易平台／原受託人查詢。

4. Please ensure that you have participated and enrolled your employees in the new scheme. Otherwise, you have to enroll your company and your employees in that scheme before you submit Form MPF(S)-P(E) to the eMPF Platform / the new trustee. 請確保你已參加並已安排你的僱員登記參加新計劃。否則，你須先行參加並安排你的僱員登記參加該計劃，然後才向積金易平台／新受託人遞交第 MPF(S)-P(E) 號表格。

5. **Please DO NOT sign on a blank form.** After the completed Form MPF(S)-P(E) has been received by the eMPF Platform / the trustee, the administration procedures taken by the eMPF Platform / the trustee may not be reversible. **請勿在空白的表格上簽署。**在積金易平台／受託人收到已填妥的第 MPF(S)-P(E) 號表格後，之前由積金易平台／受託人採取的行政步驟未必能夠撤銷。

6. If any information provided on Form MPF(S)-P(E) (including the signature) is incorrect or incomplete, the eMPF Platform may not be able to process the benefit transfer request. 若你在第 MPF(S)-P(E) 號表格上提供的任何資料（包括簽署）不正確或不完整，積金易平台可能無法處理此項權益轉移要求。

Enquiries 查詢

7. Information about the new scheme is set out in the MPF Scheme Brochure and the KSID of that scheme, which can be found on the website of the MPFA (www.mpfa.org.hk). This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the eMPF Platform for enquiries about account details or contact the relevant trustee(s) via their website(s) / hotline(s) for the MPF Scheme Brochure and the KSID. 新計劃的強積金計劃說明書及主要計劃資料文件載有該計劃的資料，該文件可於積金局（www.mpfa.org.hk）的網頁下載，這些資料將有助你決定是否把權益轉移至該計劃。請透過積金易平台查詢帳戶詳情或透過相關受託人網站／熱線聯絡受託人以查詢強積金計劃說明書及主要計劃資料文件。

8. If you wish to make enquiries or seek assistance in relation to your election to transfer benefit, please contact the eMPF Platform (for the scheme has got onboard to the eMPF Platform) or the trustee(s) (for the scheme has not got onboard to the eMPF Platform). 如欲就你的權益轉移申請作出查詢或尋求協助，請聯絡積金易平台（計劃已轉移至積金易平台適用）或受託人（計劃尚未轉移至積金易平台適用）。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

APPENDIX A: LIST OF MPF SCHEMES 附錄 A: 強積金計劃列表

Scheme Name 計劃名稱	Trustee Name 受託人名稱	Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日 / 月 / 年)
AIA MPF - Prime Value Choice 友邦強積金優選計劃	AIA Company (Trustee) Limited 友邦（信託）有限公司	03 / 09 / 2025
AMTD MPF Scheme AMTD 強積金計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025
BCOM Joyful Retirement MPF Scheme 交通銀行愉盈退休強積金計劃	Bank of Communications Trustee Limited 交通銀行信託有限公司	03 / 09 / 2024
BCT (MPF) Industry Choice BCT（強積金）行業計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	Details to be announced 詳情稍後公佈
BCT (MPF) Pro Choice BCT 積金之選		01 / 08 / 2025
BCT Strategic MPF Scheme BCT 強積金策略計劃		03 / 07 / 2025
BEA (MPF) Industry Scheme 東亞（強積金）行業計劃	Bank of East Asia (Trustees) Limited 東亞銀行（信託）有限公司	Details to be announced 詳情稍後公佈
BEA (MPF) Master Trust Scheme 東亞（強積金）集成信託計劃		05 / 03 / 2025
BEA (MPF) Value Scheme 東亞（強積金）享惠計劃		29 / 10 / 2024
BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme 中銀保誠簡易強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025
China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃	China Life Trustees Limited 中國人壽信託有限公司	29 / 07 / 2024
Fidelity Retirement Master Trust 富達退休集成信託	HSBC Provident Fund Trustee (Hong Kong) Limited	30 / 12 / 2025
Haitong MPF Retirement Fund 海通 MPF 退休金		
Hang Seng Mandatory Provident Fund - SuperTrust Plus 恒生強積金智選計劃		29 / 01 / 2026
HSBC Mandatory Provident Fund - SuperTrust Plus 滙豐強積金智選計劃		
Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃	Manulife Provident Funds Trust Company Limited 宏利公積金信託有限公司	06 / 11 / 2025
Manulife RetireChoice (MPF) Scheme 宏利退休精選（強積金）計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025
MASS Mandatory Provident Fund Scheme 萬全強制性公積金計劃	YF Life Trustees Limited 萬通信託有限公司	26 / 06 / 2024
My Choice Mandatory Provident Fund Scheme 我的強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025
Principal MPF – Simple Plan 信安強積金 – 易富之選	Principal Trust Company (Asia) Limited 信安信託（亞洲）有限公司	07 / 05 / 2025
Principal MPF – Smart Plan 信安強積金 – 明智之選		
Principal MPF Scheme Series 800 信安強積金計劃 800 系列		
SHKP MPF Employer Sponsored Scheme 新地強積金僱主贊辦計劃	Standard Chartered Trustee (Hong Kong) Limited 渣打信託（香港）有限公司	02 / 10 / 2024
Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	Sun Life Trustee Company Limited 永明信託有限公司	03 / 10 / 2025

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

APPENDIX B: LIST OF "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE ONBOARDED MPF SCHEMES
附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》(「聲明」) 列表

Below are the PICS of the eMPF Platform and the onboarded MPF schemes. Please download and read the PICS of the eMPF Platform and the onboarded MPF scheme(s) via visiting the website of the eMPF Platform or scanning respective QR code. Alternatively, you may also get a copy of the PICS by calling eMPF Customer Service Hotline 183 2622 or visiting any one of the eMPF Service Centres. For MPF scheme(s) which has / have not got onboard, please contact the relevant trustee(s) for the PICS of the relevant scheme(s). 下列為積金易平台及已轉移至積金易平台的強積金計劃的「聲明」。請瀏覽積金易平台的網頁或掃描相關二維碼下載及詳閱積金易平台及已轉移至積金易平台的強積金計劃「聲明」。你亦可致電積金易客戶服務熱線 183 2622 或到訪任何一間積金易服務中心索取「聲明」副本。就尚未轉移至積金易平台的強積金計劃，請聯絡有關受託人索取相關計劃的「聲明」。

Personal Information Collection Statement of The eMPF Platform 積金易平台收集個人資料聲明			Link / QR Code 連結 / 二維碼
The eMPF Platform 積金易平台			https://empf.org.hk/pics/en
Personal Information Collection Statement of The Onboarded MPF Schemes 已轉移至積金易平台的強積金計劃收集個人資料聲明			
Scheme Name 計劃名稱	**Trustee Name 受託人名稱**	**Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日 / 月 / 年)**	**Link / QR Code 連結 / 二維碼**
AIA MPF - Prime Value Choice 友邦強積金優選計劃	AIA Company (Trustee) Limited 友邦 (信託) 有限公司	03 / 09 / 2025	https://empf.org.hk/pics_aia
AMTD MPF Scheme AMTD 強積金計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025	https://empf.org.hk/pics_bcbad
BCOM Joyful Retirement MPF Scheme 交通銀行愉盈退休強積金計劃	Bank of Communications Trustee Limited 交通銀行信託有限公司	03 / 09 / 2024	https://empf.org.hk/pics_bocom
BCT (MPF) Pro Choice BCT 積金之選	Bank Consortium Trust Company Limited 銀聯信託有限公司	01 / 08 / 2025	https://empf.org.hk/pics_bctpc
BCT Strategic MPF Scheme BCT 強積金策略計劃		03 / 07 / 2025	https://empf.org.hk/pics_bctsg
BEA (MPF) Master Trust Scheme 東亞 (強積金) 集成信託計劃	Bank of East Asia (Trustees) Limited 東亞銀行 (信託) 有限公司	05 / 03 / 2025	https://empf.org.hk/pics_beamt
BEA (MPF) Value Scheme 東亞 (強積金) 享惠計劃		29 / 10 / 2024	https://empf.org.hk/pics_bea
BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme 中銀保誠簡易強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025	https://empf.org.hk/pics_bocipc
China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃	China Life Trustees Limited 中國人壽信託有限公司	29 / 07 / 2024	https://empf.org.hk/pics_chinalife
Fidelity Retirement Master Trust 富達退休集成信託	HSBC Provident Fund Trustee (Hong Kong) Limited	30 / 12 / 2025	https://empf.org.hk/pics_hsbcfd
Haitong MPF Retirement Fund 海通 MPF 退休金			https://empf.org.hk/pics_hsbcht
Hang Seng Mandatory Provident Fund - SuperTrust Plus 恒生強積金智選計劃		29 / 01 / 2026	https://empf.org.hk/pics_hsbchs
HSBC Mandatory Provident Fund - SuperTrust Plus 滙豐強積金智選計劃			https://empf.org.hk/pics_hsbchb

友邦機密及專利資料。嚴禁分發。

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Personal Information Collection Statement of The Onboarded MPF Schemes 已轉移至積金易平台的強積金計劃收集個人資料聲明			
Scheme Name 計劃名稱	**Trustee Name 受託人名稱**	**Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日／月／年)**	**Link / QR Code 連結／二維碼**
Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃	Manulife Provident Funds Trust Company Limited 宏利公積金信託有限公司	06 / 11 / 2025	https://empf.org.hk/pics_manl
Manulife RetireChoice (MPF) Scheme 宏利退休精選（強積金）計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025	https://empf.org.hk/pics_bctrc
MASS Mandatory Provident Fund Scheme 萬全強制性公積金計劃	YF Life Trustees Limited 萬通信託有限公司	26 / 06 / 2024	https://empf.org.hk/pics_yflife
My Choice Mandatory Provident Fund Scheme 我的強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025	https://empf.org.hk/pics_bocimc
Principal MPF – Simple Plan 信安強積金 – 易富之選	Principal Trust Company (Asia) Limited 信安信託（亞洲）有限公司	07 / 05 / 2025	https://empf.org.hk/pics_prinsp
Principal MPF – Smart Plan 信安強積金 – 明智之選			https://empf.org.hk/pics_prinsm
Principal MPF Scheme Series 800 信安強積金計劃 800 系列			https://empf.org.hk/pics_prins8
SHKP MPF Employer Sponsored Scheme 新地強積金僱主贊辦計劃	Standard Chartered Trustee (Hong Kong) Limited 渣打信託（香港）有限公司	02 / 10 / 2024	https://empf.org.hk/pics_sc
Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	Sun Life Trustee Company Limited 永明信託有限公司	03 / 10 / 2025	https://empf.org.hk/pics_sun

友邦機密及專利資料。嚴禁分發。

填寫僱主資金轉移申請表格的應用情境及例子

什麼情況需要填寫「僱主資金轉移申請表」？

當僱員在**同一企業集團內轉職至另一間聯繫公司(新僱主)**，並且需要將其累算權益（MPF）由**原計劃轉移至新僱主的計劃**時，必須由**新僱主填寫此表格**。這類情況通常包括：

1. **公司業務重組或收購**：原僱主計劃終止，僱員轉至新公司，並保留服務年資。
2. **僱員在集團內調職**：例如從「A公司」轉至「B公司」，兩者屬同一集團，但商業登記號碼不同。
3. **新僱主需要承接原僱員的累算權益**，並將資金轉入新僱主的計劃。

intra-group transfer 例子

情境：

- 僱員原本在「AAA 」工作，參加「XXX計劃」。
- 因集團內部調整，僱員轉職至「BBB」，該公司有自己的 MPF 計劃。
- 兩家公司屬同一集團，但商業登記號碼不同，因此屬 intra-group transfer 。

觸發條件：

- 僱員的服務年資需要累積至新公司計算。
- 僱員的 MPF 權益需從原計劃轉移至新計劃。
- 新僱主必須填寫 **僱主資金轉移申請表**，並提交給新受託人（例如 AIA）。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

計劃成員資金轉移申請表 P(M)範例

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

(3) Contact Details 聯絡資料

(i) Mobile Phone No. 手提電話號碼: 852 (Country / Area Code * 國家／地區編號*) 62342345

(ii) Daytime Phone No. / Secondary Telephone No. 日間聯絡電話號碼／第二聯絡電話號碼: (Country / Area Code * 國家／地區編號*)

* SMS (if applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊 (如適用) 只發送至香港手提電話號碼。如未有提供國家／地區編號，將預設為「香港 (852)」。

(iii) Email Address 電郵地址 (If any 如有): chantaiman123@gmail.com

(4) Correspondence Address 通訊地址 (Please provide either English OR Chinese address 請提供英文或中文地址)

Flat / Room 單位／室: C

Floor 樓數: 30

Block 座: 2

Building / Estate 大廈／屋苑: 開心大廈

Street (Street No. and Street Name) 街道 (街號及街道名稱): 開心路10號

District Area 區域: 上環

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *:

Country * / Region * 國家 * ／地區 *:

Postal code * 郵政編號 *:

* Applicable to address outside Hong Kong only 只適用於香港以外地址

B. TRANSFER INFORMATION 轉移資料

此部分是填寫原計劃的資料 (轉出資金)

(1) MPF account details in the original scheme 原計劃的強積金帳戶資料

Name of Original Trustee Note 2 & ^ 原受託人名稱 註 2 & ^: XXXX(信託)

Name of Original Scheme Note 2 & ^ 原計劃名稱 註 2 & ^: XXXX計劃

Type of MPF account Note 2 強積金帳戶類別 註 2 (Please select ONE of the following accounts and tick as appropriate 請選擇以下其中一個帳戶，並於適當方格內填上剔號)

☐ Personal Account 個人帳戶 OR 或 ☐ Contribution Account 供款帳戶

客戶根據其需要✓其中一個選項

Member Account No. Note 2 成員帳戶號碼 註 2: 12345678

如漏填成員賬戶編號會無法轉移
可參照客戶的成員結算書/登入積金易查閱

^ Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃

(2) Former employment details 以往受僱資料 (Applicable for empl... after cessation of employment 適用於僱員在終止受僱後欲把供款帳戶內的權益轉出)

Name of Former Employer Note 2 前任僱主名稱 註 2: EXXXX 公司

Employer Account No. Note 2 & 3 僱主帳戶號碼 註 2 及 3: 12345678

適用於(1) ☑ 供款賬戶

適用於自僱人士

(3) Self-employed status details 自僱人士身分詳情 (Applicable for self-employed person only 只適用於...

Please indicate your reason of transfer and tick as appropriate. 請於適當方格內填上剔號，表明申請轉移的原因。

☐ Cessation of self-employment, with effect from 終止自僱，生效日期是 ___/___/_____ DD / MM / YYYY 日／月／年

☐ I will remain in self-employment and my benefits will be transferred to another scheme stated in Part C. Contributions to the original scheme should be paid up to 本人將會繼續自僱，並把本人的權益轉移至第 C 部分所述的另一個計劃。本人向原計劃供款的最後日期是 ___/___/_____ DD / MM / YYYY 日／月／年

客戶根據其需要✓其中一個選項

例子說明:
1) 如客戶終止自僱人士賬戶及需要轉移該賬戶權益到AIA個人帳戶→ 填寫終止自僱日期及填寫C(1)(ii)部分

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

C. TRANSFER OPTIONS 轉移選項

此部分是填寫AIA計劃的資料 (轉入資金)

(1) **Mandatory contributions 強制性供款** (MPF account information in the new scheme 新計劃的強積金帳戶資料)

I elect to trans... 遮帳戶內由強... 上剔號。)

例子1：新僱主開立的供款戶口 ， 此部分適用於由其他賬戶轉移到AIA 「*供款賬戶*」，作用是整合以往個人賬戶累積資產到客人現職公司，而客人現職僱主也是用 AIA 的 。

☑ (i) To my contribution account with my new employer 轉移至本人新僱主為本人開立的供款帳戶

Name of New Trustee Note 4 & ^ 新受託人名稱 註 4 及 ^ : 友邦(信託)有限公司

Name of New Scheme Note 4 & ^ 新計劃名稱 註 4 及 ^ : 友邦強積金優選計劃

Member Account No. Note 4 成員帳戶號碼 註 4 : 1 2 3 4 5 6 7 8

Name of New Employer 新僱主名稱 : ABC公司

Employer Account No. Note 3 僱主帳戶號碼 註 3 : 1 2 3 4 5 6 7 8

大多數情況底下會 ☑ (ii) 例子2：新開的AIA個人帳戶，用作開立另一個全新的「*個人賬戶*」去承接以往個人賬戶累積資產，適用於其他賬戶轉移至AIA

☑ (ii) To my designated account in the new scheme 轉移至本人新計劃內的指定帳戶

Name of New Trustee Note 4 & ^ 新受託人名稱 註 4 及 ^ : 友邦(信託)有限公司

Name of New Scheme Note 4 & ^ 新計劃名稱 註 4 及 ^ : 友邦強積金優選計劃

Member Account No. Note 4 成員帳戶號碼 註 4 : 1 2 3 4 5 6 7 8

* Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃列表

☐ (iii) Retained in the original scheme as personal account Note 5 以個人帳戶形式保留在原計劃 註 5 (where applicable 如適用)

(2) **Voluntary contributions Note 6 (if any) in my account stated in Part B(1)** 有關本人在 B(1) 部分所述帳戶內的自願性供款 註 6 (如有) (Please select option (I) OR (II) and tick as appropriate. 請選擇 (I) 或 (II)，並於適當方格內填上剔號。)

如在B(1)有自願性供款則需剔選以下其中方格

Remarks 備註 :

(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 Part C(1). If there are no such benefits in your account and you have made an election in this part, the selected option will not be processed. 如你沒有作出任何選擇，而帳戶內有由自願性供款所產生的權益，則該等權益將以處理第 C(1) 部分所述權益的同樣方式處理。如你已在本部作出選擇，而帳戶內並沒有該等權益，則有關選擇將不會獲處理。)

☐ (I) Transferred together with the benefits derived from the mandatory contributions as in Part C(1)
與在第 C(1) 部分所述由強制性供款所產生的權益一併轉移

☐ (II) Withdrawn in accordance with the governing rules of the original scheme
按照原計劃的管限規則提取權益

必須清楚填寫帳戶號碼 （包括AIA的帳戶號碼）

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

只適用於選擇了C2 (ii) 提取權益的客戶

Method of payment 付款方式

Please choose one option below only and provide the relevant information (if applicable). If no option is chosen, method of payment will be defaulted as by "Cheque" without prior notice. 請只揀選下列其中一項及提供相關資料 (如適用)。如沒有就付款方式作出選擇，付款方式將預設為「支票」及不作另行通知。

☐ (1) Cheque 支票

- The cheque will be issued in HK dollars and sent to member's correspondence address. Please ensure the contact details in MPF account are up-to-date. Member may update the contact details via eMPF Member Portal or "Member Information Change Form". Please allow sufficient time for the eMPF Platform to update member's record. 支票將以港幣印發及郵寄至成員的通訊地址。請確保強積金帳戶內的聯絡資料均為最新及準確。成員可透過積金易成員平台或「成員更改資料表格」更新聯絡資料。請預留足夠時間以便積金易平台更新成員的紀錄。

☐ (2) Depositing directly in a bank account under the sole name of scheme member only 直接存入只以計劃成員名義開立的銀行戶口

- This option is available only if the trustee provides such services. If the Member chooses this option but the trustee does not provide such services (such as deposit to a specific bank or overseas / other places bank), method of payment will be defaulted as by "Cheque". 此選項只適用於有提供此項服務的受託人。如成員選擇此選項而受託人並無提供該項服務 (例如存入至指定銀行或海外／其他地方銀行)，付款方法將預設為「支票」。
- If the Member chooses to have the payment (including but not limited to subsequent payment) to be paid to his / her local bank or overseas / other places bank account directly, bank charges may apply to the Member's bank account. 如成員選擇將款項 (包括但不限於隨後的款項) 直接匯入他／她的本地銀行或海外／其他地方銀行戶口，則該銀行可透過成員的銀行戶口收取銀行手續費。
- The payment made to local bank will be deposited in HK dollars only. 存入本地銀行的款項，將以港幣支付。
- Please contact trustee for details. 請聯絡受託人查詢詳情。

Name of Bank Account Holder^ 銀行戶口持有人姓名 ^: **CHAN TAI MAN**

^ A bank account under the name of a third party or joint bank account is not applicable 不適用於第三者名義或聯名銀行戶口

Name of Bank 銀行名稱: **Hong Kong Bank**

Bank No. ▼ 銀行編號 ▼	Branch No. ▼ 分行號碼 ▼	Account No. (Please specify account suffix no. for integrated account.) 戶口號碼 (如戶口屬於綜合理財戶口，請註明戶口字尾號碼。)
000	001	2345678

▼ Not applicable for overseas / other places bank 不適用於海外／其他地方銀行

For overseas / other places bank only 只適用於海外／其他地方銀行：

Currency 貨幣:

Overseas / Other Places Bank Address 海外／其他地方銀行地址:

Country / Region 國家／地區

Overseas / Other Places Bank Swift Code 海外／其他地方銀行 Swift 代碼:

Intermediary Bank Name 中介銀行名稱: (If applicable 如適用)

Intermediary Bank Swift Code 中介銀行 Swift 代碼: (If applicable 如適用)

Other Settlement Information (e.g. IBAN) 其他結算資料 (例如國際銀行帳戶號碼): (If applicable 如適用)

Others (e.g. Member's overseas address / phone no.) 其他 (例如成員海外地址／電話號碼): (If applicable 如適用)

D. TERMINATION OF MPF ACCOUNT WITH NO RESIDUAL BALANCE 終止沒有結餘的強積金帳戶 (If Applicable 如適用)

I hereby give the original trustee an instruction to terminate my relevant MPF member account as referred to in Part B(1) upon transfer of the full benefits to the new trustee and there is no residual balance in the said account. 本人謹此指示原受託人，在把本人於 B(1) 部分所述的強積金成員帳戶內的所有權益轉移至新受託人後，以及在該帳戶內並無剩餘款項的情況下，終止該強積金成員帳戶。

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

E. AUTHORIZATION AND DECLARATION 授權及聲明

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

1. I hereby give consent to the trustee of my elected scheme, the eMPF Platform and 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. 本人同意，本人選擇的計劃的受託人，積金易平台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。
2. I have read and understood the General Terms and Conditions of the eMPF Platform, the Important Notes, the Explanatory Notes, the Guide to Transfer of MPF Accrued Benefits ("Benefits") by Scheme Member and the PICS of the eMPF Platform and the Schemes listed in Part B and C, and have voluntarily elected to transfer / retain my benefits in accordance with this form. 本人已閱讀及明白積金易平台一般條款及細則、重要事項、註釋、計劃成員轉移強積金累算權益 (「權益」) 指南及積金易平台及於 B 及 C 部分所列計劃「聲明」的內容，並自願選擇按照本表格轉移／保留權益。
3. To the best of my knowledge and belief, the information given in this form is correct and complete. 盡本人所知所信，本表格所提供的資料均屬正確無誤且無缺漏。
4. I acknowledge that there may be bank charges incurred in relation to deposit payment to my local bank or overseas / other places bank account. I agree and confirm to deduct the bank charges from my bank account (if any) associated with local bank or overseas / other places bank deposited. I understand that the payment amount accrued will be impacted by exchange rate (if applicable). 本人確認獲悉於本地銀行或海外／其他地方銀行戶口存款可能會衍生銀行收費。本人同意並確認於本人銀行戶口扣除因本地銀行或海外／其他地方銀行存款相關的收費 (如有)。本人明白累算權益金額將受匯率影響 (如適用)。

Signature of Member [Note 7] 成員簽署 [# 7]	Date 日期
Peter Chan	31 / 10 / 2025 DD 日 / MM 月 / YYYY 年

Form Submission 遞交表格

Transfer Option 轉移選擇	If the scheme has got onboard to the eMPF Platform ▲ 如計劃已轉移至積金易平台 ▲	If the scheme has NOT got onboard to the eMPF Platform 如計劃尚未轉移至積金易平台
(i) Retain benefits in the original scheme ▽ 把權益保留在原計劃 ▽	The eMPF Platform 積金易平台	Original Trustee 原受託人
(ii) Transfer benefits to the new scheme ▽ 把權益轉移至新計劃 ▽		New Trustee 新受託人

▲ For onboarded schemes, please refer to Appendix B: List of "Personal Information Collection Statement" ("PICS") of The eMPF Platform and The Onboarded MPF Schemes. 就有關已轉移的強積金計劃，請參閱附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》(「聲明」) 列表。

▽ If you need to submit the form to the eMPF Platform, please refer to the eMPF Platform Submission Channels listed below; if you need to submit the form to the original / new trustee, please contact the original / new trustee for submission arrangement. 如你需遞交此表格予積金易平台，請參閱下列積金易平台遞交途徑；如你需遞交此表格予原／新受託人，請聯絡原／新受託人查詢遞交安排。

Submission Channels 遞交途徑

1. Post: PO Box 98929 Tsim Sha Tsui Post Office
   郵寄：尖沙咀郵政局郵政信箱 98929 號
2. Drop-in Box in any one of the eMPF Service Centres below
   下列任何一間積金易服務中心的投遞箱
3. Email address 電郵地址 : forms@support.empf.org.hk
4. Fax 傳真 : 3197 2988

Please do **NOT** submit duplicate copies to avoid duplication.
請勿遞交相同表格，以免重複。

Enquiries 查詢

1. eMPF Customer Service Hotline 積金易客戶服務熱線 : 183 2622
2. Email address 電郵地址 : enquiry@support.empf.org.hk
3. Fax 傳真 : 3197 2922

eMPF Service Centres Address & Service Hours 積金易服務中心地址及服務時間

Hong Kong Island 香港島	Kowloon 九龍	New Territories 新界
Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong 香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室	Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon 九龍尖沙咀東部麼地道 77 號華懋廣場 12 樓 1205-6 室	Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories 新界荃灣楊屋道 8 號如心廣場第 2 座 18 樓 1802A 室

Service Hours 服務時間 :

Monday to Friday	星期一至五	9:00 am – 6:00 pm	上午 9 時至下午 6 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時至下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

eMPF Customer Service Hotline Service Hours 積金易客戶服務熱線服務時間

Monday to Friday	星期一至五	9:00 am – 7:00 pm	上午 9 時至下午 7 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時至下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

MPF INTERMEDIARY DETAILS 強積金中介人資料 (For MPF Intermediary Use Only 只供強積金中介人填寫)

Intermediary Name 1 中介人名稱 1 Wong Man Kit	Intermediary Name 2 中介人名稱 2
MPF Registration No. 強積金註冊編號 123456	MPF Registration No. 強積金註冊編號
Agent / Broker Code. 經紀／代理人編號 A0001	Agent / Broker Code. 經紀／代理人編號

EXPLANATORY NOTES 註釋

1. If you do NOT possess a HKID Card, please fill in your name as shown on your passport. 如你沒有香港身份證，請填上你在護照上的姓名。
2. The transfer request may not be processed if the name of the original trustee, scheme name, your member account no. in the original scheme, type of MPF account, the name of your former employer or the employer account no. is not provided or is incorrect. This information can be found: 如你沒有提供原受託人名稱、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帳戶號碼，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：
   (i) in your membership certificate, notice of acceptance, or notice of participation issued by the eMPF Platform / the original trustee; or 查閱由積金易平台／原受託人發出的成員證明書、接納通知或參與通知；或
   (ii) in your annual benefit statement, or other statements provided by the eMPF Platform / the original trustee; or 查閱由積金易平台／原受託人提供的周年權益報表或其他報表；或
   (iii) through the member enquiry facilities available from the eMPF Platform / the original trustee. 積金易平台／原受託人提供的成員查詢服務。

   If you are in doubt, please contact the eMPF Platform, the original trustee or your former employer. 如有疑問，請聯絡積金易平台、原受託人或前任僱主。
3. The employer account no. is the number assigned by the eMPF Platform / the trustee to the employer concerned. The number can be found in the statements issued by the eMPF Platform / the trustee or through the member enquiry facilities available from the eMPF Platform / the trustee. Trustees may use different names for this number (e.g. identification no., account number, company code, contract number, employer account no., employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). If you are in doubt, please contact the eMPF Platform, the trustee or your employer. 僱主帳戶號碼即積金易平台／受託人為有關僱主編配的號碼。你可查閱積金易平台／受託人發出的報表或透過積金易平台／受託人提供的成員查詢服務獲取該號碼。受託人或會使用不同名稱來設定此號碼（例如識別號碼、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）。如有疑問，請聯絡積金易平台、受託人或僱主。
4. The transfer request may not be processed if the name of the new trustee, the scheme name of the new scheme or your member account no. in the new scheme is not provided or is incorrect. The information can be found: 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：
   (i) in your membership certificate, notice of acceptance, or notice of participation issued by the eMPF Platform / the new trustee; or 查閱由積金易平台／新受託人發出的成員證明書、接納通知或參與通知；或
   (ii) in your annual benefit statement, or other statements provided by the eMPF Platform / the new trustee; or 查閱周年權益報表或積金易平台／新受託人提供的其他報表；或
   (iii) through the member enquiry facilities available from the eMPF Platform / the new trustee. 積金易平台／新受託人提供的成員查詢服務。

   You may, however, leave the member account no. 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 the eMPF Platform / the new trustee. 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，請聯絡積金易平台／新受託人。
5. For the retained arrangement: 有關保留詳情：
   (i) If the Member has more than one personal account in the original scheme, the accrued benefits will be retained to a personal account with the most recent date of joining the scheme. If you are in doubt, please contact the eMPF Platform / the relevant trustee(s). 如成員於原計劃擁有多於一個個人帳戶，累算權益將保留於最近的參加計劃日期的個人帳戶。如有疑問，請聯絡積金易平台／相關受託人。
   (ii) For SHKP MPF Employer Sponsored Scheme, it will be retained in the designated MPF scheme as Personal Account. For details, please refer to its MPF Scheme Brochure. Please submit this form to the eMPF Platform. (Applicable only after SHKP MPF Employer Sponsored Scheme has got onboard to the eMPF Platform) 就新地強積金僱主贊助計劃，保留在原計劃即以個人帳戶形式保留於指定的強積金計劃。詳情請參閱其強積金計劃說明書。請將本表格交予積金易平台。(只適用於新地強積金僱主贊助計劃已轉移至積金易平台)
6. A scheme member can check whether his / her existing MPF account contains any benefits derived from voluntary contributions from his / her annual benefit statement issued by the eMPF Platform / the original trustee to the scheme member. The scheme member can also check this information through the eMPF Member Portal or other member enquiry facilities available from the eMPF Platform / the original trustee. If you are in doubt, please contact the eMPF Platform / the original trustee. 計劃成員可在積金易平台／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。計劃成員亦可透過積金易成員平台或其他積金易平台／原受託人提供的成員查詢服務查核這項資料。如有疑問，請聯絡積金易平台／原受託人。
7. The signature must be the same as your signature specimen previously given to the eMPF Platform / the original trustee. Please note that the transfer and / or the voluntary contribution withdrawal request may not be processed if the signature provided in this form does not match your signature specimen previously given to the eMPF Platform / the original trustee. If you are in doubt, please contact the eMPF Platform / the original trustee. 你的簽署必須與你之前給予積金易平台／原受託人的簽署樣式相符。請注意，若本表格上的簽署與你之前給予積金易平台／原受託人的簽署樣式不符，有關轉移及／或自願性供款提取申請或不獲處理。如有疑問，請聯絡積金易平台／原受託人。

!!!重要提示!!!

如使用此積金易表格，需額外提交友邦強積金客戶聲明及同意書至AIA
此申請表格及簽名核實證明文件（SV）則提交至積金易平台

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

GUIDE TO TRANSFER OF MPF ACCRUED BENEFITS ("BENEFITS") BY SCHEME MEMBER
計劃成員轉移強積金累算權益(「權益」)指南

(For self-employed person, personal account holder or employee ceasing employment 適用於自僱人士、個人帳戶持有人或終止受僱的僱員)

1. Definition of terms 用詞定義:

(i) "Contribution account" 「供款帳戶」 – 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.
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帳戶。

(ii) "Personal account" 「個人帳戶」 – an account in a scheme which is mainly used to receive the benefits transferred from another contribution or personal account.
指計劃下主要用以接收由另一供款或個人帳戶轉入的權益的帳戶。

(iii) "Original trustee" (also known as "transferor trustee" in the Mandatory Provident Fund Schemes (General) Regulation (the Regulation)) 「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」) – the trustee of a scheme from which your benefits are to be transferred.
指轉出你的權益的計劃的受託人。

(iv) "New trustee" (also known as "transferee trustee" in the Regulation) 「新受託人」(在《規例》中亦稱「承轉受託人」) – 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.
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帳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。

(v) "Original scheme" 「原計劃」 – the scheme from which your benefits are to be transferred.
指轉出你的權益的計劃。

(vi) "New scheme" 「新計劃」 – 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.
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,第 MPF(S)-P(M) 號表格所指的新計劃將與原計劃相同。

Reminders before making an election to transfer 作出轉移選擇前的注意事項

2. Before you decide to transfer your benefits to another scheme, you should take into consideration your personal needs and the following factors: 在你決定把權益轉移至另一個計劃前,你應考慮你的個人需要及以下因素:

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

(ii) fees and charges of the funds (for detailed information, please refer to the website of the MPFA); 基金的收費(詳情請參閱積金局網頁);

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

(iv) 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. 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。

Please check the MPF Scheme Brochure and the Key Scheme Information Document ("KSID") of Original Scheme, which can be found on the website of the MPFA or consult the eMPF Platform / the original trustee for details. 有關詳情請查閱原計劃的強積金計劃說明書及主要計劃資料文件,該文件可於積金局的網頁下載,或向積金易平台/原受託人查詢。

3. 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 MPF Scheme Brochure and the KSID of the New Scheme, which can be found on the website of the MPFA or contact the eMPF Platform / the trustee of New Scheme. 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,請查閱新計劃的強積金計劃說明書及主要計劃資料文件,該文件可於積金局的網頁下載,你也可向積金易平台/新計劃的受託人查詢詳情。

4. 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 eMPF Platform / the new trustee or your transfer request cannot be processed. 請確保你在新計劃已開立個人帳戶或供款帳戶,否則,你須先行登記參加該計劃,然後才向積金易平台/新受託人遞交第 MPF(S)-P(M) 號表格,否則你的轉移要求不能獲處理。

5. 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 investment mandate of selected MPF account. In the below events, the transferred-in benefits will be invested in the default investment strategy (DIS) if you either: 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,轉入權益將會根據已選擇的強積金帳戶的投資授權進行投資。就下列情況,轉入權益將會根據預設投資策略進行投資,如你:

(i) do not give or have not given any investment instructions for the account in the new scheme to the eMPF Platform / the trustee; or 沒有或尚未就有關新計劃的帳戶向積金易平台/受託人給予任何投資指示;或

(ii) have given invalid investment instructions for the account in the new scheme. 就有關新計劃的帳戶給予無效的投資指示。

Please approach the eMPF Platform / the 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 eMPF Platform / the trustee. 如有需要,請向積金易平台/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,亦請聯絡積金易平台/受託人。

6. 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 eMPF Platform / the trustee 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 contact the eMPF Platform / the trustee if you wish to know the details of how the eMPF Platform / the trustee handles these transactions. 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。如積金易平台/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,積金易平台/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。如欲瞭解積金易平台/受託人如何處理該等交易,請與積金易平台/受託人聯絡。

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7. (i) If the accrued benefits is transferred between the member accounts within the **same scheme and same investment class (if applicable)**, such request will be processed: 如轉移累算權益乃於**同一計劃及由相同投資單位類別 (如適用)** 內轉至另一成員帳戶，其轉移將以下列方式進行：
   a. by way of unit transfer for the unitized constituent funds; and 所有單位化的成分基金以轉移單位方式進行轉移；及
   b. by way of transferring account balance for the non-unitized constituent fund(s). 非單位化的成分基金會以轉移帳戶結餘方式進行轉移。

   In short, there is no selling or buying of funds during the transfer process. The latest investment mandate of the member account concerned is not applicable to the accrued benefits being transferred under such transfer arrangement. 概括而言，轉移過程並不涉及任何基金買賣，而相關成員帳戶內的最新投資授權並不適用於此轉移安排下的相關累算權益。

   (ii) If the accrued benefits is transferred between the member accounts 如成員轉移累算權益乃於
   a. (1) with **different investment classes within the same scheme**, or **同一計劃內不同的投資單位類別**進行，或
      (2) **across different schemes**, **不同計劃進行**，

      All existing unit holdings in the existing member account will be redeemed. The redemption proceeds will be reinvested in accordance with the latest investment mandate of the chosen member account, or 現有成員帳戶內所有持有單位將被贖回，該贖回款項將根據所選擇的成員帳戶的最新投資授權再作投資，或
   b. all existing unit holdings in the existing member account will be redeemed and re-designated to respective investment class of the same fund(s) in the same scheme. (Applicable to BCT Strategic MPF Scheme and Manulife RetireChoice (MPF) Scheme only) 現有成員帳戶內所有持有單位將被贖回及重新配置至同一計劃相同基金的相應投資單位類別。(只適用於 BCT 強積金策略計劃及宏利退休精選 (強積金) 計劃)

8. 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 eMPF Platform / 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 eMPF Platform / 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. 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。積金易平台／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。積金易平台／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，倘若這些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。
9. 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. 如欲從多於一個帳戶轉出權益，請就每個帳戶分別遞交一份第 MPF(S)-P(M) 號表格。
10. If you wish to transfer-out the benefits from your contribution account during employment, you should complete Form MPF(S)-P(P). 如欲在現職期間從你的供款帳戶轉出權益，請填寫第 MPF(S)-P(P) 號表格。
11. For each account, when a scheme member elected to transfer out the benefits, the entirety of benefits will be transferred 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. 就每一個帳戶，當計劃成員轉移權益時，除了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，帳戶內的所有權益將會整筆轉移。
12. **Please DO NOT sign on a blank form.** After the completed Form MPF(S)-P(M) has been received by the eMPF Platform / the trustee, the administration procedures taken by the eMPF Platform / the trustee may not be reversible. **請勿在空白的表格上簽署。**在積金易平台／受託人收到已填妥的第 MPF(S)-P(M) 號表格後，之前由積金易平台／受託人採取的行政步驟未必能夠撤銷。
13. If any information provided on Form MPF(S)-P(M) (including the signature) is incorrect or incomplete, the eMPF Platform may not be able to process your benefit transfer request. 若你在第 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，積金易平台可能無法處理你的權益轉移要求。
14. Please refer to the publication of the 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. 有關選擇計劃時各項考慮因素及強積金投資的潛在風險，請參閱積金局網頁 (www.mpfa.org.hk) 的相關宣傳刊物。

Enquiries 查詢

15. Information about the new scheme is set out in the MPF Scheme Brochure and the KSID of that scheme, which can be found on the website of the MPFA (www.mpfa.org.hk). This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the eMPF Platform for enquiries about account details or contact the relevant trustee(s) via their website(s) / hotline(s) for schemes or funds details. 新計劃的強積金計劃說明書及主要計劃資料文件載有該計劃的資料。該文件可於積金局 (www.mpfa.org.hk) 的網頁下載，這些資料將有助你決定是否把權益轉移至該計劃。請透過積金易平台查詢帳戶詳情或透過相關受託人網頁／熱線聯絡受託人以查詢計劃或基金的資料。
16. If you wish to make enquiries or seek assistance in relation to your election to transfer benefit, please contact the eMPF Platform (for the scheme has got onboard to the eMPF Platform) or the trustee(s) (for the scheme has not got onboard to the eMPF Platform). 如欲就你的權益轉移申請作出查詢或尋求協助，請聯絡積金易平台 (計劃已轉移至積金易平台適用) 或受託人 (計劃尚未轉移至積金易平台適用)。

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APPENDIX A: LIST OF MPF SCHEMES 附錄 A: 強積金計劃列表

Scheme Name 計劃名稱	Trustee Name 受託人名稱	Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日 / 月 / 年)
AIA MPF - Prime Value Choice 友邦強積金優選計劃	AIA Company (Trustee) Limited 友邦（信託）有限公司	03 / 09 / 2025
AMTD MPF Scheme AMTD 強積金計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025
BCOM Joyful Retirement MPF Scheme 交通銀行愉盈退休強積金計劃	Bank of Communications Trustee Limited 交通銀行信託有限公司	03 / 09 / 2024
BCT (MPF) Industry Choice BCT（強積金）行業計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	Details to be announced 詳情稍後公佈
BCT (MPF) Pro Choice BCT 積金之選		01 / 08 / 2025
BCT Strategic MPF Scheme BCT 強積金策略計劃		03 / 07 / 2025
BEA (MPF) Industry Scheme 東亞（強積金）行業計劃	Bank of East Asia (Trustees) Limited 東亞銀行（信託）有限公司	Details to be announced 詳情稍後公佈
BEA (MPF) Master Trust Scheme 東亞（強積金）集成信託計劃		05 / 03 / 2025
BEA (MPF) Value Scheme 東亞（強積金）享惠計劃		29 / 10 / 2024
BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme 中銀保誠簡易強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025
China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃	China Life Trustees Limited 中國人壽信託有限公司	29 / 07 / 2024
Fidelity Retirement Master Trust 富達退休集成信託	HSBC Provident Fund Trustee (Hong Kong) Limited	30 / 12 / 2025
Haitong MPF Retirement Fund 海通 MPF 退休金		
Hang Seng Mandatory Provident Fund - SuperTrust Plus 恒生強積金智選計劃		29 / 01 / 2026
HSBC Mandatory Provident Fund - SuperTrust Plus 滙豐強積金智選計劃		
Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃	Manulife Provident Funds Trust Company Limited 宏利公積金信託有限公司	06 / 11 / 2025
Manulife RetireChoice (MPF) Scheme 宏利退休精選（強積金）計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025
MASS Mandatory Provident Fund Scheme 萬全強制性公積金計劃	YF Life Trustees Limited 萬通信託有限公司	26 / 06 / 2024
My Choice Mandatory Provident Fund Scheme 我的強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025
Principal MPF – Simple Plan 信安強積金 – 易富之選	Principal Trust Company (Asia) Limited 信安信託（亞洲）有限公司	07 / 05 / 2025
Principal MPF – Smart Plan 信安強積金 – 明智之選		
Principal MPF Scheme Series 800 信安強積金計劃 800 系列		
SHKP MPF Employer Sponsored Scheme 新地強積金僱主贊辦計劃	Standard Chartered Trustee (Hong Kong) Limited 渣打信託（香港）有限公司	02 / 10 / 2024
Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	Sun Life Trustee Company Limited 永明信託有限公司	03 / 10 / 2025

友邦機密及專利資料。嚴禁分發。

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APPENDIX B: LIST OF "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE ONBOARDED MPF SCHEMES
附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》(「聲明」)列表

Below are the PICS of the eMPF Platform and the onboarded MPF schemes. Please download and read the PICS of the eMPF Platform and the onboarded MPF scheme(s) via visiting the website of the eMPF Platform or scanning respective QR code. Alternatively, you may also get a copy of the PICS by calling eMPF Customer Service Hotline 183 2622 or visiting any one of the eMPF Service Centres. For MPF scheme(s) which has / have not got onboard, please contact the relevant trustee(s) for the PICS of the relevant scheme(s). 下列為積金易平台及已轉移至積金易平台的強積金計劃的「聲明」。請瀏覽積金易平台的網頁或掃描相關二維碼下載及詳閱積金易平台及已轉移至積金易平台的強積金計劃「聲明」。你亦可致電積金易客戶服務熱線 183 2622 或到訪任何一間積金易服務中心索取「聲明」副本。就尚未轉移至積金易平台的強積金計劃，請聯絡有關受託人索取相關計劃的「聲明」。

Personal Information Collection Statement of The eMPF Platform 積金易平台收集個人資料聲明			Link / QR Code 連結／二維碼
The eMPF Platform 積金易平台			https://empf.org.hk/picsJen
Personal Information Collection Statement of The Onboarded MPF Schemes 已轉移至積金易平台的強積金計劃收集個人資料聲明			
Scheme Name 計劃名稱	**Trustee Name 受託人名稱**	**Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日／月／年)**	**Link / QR Code 連結／二維碼**
AIA MPF - Prime Value Choice 友邦強積金優選計劃	AIA Company (Trustee) Limited 友邦（信託）有限公司	03 / 09 / 2025	https://empf.org.hk/pics_aia
AMTD MPF Scheme AMTD 強積金計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025	https://empf.org.hk/pics_bctad
BCOM Joyful Retirement MPF Scheme 交通銀行愉盈退休強積金計劃	Bank of Communications Trustee Limited 交通銀行信託有限公司	03 / 09 / 2024	https://empf.org.hk/pics_bocom
BCT (MPF) Pro Choice BCT 積金之選	Bank Consortium Trust Company Limited 銀聯信託有限公司	01 / 08 / 2025	https://empf.org.hk/pics_bctpc
BCT Strategic MPF Scheme BCT 強積金策略計劃		03 / 07 / 2025	https://empf.org.hk/pics_bctsc
BEA (MPF) Master Trust Scheme 東亞（強積金）集成信託計劃	Bank of East Asia (Trustees) Limited 東亞銀行（信託）有限公司	05 / 03 / 2025	https://empf.org.hk/pics_beamt
BEA (MPF) Value Scheme 東亞（強積金）享惠計劃		29 / 10 / 2024	https://empf.org.hk/pics_bea
BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme 中銀保誠簡易強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025	https://empf.org.hk/pics_bociet
China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃	China Life Trustees Limited 中國人壽信託有限公司	29 / 07 / 2024	https://empf.org.hk/pics_chinalife
Fidelity Retirement Master Trust 富達退休集成信託	HSBC Provident Fund Trustee (Hong Kong) Limited	30 / 12 / 2025	https://empf.org.hk/pics_hsbcfid
Haitong MPF Retirement Fund 海通 MPF 退休金			https://empf.org.hk/pics_hsbcht
Hang Seng Mandatory Provident Fund - SuperTrust Plus 恒生強積金智選計劃		29 / 01 / 2026	https://empf.org.hk/pics_hsbchs
HSBC Mandatory Provident Fund - SuperTrust Plus 滙豐強積金智選計劃			https://empf.org.hk/pics_hsbchb

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Personal Information Collection Statement of The Onboarded MPF Schemes 已轉移至積金易平台的強積金計劃收集個人資料聲明			
Scheme Name 計劃名稱	**Trustee Name 受託人名稱**	**Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日／月／年)**	**Link / QR Code 連結／二維碼**
Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃	Manulife Provident Funds Trust Company Limited 宏利公積金信託有限公司	06 / 11 / 2025	https://empf.org.hk/pics_manl
Manulife RetireChoice (MPF) Scheme 宏利退休精選（強積金）計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025	https://empf.org.hk/pics_bctrc
MASS Mandatory Provident Fund Scheme 萬全強制性公積金計劃	YF Life Trustees Limited 友通信託有限公司	26 / 06 / 2024	https://empf.org.hk/pics_yflife
My Choice Mandatory Provident Fund Scheme 我的強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025	https://empf.org.hk/pics_bocimp
Principal MPF – Simple Plan 信安強積金 – 易富之選	Principal Trust Company (Asia) Limited 信安信託（亞洲）有限公司	07 / 05 / 2025	https://empf.org.hk/pics_prinsp
Principal MPF – Smart Plan 信安強積金 – 明智之選			https://empf.org.hk/pics_prinsm
Principal MPF Scheme Series 800 信安強積金計劃 800 系列			https://empf.org.hk/pics_prins8
SHKP MPF Employer Sponsored Scheme 新地強積金僱主發辦計劃	Standard Chartered Trustee (Hong Kong) Limited 渣打信託（香港）有限公司	02 / 10 / 2024	https://empf.org.hk/pics_sc
Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	Sun Life Trustee Company Limited 永明信託有限公司	03 / 10 / 2025	https://empf.org.hk/pics_sun

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填寫轉移申請表格之常見錯誤

文件類型	常見錯誤
成員資金轉移申請表-計劃成員資金轉移申請表、計劃成員整合個人賬戶申請表、僱員自選安排-轉移選擇表格、計劃成員可扣稅自願性供款轉移申請表	• 表格中填寫的資料不完整/不正確 • 轉移表格頁數不完整 • 欠缺計劃編號，欠缺新計劃名稱/受託人名稱 • 原計劃名稱/受託人名稱不正確 • 欠缺原計劃成員帳戶編號 • 欠缺AIA計劃成員帳戶編號 • 聲明部分中的資料不正確/不完整 • 中介人編號~~編號~~不正確 • 中介人名稱不完整

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「僱員自選安排」轉移選擇表格 - P(P)範例

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eMPF 積金易

適合俗稱「 半自由行 」的客戶使用

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

eMPF Web Portal 積金易網上平台

Internal use only 內部專用

eMPF Received Date:

P(P)

EMPLOYEE CHOICE ARRANGEMENT (ECA) – TRANSFER ELECTION FORM [FORM MPF(S) – P(P)]

「僱員自選安排」– 轉移選擇表格 [第 MPF(S) – P(P) 號表格]

P(P)

(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 適用於僱員在現職期間把現載的強積金註冊計劃 (原計劃) 供款帳戶內的強積金累算權益 (權益) 轉移至自選計劃 (新計劃) 的帳戶)

Sections 148A and 148B of the Mandatory Provident Fund Schemes (General) Regulation (Cap. 485A) 《強制性公積金計劃 (一般) 規例》 (第 485A 章) 第 148A 及 148B 條

Important Notes 重要事項：

1. eMPF Platform Company Limited ("eMPF Company"), a wholly owned subsidiary of the Mandatory Provident Fund Schemes Authority ("MPFA"), will provide the scheme administration services to you through the eMPF Platform, subject to the "General Terms and Conditions of the eMPF Platform" which can be accessed from https://empf.org.hk/tnc/en. This form is only applicable to the new MPF scheme which has got onboard to the eMPF Platform. For details, please refer to the Appendix B: List of "Personal Information Collection Statement" ("PICS") of The eMPF Platform and The Onboarded MPF Schemes. If new MPF scheme has not yet got onboard to the eMPF Platform, please complete the relevant transfer form provided by the new trustee. 積金易平台有限公司 (「積金易公司」) 是強制性公積金計劃管理局 (「積金局」) 的全資附屬公司，積金易公司將根據「積金易平台一般條款及細則」(可於 https://empf.org.hk/tnc 瀏覽) ，透過積金易平台為你提供計劃行政服務。本表格只適用於已轉移至積金易平台的強積金計劃。詳情請參閱附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》(「聲明」) 列表。如新強積金計劃尚未轉移至積金易平台，請填寫由新受託人提供的相關轉移表格。

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

2. Please read the Explanatory Notes and Guide to Transfer of MPF Accrued Benefits ("Benefits") by Scheme Member carefully before completing this form. 填寫本表格前，請先細閱註釋及計劃成員轉移強積金累算權益 (「權益」) 指南。
3. Please complete this form in BLOCK LETTERS with black or blue pen and tick the appropriate box(es). Please countersign beside any amendment. 請用黑色或藍色筆以正楷填寫本表格，並在適當空格內填上剔號。如有更改，請於更改位置旁加簽。
4. The signature (including countersign) in this form should match with the signature specimen of the original account. 本表格的簽署 (包括加簽) 必須與原帳戶的簽署樣式相符。
5. The eMPF Platform will process this request upon receipt of this completed form and all relevant supporting document(s) (if any). If there are any omissions (including but not limited to missing page(s) / supporting document(s)), the eMPF Platform may not be able to process this request. 積金易平台收到完整表格及相關證明文件 (如有) 後，才會處理有關指示。如有遺漏 (包括但不限於頁數／證明文件不齊全) ，積金易平台可能未能執行此指示。
6. If (i) mobile phone no., (ii) email address and / or (iii) correspondence address of the scheme member provided in this form is different from the records of the eMPF Platform AND the signature in this form matches with the signature specimen of the original account, the eMPF Platform will update those information to the original member account as indicated in the form. 如計劃成員在本表格提供的 (i) 手提電話號碼，(ii) 電郵地址及／或 (iii) 通訊地址與積金易平台的紀錄不同，而本表格上的簽署與原帳戶的簽署樣式相符，積金易平台便會更新該資料至本表格所指示的原有成員帳戶。
7. 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 MPFA. 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，包括積金局。
8. The information provided in this form will be used in accordance with the relevant MPF legislation and for the purposes mentioned in the PICS of the eMPF Platform and the Schemes referred / listed in Part B and C below. For details, please refer to the Appendix B. 本表格所有已提供的資料將按照有關強積金法例、積金易平台及下列 B 及 C 部分所指／所列計劃「聲明」處理。詳情請參閱附錄 B。

A. SCHEME MEMBER'S DETAILS 計劃成員資料

(1) Name [Note 1] 姓名 [#1] (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同)

Surname in English 英文姓氏: CHAN

Given Name in English 英文名字: TAI MAN ("the Member")

Name in Chinese 中文姓名: (Surname 姓氏) 陳 (Given Name 名字) 大文 (「成員」)

(2) Identification 身分證明

☑ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼: Y1234567

友邦機密及專利資料。嚴禁分發。

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(3) Contact Details 聯絡資料

(i) Mobile Phone No. 手提電話號碼 852 (Country / Area Code* 國家／地區編號*) 62342345

(ii) Daytime Phone No. / Secondary Telephone No. 日間聯絡電話號碼／第二聯絡電話號碼 (Country / Area Code* 國家／地區編號*)

* SMS (if applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊（如適用）只發送至香港手提電話號碼，如未有提供國家／地區編號，將預設為「香港（852）」。

(iii) Email Address 電郵地址 (If any 如有) chantaiman123@gmail.com

(4) Correspondence Address 通訊地址 (Please provide either English OR Chinese address 請提供英文或中文地址)

Flat / Room 單位／室	C	Floor 層數	30	Block 座	2
Building / Estate 大廈／屋苑	開心大廈				
Street (Street No. and Street Name) 街道（街號及街道名稱）	開心路10號				
District Area 區域	上環				

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City* 城市* | Country* / Region* 國家*／地區*

Postal code* 郵政編號*

* Applicable to address outside Hong Kong only 只適用於香港以外地址

此部分是填寫原計劃的資料 (轉出資金)

B. CONTRIBUTION ACCOUNT INFORMATION IN ORIGINAL SCHEME 原計劃的供款帳戶資料

(1) Name of Original Scheme Note 2 & * 原計劃名稱 註 2 及 *: XXXX計劃

(2) Member Account No. Note 2 成員帳戶號碼 註 2: 12345678

(3) Employer Account No. Notes 2 & 3 僱主帳戶號碼 註 2 及 3: 87654321

* Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃列表

此部分是填寫AIA計劃的資料 (轉入資金)

C. TRANSFER OF BENEFITS Note 4 轉移權益 註 4

客戶根據其需要✓其中一個選項 (1) / (2)

Please indicate the part(s) of benefits in your contribution account of Original Scheme that you wish to transfer out to another MPF account. 請註明你擬把原計劃供款帳戶內哪部分的權益轉移至另一個強積金帳戶。(Please select either option (1) or (2) and tick as appropriate. 請選擇 (1) 或 (2)，並於適當方格內填上剔號。)

☑ (1) Transfer ALL Benefits 轉移全部權益

選項1：轉移全部權益到AIA 成員賬戶

I wish to transfer ALL the benefits comprising the following parts from my contribution account of Original Scheme as its governing rules permit
本人擬在管限規則准許下轉移原計劃供款帳戶內以下全部權益：

- Employee mandatory contributions in current employment Notes 5 & 6
  現職期間的僱員強制性供款 註 5 及 6
- Employee voluntary contributions in current employment Notes 7 & 8
  現職期間的僱員自願性供款 註 7 及 8
- Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s) Note 9
  以往工作所累積並已轉移至供款帳戶的強制性供款 註 9
- Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s) Notes 9 & 10
  以往工作所累積並已轉移至供款帳戶的自願性供款 註 9 及 10

Please transfer the benefits to the following personal account 請把權益轉移至以下個人帳戶：

(i) Name of New Scheme Note 11 & * 新計劃名稱 註 11 及 *	友邦強積金優選計劃
(ii) Member Account No. Note 11 成員帳戶號碼 註 11	12345678

必須清楚填寫帳戶號碼 （包括AIA的帳戶號碼）

友邦機密及專利資料。嚴禁分發。

選項2：轉移部分權益到AIA帳戶

僅供內部培訓之用

☑ (2) Transfer Part(s) of Benefits 轉移部分權益

I wish to transfer the following part(s) of the benefits from my contribution account of Original Scheme as its governing rules permit 本人擬在管限規則准許下轉移原計劃供款帳戶內以下部分權益：（you may select one or more parts below and tick as appropriate 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剔號）

Type of account receiving the benefits 接收權益的帳戶類別	Benefits to be transferred from Original Scheme 由原計劃轉出的累算權益 轉出
Personal account only 只限個人帳戶	☐ Employee mandatory contributions in current employment 現職期間的僱員強制性供款
	☐ Employee voluntary contributions in current employment 現職期間的僱員自願性供款
Personal account or contribution account 個人帳戶 或 供款帳戶	☐ Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s) 以往工作所累積並已轉移至供款帳戶的強制性供款
	☐ Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s) 以往工作所累積並已轉移至供款帳戶的自願性供款

Please transfer the benefits selected above to the following account 請將上述選擇的權益轉移至以下帳戶： 轉入

(i) Name of New Scheme 新計劃名稱 ^	友邦強積金優選計劃
(ii) Account Type 帳戶類型 (Select ONE only* and tick as appropriate 只可選擇一項*，並於適當方格內填上剔號)	☐ Personal account 個人帳戶 OR 或 ☐ Contribution account 供款帳戶 (Employer Account No. 僱主帳戶號碼:)
(iii) Member Account No. 成員帳戶號碼	1 2 3 4 5 6 7 8 客戶根據其需要✓其中一個方格

^ Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃列表

* 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. 如欲將供款帳戶內不同部分的權益轉移至不同的強積金帳戶，請就每個將會接收該等權益的強積金帳戶分別填寫一份表MPF(S)-P(P)號表格。

D. AUTHORIZATION AND DECLARATION 授權及聲明

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

1. I hereby give consent to the trustee of my elected scheme, the eMPF Platform and 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. 本人同意，本人選擇的計劃的受託人、積金易平台及積金局就理本人的轉移申請，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。
2. I have read and understood the General Terms and Conditions of the eMPF Platform, the Important Notes, the Explanatory Notes, the Guide to Transfer of MPF Benefits ("Benefits") under Employee Choice Arrangement and the PICS of the eMPF Platform and the Schemes listed in Part B and C, and have voluntarily elected to transfer my MPF benefits in accordance with this Form. 本人已閱讀及明白積金易平台一般條款及細則、重要事項、註釋、「僱員自選安排」強積金累算權益（「權益」）轉移指南及積金易平台及於 B 及 C 部分所列計劃「聲明」的內容，並自願選擇按照本表格轉移強積金權益。
3. As of the date when I submit this form, I confirm that I am being employed by the employer in relation to the contribution account in Original Scheme. 截至遞交本表格當日，本人確認仍受僱於為本人開立原計劃供款帳戶的僱主。
4. To the best of my knowledge and belief, the information given in this form is correct and complete. 盡本人所知所信，本表格所提供的資料均屬正確無誤且無缺漏。

Signature of Member 成員簽署	Date 日期
Peter Chan	31 / 10 / 2025 DD 日 / MM 月 / YYYY 年

必須清楚填寫帳戶號碼 （包括AIA的帳戶號碼）

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

Form Submission 遞交表格

Transfer Option 轉移選擇	If the new scheme has got onboard to the eMPF Platform ▲ 如新計劃已轉移至積金易平台 ▲	If the new scheme has NOT got onboard to the eMPF Platform 如新計劃尚未轉移至積金易平台
Transfer benefits to the new scheme ▽ 把權益轉移至新計劃 ▽	The eMPF Platform 積金易平台	New Trustee 新受託人

▲ For onboarded schemes, please refer to Appendix B: List of "Personal Information Collection Statement" ("PICS") of The eMPF Platform and The Onboarded MPF Schemes. 就有關已轉移的強積金計劃，請參閱附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》（「聲明」）列表。

▽ If you need to submit the form to the eMPF Platform, please refer to the eMPF Platform Submission Channels listed below; if you need to submit the form to the new trustee, please contact the new trustee for submission arrangement. 如你需遞交表格予積金易平台，請參閱下列積金易平台遞交途徑；如你需遞交表格予新受託人，請聯絡新受託人查詢遞交安排。

Submission Channels 遞交途徑

1. Post: PO Box 98929 Tsim Sha Tsui Post Office
   郵寄：尖沙咀郵政局郵政信箱 98929 號
2. Drop-in Box in any one of the eMPF Service Centres below
   下列任何一間積金易服務中心的投遞箱
3. Email address 電郵地址：forms@support.empf.org.hk
4. Fax 傳真：3197 2988

Please do **NOT** submit duplicate copies to avoid duplication.
請勿遞交相同表格，以免重複。

Enquiries 查詢

1. eMPF Customer Service Hotline 積金易客戶服務熱線：183 2622
2. Email address 電郵地址：enquiry@support.empf.org.hk
3. Fax 傳真：3197 2922

eMPF Service Centres Address & Service Hours 積金易服務中心地址及服務時間

Hong Kong Island 香港島	Kowloon 九龍	New Territories 新界
Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong 香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室	Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon 九龍尖沙咀東部麼地道 77 號華懋廣場 12 樓 1205-6 室	Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories 新界荃灣楊屋道 8 號如心廣場第 2 座 18 樓 1802A 室

Service Hours 服務時間：

Monday to Friday	星期一至五	9:00 am – 6:00 pm	上午 9 時 至 下午 6 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

eMPF Customer Service Hotline Service Hours 積金易客戶服務熱線服務時間

Monday to Friday	星期一至五	9:00 am – 7:00 pm	上午 9 時 至 下午 7 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

MPF INTERMEDIARY DETAILS 強積金中介人資料 (For MPF Intermediary Use Only 只供強積金中介人填寫)

Intermediary Name 1 中介人名稱 1: Wong Man Kit	Intermediary Name 2 中介人名稱 2:
MPF Registration No. 強積金註冊編號: 123456	MPF Registration No. 強積金註冊編號:
Agent / Broker Code. 經紀／代理人編號: A0001	Agent / Broker Code. 經紀／代理人編號:

!!!重要提示!!!

如使用此積金易表格，需額外提交友邦強積金客戶聲明及同意書至AIA此申請表格及簽名核實證明文件（SV）則提交至積金易平台

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

EXPLANATORY NOTES 註釋

1. If you do NOT possess a HKID Card, please fill in your name as shown on your passport. 如你沒有香港身份證，請填上你在護照上的姓名。

2. The transfer election may not be processed if the name of Original Scheme, Member Account No. or the Employer Account No. 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 issued by the eMPF Platform / the original trustee. If you are in doubt, please contact the eMPF Platform, the original trustee or your employer. Please refer to the Appendix A: List of MPF Schemes for the name of schemes. 如你沒有提供原計劃名稱、成員帳戶號碼或僱主帳戶號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可透過積金易平台／原受託人發出的成員證明書、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，請聯絡積金易平台、原受託人或僱主。有關強積金計劃的名稱，可參閱附錄 A: 強積金計劃列表。

3. The employer account no. is the number assigned by the eMPF Platform / the trustee to the employer concerned. The number can be found in the statements issued by the eMPF Platform / the trustee or through the member enquiry facilities available from the eMPF Platform / the trustee. Trustees may use different names for this number (e.g. identification no., account number, company code, contract number, employer account no., employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). If you are in doubt, please contact the eMPF Platform, the trustee or your employer. 僱主帳戶號碼即積金易平台／受託人為有關僱主編配的號碼。你可查閱積金易平台／受託人發出的報表或透過積金易平台／受託人提供的成員查詢服務獲取該號碼。受託人或會使用不同名稱來設定此號碼（例如識別號碼、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）。如有疑問，請聯絡積金易平台、受託人或僱主。

4. If any part of the benefits chosen under Part C contains nil balance, that part will not be processed. 如你在 C 部分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. (i) 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). 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。

   (ii) 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. 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. 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. 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. (i) This means all benefits in the sub-account referred to in section 78(6)(e) of the Regulation. 這是指《規例》第 78(6)(e) 條所提述的分帳戶內的全部權益。

   (ii) 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. 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. 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. 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. 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. 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. 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. 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. The transfer election may not be processed if the name of New Scheme, Account Type, Employer Account No. or your Member Account No. 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 issued by the eMPF Platform / the new trustee. You may, however, leave the Employer Account No. and the Member Account No. blank if you have recently enrolled in the scheme and have not been notified of those numbers. If you are in doubt, please contact the eMPF Platform / the new trustee. Please refer to the Appendix A: List of MPF Schemes for the name of schemes. 如你沒有提供新計劃名稱、帳戶類別、僱主帳戶號碼或成員帳戶號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可透過積金易平台／新受託人發出的成員證明書、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，並未獲悉僱主帳戶號碼及成員帳戶號碼，則可留空此項。如有疑問，請聯絡積金易平台／新受託人。有關強積金計劃的名稱，可參閱附錄 A: 強積金計劃列表。

12. The signature must be the same as your signature specimen previously given to the eMPF Platform / the original trustee. Please note that the transfer may not be processed if the signature provided in this form does not match your signature specimen previously given to the eMPF Platform / the original trustee. If you are in doubt, please contact the eMPF Platform / the original trustee. 你的簽署必須與你之前給予積金易平台／原受託人的簽署樣式相符。請注意，若本表格上的簽署與你之前給予積金易平台／原受託人的簽署樣式不符，有關轉移或不獲處理。如有疑問，請聯絡積金易平台／原受託人。

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GUIDE TO TRANSFER OF MPF ACCRUED BENEFITS ("BENEFITS") UNDER EMPLOYEE CHOICE ARRANGEMENT (ECA)
「僱員自選安排」強積金累算權益(「權益」)轉移指南

Explanation of terms used in Form MPF(S)-P(P), the Explanatory Notes and this Guide 第 MPF(S)-P(P) 號表格、註釋及本《指南》的用詞解釋:

Definition of terms 用詞定義:

(i) "Contribution account" 「供款帳戶」 – 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.
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)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。

(ii) "Personal account" 「個人帳戶」 – 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).
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)

(iii) "Original Scheme" 「原計劃」 – the scheme from which your benefits are to be transferred.
指轉出你的權益的計劃。

(iv) "New Scheme" 「新計劃」 – 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.
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。

(v) "Calendar year" 「公曆年」 – the one-year period from 1 January to 31 December.
指由1月1日至12月31日的一年期間。

Rights of employees under the ECA 僱員在「僱員自選安排」下可享的權利

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. 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. 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. 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:

Parts of benefits in a contribution account 供款帳戶內的各部分權益		Under ECA 在「僱員自選安排」下權益可作轉移的情況
(i)	Employer mandatory contributions in current employment 現職期間的僱主強制性供款	Not transferable 不可轉移
(ii)	Employee mandatory contributions in current employment 現職期間的僱員強制性供款	Transferable to an MPF personal account **once per calendar year** [1] 可**每公曆年一次**[1]轉出至強積金個人帳戶
(iii)	Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s) 以往工作所累積並已轉移至供款帳戶的強制性供款	Transferable to an MPF personal account or contribution account anytime 可隨時轉出至強積金個人帳戶或供款帳戶

[1] Unless the governing rules of Original Scheme provide for more frequent transfer-out [1] 如原計劃的管限規則訂明可多次轉出權益,即不在此限。

3. The transferability of benefits derived from voluntary contributions is subject to the governing rules of Original Scheme. Please check this information from the MPF Scheme Brochure and the Key Scheme Information Document ("KSID") of Original Scheme, which can be found on the website of the MPFA. You may also consult your employer or contact the eMPF Platform / the trustee of Original Scheme. 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,請查閱原計劃的強積金計劃說明書及主要計劃資料文件,該文件可於積金局的網頁下載。你也可向僱主或積金易平台/原計劃的受託人查詢詳情。
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 the eMPF Platform / your trustee of Original Scheme, or consult the eMPF Platform / the trustee of Original Scheme directly. 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,即不在此限)。**新計劃的受託人收到已填妥的轉移選擇表格的日期將用作計算轉移次數有否超出限額。**你可透過積金易平台/原計劃的受託人向你發出的轉移結算書上查閱該日期,或直接向積金易平台/原計劃的受託人查詢。
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). 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. 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). 從原計劃轉出你的權益後,現職僱主日後為你作出的供款(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)。

Reminders before making an election to transfer 作出轉移選擇前的注意事項

7. Before you decide to transfer your benefits to another scheme, you should take into consideration your personal needs and the following factors: 在你決定把權益轉移至另一個計劃前,你應考慮你的個人需要及以下因素:
   (i) services of the trustees (e.g. frequency of issuance of benefit statement to scheme members; number of free fund switching per year); 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);

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(ii) fees and charges of the funds (for detailed information, please refer to the website of the MPFA); 基金的收費（詳情請參閱積金局網頁）；

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

(iv) 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. 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。

Please check the MPF Scheme Brochure and the KSID of Original Scheme, which can be found on the website of the MPFA or consult the eMPF Platform / the original trustee for details. 有關詳情請查閱所計劃的強積金計劃說明書及主要計劃資料文件，該文件可於積金局的網頁下載，或向積金易平台／原受託人查詢。

8. 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 MPF Scheme Brochure and the KSID of the New Scheme, which can be found on the website of the MPFA or contact the eMPF Platform / the trustee of New Scheme. 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，請查閱新計劃的強積金計劃說明書及主要計劃資料文件，該文件可於積金局的網頁下載，你也可向積金易平台／新計劃的受託人查詢詳情。

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 eMPF Platform / the trustee. Please consult the eMPF Platform / the new trustee for the procedures and required documents for setting up an account. 請確保你在新計劃已開立強積金帳戶。否則，你在遞交本表格之時或在此之前，須向積金易平台／受託人遞交成員參加計劃表格。有關開立帳戶的程序及所需文件，請向積金易平台／新受託人查詢。

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 investment mandate of selected MPF account. In the below event, the transferred-in benefits will be invested in the default investment strategy (DIS) if you either: 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，轉入權益將會根據已選擇的強積金帳戶的投資授權進行投資。就下列情況，轉入權益將會根據預設投資策略進行投資，如你：

(i) do not give or have not given any investment instructions for the account in the new scheme to the eMPF Platform / the trustee; or 沒有或尚未就有關新計劃的帳戶向積金易平台／受託人給予任何投資指示；或

(ii) have given invalid investment instructions for the account in the New Scheme. 就有關新計劃的帳戶給予無效的投資指示。

Please approach the eMPF Platform / the trustee 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 eMPF Platform / the trustee. 如有需要，請向積金易平台／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，亦請聯絡積金易平台／受託人。

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 eMPF Platform / the trustee 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 contact the eMPF Platform / the trustee if you wish to know the details of how the eMPF Platform / the trustee handles these transactions. 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。如積金易平台／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，積金易平台／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。如欲瞭解積金易平台／受託人如何處理該等交易，請與積金易平台／受託人聯絡。

12. (i) If the accrued benefits is transferred between the member accounts within the **same scheme and same investment class (if applicable)**, such request will be processed: 如轉移累算權益乃於**同一計劃及由相同投資單位類別（如適用）**內轉至另一成員帳戶，其轉移將以下列方式進行：

a. by way of unit transfer for the unitized constituent funds; and 所有單位化的成分基金以轉移單位方式進行轉移；及

b. by way of transferring account balance for the non-unitized constituent fund(s). 非單位化的成分基金會以轉移帳戶結餘方式進行轉移。

In short, there is no selling or buying of funds during the transfer process. The latest investment mandate of the member account concerned is not applicable to the accrued benefits being transferred under such transfer arrangement. 概括而言，轉移過程並不涉及任何基金買賣，而相關成員帳戶內的最新投資授權並不適用於此轉移安排下的相關累算權益。

(ii) If the accrued benefits is transferred between the member accounts 如成員轉移累算權益乃於

a. with **different investment classes within the same scheme**, or **同一計劃內不同的投資單位類別**進行，或

b. **across different schemes**, **不同計劃進行**，

all existing unit holdings in the existing member account will be redeemed. The redemption proceeds will be reinvested in accordance with the latest investment mandate of the chosen member account. 現有成員帳戶內所有持有單位將被贖回，該贖回款項將根據所選擇的成員帳戶的最新投資授權再作投資。

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 eMPF Platform / 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 eMPF Platform / 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. 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。積金易平台／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。積金易平台／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. If you wish to transfer-out the benefits from more than one accounts, you should submit a separate Form MPF(S)-P(P) for each of those accounts. 如欲從多於一個帳戶轉出權益，請就每個帳戶分別遞交一份第 MPF(S)-P(P)號表格。

15. **Please DO NOT sign on a blank form.** After the completed form has been received by the eMPF Platform / the trustee, the administration procedures taken by the eMPF Platform / the trustee may not be reversible. **請勿在空白的表格上簽署。**在積金易平台／受託人收到已填妥的表格後，由積金易平台／受託人已採取的行政步驟未必能夠撤銷。

16. If any information provided on Form MPF(S)-P(P) (including the signature) is incorrect or incomplete, the eMPF Platform may not be able to process your benefit transfer request. 若你在第 MPF(S)-P(P)號表格上提供的任何資料（包括簽署）不正確或不完整，積金易平台可能無法處理你的權益轉移要求。

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

Enquiries 查詢

18. Information about a scheme is set out in the MPF Scheme Brochure and the KSID of that scheme, which can be found on the website of the MPFA (www.mpfa.org.hk). This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the eMPF Platform for enquiries about account details or contact the relevant trustee(s) via their website(s) / hotline(s) for schemes or funds details. 計劃的強積金計劃說明書及主要計劃資料文件載有該計劃的資料，該文件可於積金局（www.mpfa.org.hk）的網頁下載，這些資料將有助你決定是否把權益轉移至該計劃。請透過積金易平台查詢帳戶詳情或透過相關受託人網頁／熱線聯絡受託人以查詢計劃或基金的資料。

19. If you wish to make enquiries or seek assistance in relation to your election to transfer benefit, please contact the eMPF Platform (for the scheme has got onboard to the eMPF Platform) or the trustee(s) (for the scheme has not got onboard to the eMPF Platform). 如欲就你的權益轉移申請作出查詢或尋求協助，請聯絡積金易平台（計劃已轉移至積金易平台適用）或受託人（計劃尚未轉移至積金易平台適用）。

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APPENDIX A: LIST OF MPF SCHEMES 附錄 A: 強積金計劃列表

Scheme Name 計劃名稱	Trustee Name 受託人名稱	Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日／月／年)
AIA MPF - Prime Value Choice 友邦強積金優選計劃	AIA Company (Trustee) Limited 友邦（信託）有限公司	03 / 09 / 2025
AMTD MPF Scheme AMTD 強積金計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025
BCOM Joyful Retirement MPF Scheme 交通銀行愉盈退休強積金計劃	Bank of Communications Trustee Limited 交通銀行信託有限公司	03 / 09 / 2024
BCT (MPF) Industry Choice BCT（強積金）行業計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	Details to be announced 詳情稍後公佈
BCT (MPF) Pro Choice BCT 積金之選		01 / 08 / 2025
BCT Strategic MPF Scheme BCT 強積金策略計劃		03 / 07 / 2025
BEA (MPF) Industry Scheme 東亞（強積金）行業計劃	Bank of East Asia (Trustees) Limited 東亞銀行（信託）有限公司	Details to be announced 詳情稍後公佈
BEA (MPF) Master Trust Scheme 東亞（強積金）集成信託計劃		05 / 03 / 2025
BEA (MPF) Value Scheme 東亞（強積金）享惠計劃		29 / 10 / 2024
BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme 中銀保誠簡易強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025
China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃	China Life Trustees Limited 中國人壽信託有限公司	29 / 07 / 2024
Fidelity Retirement Master Trust 富達退休集成信託	HSBC Provident Fund Trustee (Hong Kong) Limited	30 / 12 / 2025
Haitong MPF Retirement Fund 海通 MPF 退休金		
Hang Seng Mandatory Provident Fund - SuperTrust Plus 恒生強積金智選計劃		29 / 01 / 2026
HSBC Mandatory Provident Fund - SuperTrust Plus 滙豐強積金智選計劃		
Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃	Manulife Provident Funds Trust Company Limited 宏利公積金信託有限公司	06 / 11 / 2025
Manulife RetireChoice (MPF) Scheme 宏利退休精選（強積金）計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025
MASS Mandatory Provident Fund Scheme 萬全強制性公積金計劃	YF Life Trustees Limited 萬通信託有限公司	26 / 06 / 2024
My Choice Mandatory Provident Fund Scheme 我的強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025
Principal MPF – Simple Plan 信安強積金 – 易富之選	Principal Trust Company (Asia) Limited 信安信託（亞洲）有限公司	07 / 05 / 2025
Principal MPF – Smart Plan 信安強積金 – 明智之選		
Principal MPF Scheme Series 800 信安強積金計劃 800 系列		
SHKP MPF Employer Sponsored Scheme 新地強積金僱主贊辦計劃	Standard Chartered Trustee (Hong Kong) Limited 渣打信託（香港）有限公司	02 / 10 / 2024
Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	Sun Life Trustee Company Limited 永明信託有限公司	03 / 10 / 2025

友邦機密及專利資料。嚴禁分發。

僅供內部培訓之用

APPENDIX B: LIST OF "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE ONBOARDED MPF SCHEMES
附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》(「聲明」)列表

Below are the PICS of the eMPF Platform and the onboarded MPF schemes. Please download and read the PICS of the eMPF Platform and the onboarded MPF scheme(s) via visiting the website of the eMPF Platform or scanning respective QR code. Alternatively, you may also get a copy of the PICS by calling eMPF Customer Service Hotline 183 2622 or visiting any one of the eMPF Service Centres. For MPF scheme(s) which has / have not got onboard, please contact the relevant trustee(s) for the PICS of the relevant scheme(s). 下列為積金易平台及已轉移至積金易平台的強積金計劃的「聲明」。請瀏覽積金易平台的網頁或掃描相關二維碼下載及詳閱積金易平台及已轉移至積金易平台的強積金計劃「聲明」。你亦可致電積金易客戶服務熱線 183 2622 或到訪任何一間積金易服務中心索取「聲明」副本。就尚未轉移至積金易平台的強積金計劃，請聯絡有關受託人索取相關計劃的「聲明」。

Personal Information Collection Statement of The eMPF Platform 積金易平台收集個人資料聲明			Link / QR Code 連結／二維碼
The eMPF Platform 積金易平台			https://empf.org.hk/pics/en
Personal Information Collection Statement of The Onboarded MPF Schemes 已轉移至積金易平台的強積金計劃收集個人資料聲明			
Scheme Name 計劃名稱	**Trustee Name 受託人名稱**	**Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日／月／年)**	**Link / QR Code 連結／二維碼**
AIA MPF - Prime Value Choice 友邦強積金優選計劃	AIA Company (Trustee) Limited 友邦（信託）有限公司	03 / 09 / 2025	https://empf.org.hk/pics_aia
AMTD MPF Scheme AMTD 強積金計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025	https://empf.org.hk/pics_bctad
BCOM Joyful Retirement MPF Scheme 交通銀行怡盈退休強積金計劃	Bank of Communications Trustee Limited 交通銀行信託有限公司	03 / 09 / 2024	https://empf.org.hk/pics_bocom
BCT (MPF) Pro Choice BCT 積金之選	Bank Consortium Trust Company Limited 銀聯信託有限公司	01 / 08 / 2025	https://empf.org.hk/pics_bctpc
BCT Strategic MPF Scheme BCT 強積金策略計劃		03 / 07 / 2025	https://empf.org.hk/pics_bctsg
BEA (MPF) Master Trust Scheme 東亞（強積金）集成信託計劃	Bank of East Asia (Trustees) Limited 東亞銀行（信託）有限公司	05 / 03 / 2025	https://empf.org.hk/pics_beamt
BEA (MPF) Value Scheme 東亞（強積金）享惠計劃		29 / 10 / 2024	https://empf.org.hk/pics_bea
BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme 中銀保誠簡易強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025	https://empf.org.hk/pics_bocipc
China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃	China Life Trustees Limited 中國人壽信託有限公司	29 / 07 / 2024	https://empf.org.hk/pics_chinalife
Fidelity Retirement Master Trust 富達退休集成信託	HSBC Provident Fund Trustee (Hong Kong) Limited	30 / 12 / 2025	https://empf.org.hk/pics_hsbcfd
Haitong MPF Retirement Fund 海通 MPF 退休金			https://empf.org.hk/pics_hsbcht
Hang Seng Mandatory Provident Fund - SuperTrust Plus 恒生強積金智選計劃		29 / 01 / 2026	https://empf.org.hk/pics_hsbchs
HSBC Mandatory Provident Fund - SuperTrust Plus 滙豐強積金智選計劃			https://empf.org.hk/pics_hsbchb
Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃	Manulife Provident Funds Trust Company Limited 宏利公積金信託有限公司	06 / 11 / 2025	https://empf.org.hk/pics_manl

友邦機密及專利資料。嚴禁分發。

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Personal Information Collection Statement of The Onboarded MPF Schemes 已轉移至積金易平台的強積金計劃收集個人資料聲明			
Scheme Name 計劃名稱	**Trustee Name 受託人名稱**	**Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日／月／年)**	**Link / QR Code 連結／二維碼**
Manulife RetireChoice (MPF) Scheme 宏利退休精選（強積金）計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025	https://empf.org.hk/pics_bctrc
MASS Mandatory Provident Fund Scheme 萬全強制性公積金計劃	YF Life Trustees Limited 友通信託有限公司	26 / 06 / 2024	https://empf.org.hk/pics_yflife
My Choice Mandatory Provident Fund Scheme 我的強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025	https://empf.org.hk/pics_bocimc
Principal MPF – Simple Plan 信安強積金 – 易富之選	Principal Trust Company (Asia) Limited 信安信託（亞洲）有限公司	07 / 05 / 2025	https://empf.org.hk/pics_prinsp
Principal MPF – Smart Plan 信安強積金 – 明智之選			https://empf.org.hk/pics_prinsm
Principal MPF Scheme Series 800 信安強積金計劃 800 系列			https://empf.org.hk/pics_prins8
SHKP MPF Employer Sponsored Scheme 新地強積金僱主管辦計劃	Standard Chartered Trustee (Hong Kong) Limited 渣打信託（香港）有限公司	02 / 10 / 2024	https://empf.org.hk/pics_sc
Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	Sun Life Trustee Company Limited 永明信託有限公司	03 / 10 / 2025	https://empf.org.hk/pics_sun

友邦機密及專利資料。嚴禁分發。

填寫轉移申請表格之常見錯誤

文件類型	常見錯誤
成員資金轉移申請表-計劃成員資金轉移申請表、計劃成員整合個人賬戶申請表、僱員自選安排-轉移選擇表格、計劃成員可扣稅自願性供款轉移申請表	• 表格中填寫的資料不完整不正確 • 轉移表格頁數不完整 • 欠缺計劃編號/欠缺新計劃名稱/ 受託人名稱 • 原計劃名稱/受託人名稱不正確 • 欠缺原計劃成員帳戶編號 • 欠缺AIA計劃成員帳戶編號 • 聲明部分中的資料不正確/不完整 • 中介人編號編號不正確 • 中介人名稱不完整

友邦機密及專利資料。嚴禁分發。

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計劃成員可扣稅自願性供款轉移申請表- P(T)範例

友邦機密及專利資料。嚴禁分發。

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eMPF 積金易

表格用途：
轉移可扣稅自願性供款賬戶權益到自選計劃的可扣稅自願性供款賬戶

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

eMPF Web Portal 積金易網上平台

Internal use only 內部專用

eMPF Received Date:

P(T)

SCHEME MEMBER'S REQUEST FOR TRANSFER OF TAX DEDUCTIBLE VOLUNTARY CONTRIBUTIONS (TVC) [FORM MPF(S) – P(T)] (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)

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] (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)

P(T)

Sections 149A and 149B of the Mandatory Provident Fund Schemes (General) Regulation (Cap. 485A)
《強制性公積金計劃 (一般) 規例》(第 485A 章) 第 149A 及 149B 條

Important Notes 重要事項：

1. eMPF Platform Company Limited ("eMPF Company"), a wholly owned subsidiary of the Mandatory Provident Fund Schemes Authority ("MPFA"), will provide the scheme administration services to you through the eMPF Platform, subject to the "General Terms and Conditions of the eMPF Platform" which can be accessed from https://empf.org.hk/tnc/en. This form is only applicable to the new MPF scheme which has got onboard to the eMPF Platform. For details, please refer to the Appendix B: List of "Personal Information Collection Statement" ("PICS") of The eMPF Platform and The Onboarded MPF Schemes. If new MPF scheme has not yet got onboard to the eMPF Platform, please complete the relevant transfer form provided by the new trustee. 積金易平台有限公司 (「積金易公司」) 是強制性公積金計劃管理局 (「積金局」) 的全資附屬公司，積金易公司將根據「積金易平台一般條款及細則」(可於 https://empf.org.hk/tnc/en 瀏覽)，透過積金易平台為你提供計劃行政服務。本表格只適用於已轉移至積金易平台的強積金計劃。詳情請參閱附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》(「聲明」) 列表。如新強積金計劃尚未轉移至積金易平台，請填寫由新受託人提供的相關轉移表格。

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

2. Please read the Explanatory Notes and Guide to Transfer of MPF Accrued Benefits ("Benefits") of Tax Deductible Voluntary Contributions before you complete this form. 填寫本表格前，請先閱讀註釋及轉移可扣稅自願性供款的強積金累算權益 (「權益」) 指南。
3. Please complete this form in BLOCK LETTERS with black or blue pen and tick the appropriate box(es). Please countersign beside any amendment. 請用黑色或藍色筆以正楷填寫本表格，並在適當空格內填上剔號。如有更改，請於更改位置旁加簽。
4. The signature (including countersign) in this form should match with the signature specimen of the original account. 本表格的簽署 (包括加簽) 必須與原帳戶的簽署樣式相符。
5. The eMPF Platform will process this request upon receipt of this completed form and all relevant supporting document(s) (if any). If there are any omissions (including but not limited to missing page(s) / supporting document(s)), the eMPF Platform may not be able to process this request. 積金易平台收到完整表格及相關證明文件 (如有) 後，才會處理有關指示。如有遺漏 (包括但不限於頁數／證明文件不齊全)，積金易平台可能未能執行此指示。
6. If (i) mobile phone no., (ii) email address and / or (iii) correspondence address of the scheme member provided in this form is different from the records of the eMPF Platform AND the signature in this form matches with the signature specimen of the original account, the eMPF Platform will update those information to the original member account as indicated in the form. 如計劃成員在本表格提供的 (i) 手提電話號碼、(ii) 電郵地址及／或 (iii) 通訊地址與積金易平台的紀錄不同，而本表格上的簽署與原帳戶的簽署樣式相符，積金易平台便會更新該資料至本表格所指示的原有成員帳戶。
7. 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 MPFA. 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，包括積金局。
8. The information provided in this form will be used in accordance with the relevant MPF legislation and for the purposes mentioned in the PICS of the eMPF Platform and the Schemes referred / listed in Part B and C below. For details, please refer to the Appendix B. 本表格所有已提供的資料將按照有關強積金法例、積金易平台及下列 B 及 C 部分所指／所列計劃「聲明」處理。詳情請參閱附錄 B。

A. SCHEME MEMBER'S DETAILS 計劃成員資料

(1) Name [Note 1] 姓名 [#1] (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同)

Surname in English 英文姓氏: CHAN

Given Name in English 英文名字: TAI MAN ("the Member")

Name in Chinese 中文姓名: (Surname 姓氏) 陳 (Given Name 名字) 大文 (「成員」)

(2) Identification 身分證明

☑ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼: Y1234567

(3) Contact Details 聯絡資料

(i) Mobile Phone No. 手提電話號碼: 852 (Country / Area Code [#] 國家／地區編號 [#]) 62342345 [#] SMS (if applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊 (如適用) 只發送至香港手提電話號碼。如未有提供國家／地區編號，將預設為「香港 (852)」。

(ii) Daytime Phone No. / Secondary Telephone No. 日間聯絡電話號碼／第二聯絡電話號碼: (Country / Area Code [#] 國家／地區編號 [#])

友邦機密及專利資料。嚴禁分發。

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(iii) Email Address 電郵地址 (If any 如有) chantaiman123@gmail.com

(4) Correspondence Address 通訊地址 (Please provide either English OR Chinese address 請提供英文或中文地址)

Flat / Room 單位／室: C
Floor 層數: 30
Block 座: 2
Building / Estate 大廈／屋苑: 開心大廈
Street (Street No. and Street Name) 街道 (街號及街道名稱): 開心路10號
District Area 區域: 上環

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City * 城市 *
Country * / Region * 國家 * ／地區 *
Postal code * 郵政編號 *

* Applicable to address outside Hong Kong only 只適用於香港以外地址

此部分是填寫原計劃的資料 (轉出資金)

B. ORIGINAL SCHEME INFORMATION OF THE TVC ACCOUNT 可扣稅自願性供款帳戶所屬原計劃的資料

TVC account details of Original Scheme Note 2 & * 原計劃 註 2 及 * 可扣稅自願性供款帳戶資料

Name of Original Scheme Note 2 & * 原計劃名稱 註 2 及 *: XXXX計劃

* Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃列表

此部分是填寫AIA計劃的資料 (轉入資金)

C. NEW SCHEME INFORMATION OF THE TVC ACCOUNT 可扣稅自願性供款帳戶所屬新計劃的資料

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

Name of New Scheme Note 3 & * 新計劃名稱 註 3 及 *: 友邦強積金優選計劃

* Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃列表

D. AUTHORIZATION AND DECLARATION 授權及聲明

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

1. I hereby give consent to the trustee of New Scheme, the eMPF Platform 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. 本人同意，新計劃的受託人、積金易平台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。
2. I have read and understood the General Terms and Conditions of the eMPF Platform, the Important Notes, the Explanatory Notes, the Guide to Transfer of MPF Accrued Benefits ("Benefits") of Tax Deductible Voluntary Contributions and the PICS of the eMPF Platform and the Schemes listed in Part B and C, and have voluntarily elected to transfer my benefits in accordance with this form. 本人已閱讀及明白積金易平台一般條款及細則、重要事項、註釋、轉移可扣稅自願性供款的強積金累算權益 (「權益」)指南及積金易平台及於 B 及 C 部分所列計劃「聲明」的內容，並自願選擇按照本表格轉移權益。
3. I hereby give the eMPF Platform / the trustee of the Original Scheme an instruction to terminate my TVC account in the Original Scheme as referred to in Part B upon transfer of all benefits to the New Scheme and there is no residual balance in the said account. 本人謹此指示積金易平台／原計劃的受託人，在把本人於 B 部分提供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。
4. To the best of my knowledge and belief, the information given in this form is correct and complete. 盡本人所知所信，本表格所提供的資料均屬正確無誤且無缺漏。

Signature of Member Note 4 成員簽署 註 4	Date 日期
Peter Chan	31 / 10 / 2025 DD 日 / MM 月 / YYYY 年

友邦機密及專利資料。嚴禁分發。

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Form Submission 遞交表格		
Transfer Option 轉移選擇	If the new scheme has got onboard to the eMPF Platform ▲ 如新計劃已轉移至積金易平台 ▲	If the new scheme has NOT got onboard to the eMPF Platform 如新計劃尚未轉移至積金易平台
Transfer benefits to the new scheme ▽ 把權益轉移至新計劃 ▽	The eMPF Platform 積金易平台	New Trustee 新受託人

▲ For onboarded schemes, please refer to Appendix B: List of "Personal Information Collection Statement" ("PICS") of The eMPF Platform and The Onboarded MPF Schemes. 就有關已轉移的強積金計劃，請參閱附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》（「聲明」）列表 。

▽ If you need to submit the form to the eMPF Platform, please refer to the eMPF Platform Submission Channels listed below; if you need to submit the form to the new trustee, please contact the new trustee for submission arrangement. 如你需遞交表格予積金易平台，請參閱下列積金易平台遞交途徑；如你需遞交表格予新受託人，請聯絡新受託人查詢遞交安排。

Submission Channels 遞交途徑

1. Post: PO Box 98929 Tsim Sha Tsui Post Office
   郵寄：尖沙咀郵政局郵政信箱 98929 號
2. Drop-in Box in any one of the eMPF Service Centres below
   下列任何一間積金易服務中心的投遞箱
3. Email address 電郵地址 : forms@support.empf.org.hk
4. Fax 傳真 : 3197 2988

Please do **NOT** submit duplicate copies to avoid duplication.
請勿遞交相同表格，以免重複。

Enquiries 查詢

1. eMPF Customer Service Hotline 積金易客戶服務熱線 : 183 2622
2. Email address 電郵地址 : enquiry@support.empf.org.hk
3. Fax 傳真 : 3197 2922

eMPF Service Centres Address & Service Hours 積金易服務中心地址及服務時間

Hong Kong Island 香港島	Kowloon 九龍	New Territories 新界
Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong 香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室	Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon 九龍尖沙咀東部麼地道 77 號華懋廣場 12 樓 1205-6 室	Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories 新界荃灣楊屋道 8 號如心廣場第 2 座 18 樓 1802A 室

Service Hours 服務時間 :

Monday to Friday	星期一至五	9:00 am – 6:00 pm	上午 9 時 至 下午 6 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

eMPF Customer Service Hotline Service Hours 積金易客戶服務熱線服務時間

Monday to Friday	星期一至五	9:00 am – 7:00 pm	上午 9 時 至 下午 7 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

MPF INTERMEDIARY DETAILS 強積金中介人資料 (For MPF Intermediary Use Only 只供強積金中介人填寫)

Intermediary Name 1 中介人名稱 1 : Wong Man Kit	Intermediary Name 2 中介人名稱 2 :
MPF Registration No. 強積金註冊編號 : 123456	MPF Registration No. 強積金註冊編號 :
Agent / Broker Code. 經紀／代理人編號 : A0001	Agent / Broker Code. 經紀／代理人編號 :

!!!重要提示!!!

如使用此積金易表格，需額外提交友邦強積金客戶聲明及同意書至AIA
此申請表格及簽名核實證明文件（SV）則提交至積金易平台

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EXPLANATORY NOTES 註釋

1. If you do NOT possess a HKID Card, please fill in your name as shown on your passport. 如你沒有香港身份證，請填上你在護照上的姓名。
2. The transfer election may not be processed if the name of Original Scheme is not provided or is incorrect. This information can be found in your notice of participation or annual benefit statement issued by the eMPF Platform / the original trustee. If you are in doubt, please contact the eMPF Platform / the original trustee. 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。你可透過積金易平台／原受託人發出的參與通知或周年權益報表獲取有關資料。如有疑問，請聯絡積金易平台／原受託人。
3. The transfer election may not be processed if the name of New Scheme is not provided or is incorrect. If you are in doubt, please contact the eMPF Platform / the new trustee. 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，請聯絡積金易平台／新受託人。
4. The signature must be the same as your signature specimen previously given to the eMPF Platform / the original trustee. Please note that the transfer may not be processed if the signature provided in this form does not match your signature specimen previously given to the eMPF Platform / the original trustee. If you are in doubt, please contact the eMPF Platform / the original trustee. 你的簽署必須與你之前給予積金易平台／原受託人的簽署樣式相符。請注意，若本表格上的簽署與你之前給予你積金易平台／原受託人的簽署樣式不符，有關轉移或不獲處理。如有疑問，請聯絡積金易平台／原受託人。

GUIDE TO TRANSFER OF MPF ACCRUED BENEFITS ("BENEFITS") OF TAX DEDUCTIBLE VOLUNTARY CONTRIBUTIONS 轉移可扣稅自願性供款的強積金累算權益（「權益」）指南

1. Definition of terms 用詞定義：
   - (i) "Tax Deductible Voluntary Contributions" ("TVC") 「可扣稅自願性供款」 – refer to contributions that are paid into a TVC account under section 11A of the Mandatory Provident Fund Schemes Ordinance ("the Ordinance"). 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。
   - (ii) "TVC account" 「可扣稅自願性供款帳戶」 – 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. 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。
   - (iii) "Original Scheme" 「原計劃」 – the scheme from which your benefits are to be transferred. 指轉出你的權益的計劃。
   - (iv) "New Scheme" 「新計劃」 – the scheme to which your benefits are to be transferred. 指轉入你的權益的計劃。
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. 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. After your benefits held in the TVC account are transferred from the Original Scheme, your TVC account in the Original Scheme will be terminated. 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。

Reminders before making an election to transfer 作出轉移選擇前的注意事項

4. Before you decide to transfer your benefits to another scheme, you should take into consideration your personal needs and the following factors: 在你決定把權益轉移至另一個計劃前，你應考慮你的個人需要及以下因素：
   - (i) services of the trustee (e.g. frequency of issuance of benefit statement to scheme members; number of free fund switchings per year); 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）；
   - (ii) fees and charges of the funds (for detailed information, please refer to the website of the MPFA); 基金的收費（詳情請參閱積金局網頁）；
   - (iii) the range of fund choices offered by the schemes and in particular whether there are funds available that match what you need; and 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
   - (iv) 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. 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。

   Please check the MPF Scheme Brochure and the Key Scheme Information Document ("KSID") of the Original Scheme, which can be found on the website of the MPFA or consult the eMPF Platform / the original trustee for details. 有關詳情請查閱原計劃的強積金計劃說明書及主要計劃資料文件，該文件可於積金局的網頁下載，或向積金易平台／原受託人查詢。
5. 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 MPF Scheme Brochure and the KSID of the New Scheme, which can be found on the website of the MPFA or contact the eMPF Platform / the trustee of New Scheme. 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，請查閱新計劃的強積金計劃說明書及主要計劃資料文件，該文件可於積金局的網頁下載，你也可向積金易平台／新計劃的受託人查詢詳情。
6. 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 eMPF Platform / the new trustee. Please consult the eMPF Platform / the new trustee for the procedures and required documents for setting up a TVC account. 請確保你在新計劃已開立可扣稅自願性供款帳戶。否則，你在遞交本表格之時或在此之前，須向積金易平台／新受託人遞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，請向積金易平台／新受託人查詢。
7. 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 investment mandate of selected MPF account. In the below events, the transferred-in benefits will be invested in the default investment strategy (DIS) if you either: 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，轉入權益將會根據已選擇的強積金帳戶的投資授權進行投資。如就下列情況，轉入權益將會根據預設投資策略進行投資，如你：
   - (i) do not give or have not given any investment instructions for the account in the New Scheme to the eMPF Platform / the trustee; or 沒有或尚未就有關新計劃的帳戶向積金易平台／受託人給予任何投資指示；或
   - (ii) have given invalid investment instructions for the account in the New Scheme. 就有關新計劃的帳戶給予無效的投資指示。

   Please approach the eMPF Platform / the 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 eMPF Platform / the trustee. 如有需要，請向積金易平台／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，請聯絡積金易平台／受託人。

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8. 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 eMPF Platform / the trustee shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Ordinance. Please contact the eMPF Platform / the trustee if you wish to know the details of how the eMPF Platform / the trustee handles these transactions. 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。如積金易平台／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，積金易平台／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轉移權益的次序。如欲瞭解積金易平台／受託人如何處理該等交易，請與積金易平台／受託人聯絡。

9. 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 eMPF Platform / The trustee of 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 eMPF Platform / The trustee of New Scheme will subscribe fund units of the New Scheme 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". 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。積金易平台／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。積金易平台／新計劃的受託人會按照你的指示於新計劃買入基金單位，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。

10. If you wish to transfer-out the benefits from more than one schemes, you should submit a separate Form MPF(S)-P(T) for each of TVC accounts. 如欲從多於一個帳戶轉出權益，請就每個可扣稅自願性供款帳戶分別遞交一份第 MPF(S)-P(T) 號表格。

11. To transfer TVC accrued benefits across different MPF schemes, all existing unit holdings in the existing member account will be redeemed. The redemption proceeds will be reinvested in accordance with the latest investment mandate of the chosen member account. 於不同強積金計劃轉移可扣稅自願性供款，現有成員帳戶內所有持有單位將被贖回，該贖回款項將根據所選擇的成員帳戶的最新投資授權再作投資。

12. **Please DO NOT sign on a blank form.** After the completed election form has been received by the eMPF Platform / the trustee, the administration procedures taken by the eMPF Platform / the trustee may not be reversible. **請勿在空白的表格上簽署。**在積金易平台／受託人收到已填妥的選擇表格後，之前由積金易平台／受託人採取的行政步驟未必能夠撤銷。

13. If any information provided on Form MPF(S)-P(T) (including the signature) is incorrect or incomplete, the eMPF Platform may not be able to process your benefit transfer request. 若你在第 MPF(S)-P(T) 號表格上提供的任何資料（包括簽署）不正確或不完整，積金易平台可能無法處理你的權益轉移要求。

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

Enquiries 查詢

15. Information about a scheme is set out in the MPF Scheme Brochure and the KSID of the scheme, which can be found on the website of the MPFA (www.mpfa.org.hk). This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the eMPF Platform for enquiries about account details or contact the relevant trustee(s) via their website(s) / hotline(s) for schemes or funds details. 計劃的強積金計劃說明書及主要計劃資料文件載有該計劃的資料，該文件可於積金局（www.mpfa.org.hk）的網頁下載，這些資料將有助你決定是否把權益轉移至該計劃。請透過積金易平台查詢帳戶詳情或透過相關受託人網頁／熱線聯絡受託人以查詢計劃或基金的資料。

16. If you wish to make enquiries or seek assistance in relation to your election to transfer benefit, please contact the eMPF Platform (for the scheme has got onboard to the eMPF Platform) or the trustee(s) (for the scheme has not got onboard to the eMPF Platform). 如欲就你的權益轉移申請作出查詢或尋求協助，請聯絡積金易平台（計劃已轉移至積金易平台適用）或受託人（計劃尚未轉移至積金易平台適用）。

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APPENDIX A: LIST OF MPF SCHEMES 附錄 A: 強積金計劃列表

Scheme Name 計劃名稱	Trustee Name 受託人名稱	Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日／月／年)
AIA MPF - Prime Value Choice 友邦強積金優選計劃	AIA Company (Trustee) Limited 友邦（信託）有限公司	03 / 09 / 2025
AMTD MPF Scheme AMTD 強積金計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025
BCOM Joyful Retirement MPF Scheme 交通銀行愉盈退休強積金計劃	Bank of Communications Trustee Limited 交通銀行信託有限公司	03 / 09 / 2024
BCT (MPF) Industry Choice BCT（強積金）行業計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	Details to be announced 詳情稍後公佈
BCT (MPF) Pro Choice BCT 積金之選		01 / 08 / 2025
BCT Strategic MPF Scheme BCT 強積金策略計劃		03 / 07 / 2025
BEA (MPF) Industry Scheme 東亞（強積金）行業計劃	Bank of East Asia (Trustees) Limited 東亞銀行（信託）有限公司	Details to be announced 詳情稍後公佈
BEA (MPF) Master Trust Scheme 東亞（強積金）集成信託計劃		05 / 03 / 2025
BEA (MPF) Value Scheme 東亞（強積金）享惠計劃		29 / 10 / 2024
BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme 中銀保誠簡易強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025
China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃	China Life Trustees Limited 中國人壽信託有限公司	29 / 07 / 2024
Fidelity Retirement Master Trust 富達退休集成信託	HSBC Provident Fund Trustee (Hong Kong) Limited	30 / 12 / 2025
Haitong MPF Retirement Fund 海通 MPF 退休金		
Hang Seng Mandatory Provident Fund - SuperTrust Plus 恒生強積金智選計劃		29 / 01 / 2026
HSBC Mandatory Provident Fund - SuperTrust Plus 滙豐強積金智選計劃		
Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃	Manulife Provident Funds Trust Company Limited 宏利公積金信託有限公司	06 / 11 / 2025
Manulife RetireChoice (MPF) Scheme 宏利退休精選（強積金）計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025
MASS Mandatory Provident Fund Scheme 萬全強制性公積金計劃	YF Life Trustees Limited 萬通信託有限公司	26 / 06 / 2024
My Choice Mandatory Provident Fund Scheme 我的強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025
Principal MPF – Simple Plan 信安強積金 – 易富之選	Principal Trust Company (Asia) Limited 信安信託（亞洲）有限公司	07 / 05 / 2025
Principal MPF – Smart Plan 信安強積金 – 明智之選		
Principal MPF Scheme Series 800 信安強積金計劃 800 系列		
SHKP MPF Employer Sponsored Scheme 新地強積金僱主贊辦計劃	Standard Chartered Trustee (Hong Kong) Limited 渣打信託（香港）有限公司	02 / 10 / 2024
Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	Sun Life Trustee Company Limited 永明信託有限公司	03 / 10 / 2025

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APPENDIX B: LIST OF "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE ONBOARDED MPF SCHEMES
附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《收集個人資料聲明》(「聲明」)列表

Below are the PICS of the eMPF Platform and the onboarded MPF schemes. Please download and read the PICS of the eMPF Platform and the onboarded MPF scheme(s) via visiting the website of the eMPF Platform or scanning respective QR code. Alternatively, you may also get a copy of the PICS by calling eMPF Customer Service Hotline 183 2622 or visiting any one of the eMPF Service Centres. For MPF scheme(s) which has / have not got onboard, please contact the relevant trustee(s) for the PICS of the relevant scheme(s). 下列為積金易平台及已轉移至積金易平台的強積金計劃的「聲明」。請瀏覽積金易平台的網頁或掃描相關二維碼下載及詳閱積金易平台及已轉移至積金易平台的強積金計劃「聲明」。你亦可致電積金易客戶服務熱線 183 2622 或到訪任何一間積金易服務中心索取「聲明」副本。就尚未轉移至積金易平台的強積金計劃，請聯絡有關受託人索取相關計劃的「聲明」。

Personal Information Collection Statement of The eMPF Platform 積金易平台收集個人資料聲明			Link / QR Code 連結／二維碼
The eMPF Platform 積金易平台			https://empf.org.hk/picsen
Personal Information Collection Statement of The Onboarded MPF Schemes 已轉移至積金易平台的強積金計劃收集個人資料聲明			
Scheme Name 計劃名稱	**Trustee Name 受託人名稱**	**Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日／月／年)**	**Link / QR Code 連結／二維碼**
AIA MPF - Prime Value Choice 友邦強積金優選計劃	AIA Company (Trustee) Limited 友邦（信託）有限公司	03 / 09 / 2025	https://empf.org.hk/pics_aia
AMTD MPF Scheme AMTD 強積金計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025	https://empf.org.hk/pics_bctad
BCOM Joyful Retirement MPF Scheme 交通銀行愉盈退休強積金計劃	Bank of Communications Trustee Limited 交通銀行信託有限公司	03 / 09 / 2024	https://empf.org.hk/pics_bocom
BCT (MPF) Pro Choice BCT 積金之選	Bank Consortium Trust Company Limited 銀聯信託有限公司	01 / 08 / 2025	https://empf.org.hk/pics_bctpc
BCT Strategic MPF Scheme BCT 強積金策略計劃		03 / 07 / 2025	https://empf.org.hk/pics_bctsg
BEA (MPF) Master Trust Scheme 東亞（強積金）集成信託計劃	Bank of East Asia (Trustees) Limited 東亞銀行（信託）有限公司	05 / 03 / 2025	https://empf.org.hk/pics_beamt
BEA (MPF) Value Scheme 東亞（強積金）享惠計劃		29 / 10 / 2024	https://empf.org.hk/pics_bea
BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme 中銀保誠簡易強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025	https://empf.org.hk/pics_bocier
China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃	China Life Trustees Limited 中國人壽信託有限公司	29 / 07 / 2024	https://empf.org.hk/pics_chinalife
Fidelity Retirement Master Trust 富達退休集成信託	HSBC Provident Fund Trustee (Hong Kong) Limited	30 / 12 / 2025	https://empf.org.hk/pics_hsbcfd
Haitong MPF Retirement Fund 海通 MPF 退休金			https://empf.org.hk/pics_hsbcht
Hang Seng Mandatory Provident Fund - SuperTrust Plus 恒生強積金智選計劃		29 / 01 / 2026	https://empf.org.hk/pics_hsbchs
HSBC Mandatory Provident Fund - SuperTrust Plus 滙豐強積金智選計劃			https://empf.org.hk/pics_hsbchb

友邦機密及專利資料。嚴禁分發。

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Personal Information Collection Statement of The Onboarded MPF Schemes 已轉移至積金易平台的強積金計劃收集個人資料聲明			
Scheme Name 計劃名稱	**Trustee Name 受託人名稱**	**Scheme Onboarding Date 計劃轉移日期 (DD / MM / YYYY 日／月／年)**	**Link / QR Code 連結／二維碼**
Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃	Manulife Provident Funds Trust Company Limited 宏利公積金信託有限公司	06 / 11 / 2025	https://empf.org.hk/plcs_manl
Manulife RetireChoice (MPF) Scheme 宏利退休精選（強積金）計劃	Bank Consortium Trust Company Limited 銀聯信託有限公司	03 / 07 / 2025	https://empf.org.hk/plcs_bctrc
MASS Mandatory Provident Fund Scheme 萬全強制性公積金計劃	YF Life Trustees Limited 萬通信託有限公司	26 / 06 / 2024	https://empf.org.hk/plcs_yflife
My Choice Mandatory Provident Fund Scheme 我的強積金計劃	BOCI-Prudential Trustee Limited 中銀國際英國保誠信託有限公司	05 / 06 / 2025	https://empf.org.hk/plcs_bocimc
Principal MPF – Simple Plan 信安強積金 – 易富之選	Principal Trust Company (Asia) Limited 信安信託（亞洲）有限公司	07 / 05 / 2025	https://empf.org.hk/plcs_prinsp
Principal MPF – Smart Plan 信安強積金 – 明智之選			https://empf.org.hk/plcs_prinsm
Principal MPF Scheme Series 800 信安強積金計劃 800 系列			https://empf.org.hk/plcs_prins8
SHKP MPF Employer Sponsored Scheme 新地強積金僱主贊辦計劃	Standard Chartered Trustee (Hong Kong) Limited 渣打信託（香港）有限公司	02 / 10 / 2024	https://empf.org.hk/plcs_sc
Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	Sun Life Trustee Company Limited 永明信託有限公司	03 / 10 / 2025	https://empf.org.hk/plcs_sun

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填寫轉移申請表格之常見錯誤

文件類型	常見錯誤
成員資金轉移申請表-計劃成員資金轉移申請表、計劃成員整合個人賬戶申請表、僱員自選安排-轉移選擇表格、計劃成員可扣稅自願性供款轉移申請表	• 表格中填寫的資料不完整/不正確 • 轉移表格頁數不完整 • 欠缺計劃編號/欠缺新計劃名稱/ 受託人名稱 • 原計劃名稱/受託人名稱不正確 • 聲明部分中的資料不正確/不完整 • 中介人編號編號不正確 • 中介人名稱不完整

友邦機密及專利資料。嚴禁分發。