HEALTHIER, LONGER, BETTER LIVES

僱主開戶

AIA confidential and proprietary information. Not for distribution.

僱主 MPF AIA 開戶流程

僱主參與表格 → 成員 enrollment → 資產轉移 → 遞交客戶聲明書(僱主)

僱主 MPF AIA 操作流程

1. 開戶

• 註冊積金易戶口（需時約 2 天）

https://portal.empf.org.hk/account/reg/employer/instruction

• 同時填妥僱主參與計劃表格 ER
• 提供開戶資料：
1. BR copy
2. CI copy
3. 周年申報表副本 (Annual Return) / 公司組織章程大綱及細則副本(適用於新開公司)
4. 計劃授權人身份證副本, 公司董事身分證副本
5. 董事會決議書

2: 文件遞交：透過Email 交至積金易
Attached ER 連同所有文件至 eMPF
Forms@support.empf.org.hk

3: 遞交僱主聲明同意書（Consent Form）至 AIA consent email
mpfconsent@aia.com

成功開戶後，僱主會收到 AIA 僱主號碼，可遞交成員登記表及銀行自動轉賬表格。

4: 成員登記階段

•員工 Enrollment（成員登記）
遞交成員登記表格 到積金易EMAIL
確保所有成員成功登記

5: 每月供款階段

• 僱主需於每月 10 號前所有員工供款
• 每月填寫並遞交供款結算書
（僱主需每月可登入EMPF 提交 ）

6. 表格下載

積金易文件下載

所有帳戶類型：
https://portal.empf.org.hk/enquiry/usefulForms?lang=zh

僱主：
https://portal.empf.org.hk/enquiry/usefulFormsSelect?userRole=employer5&lang=zh

[AIA - INTERNAL]

常用表格 – （僱主）



[AIA - INTERNAL]

HEALTHIER, LONGER, BETTER LIVES

僱主參與協議

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公司基本資料



eMPF 積金易 | AIA

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 _____ ("Participating Employer")

中文 _____ (「參與僱主」)

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(3) Registration Type 註冊類別

- ☐ (i) (BR) Business Registration [1] 商業登記 [1]
- ☐ (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. [1] 商業／其他註冊證號碼 [1] _____ Branch No. [1] 分行號碼 [1] _____

[1] 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 _____

(ii) Date of Incorporation 註冊日期 __/__/____ DD / MM / YYYY 日／月／年

(iii) Place of Incorporation 註冊地點 _____

(5) Organisation Type 機構類別

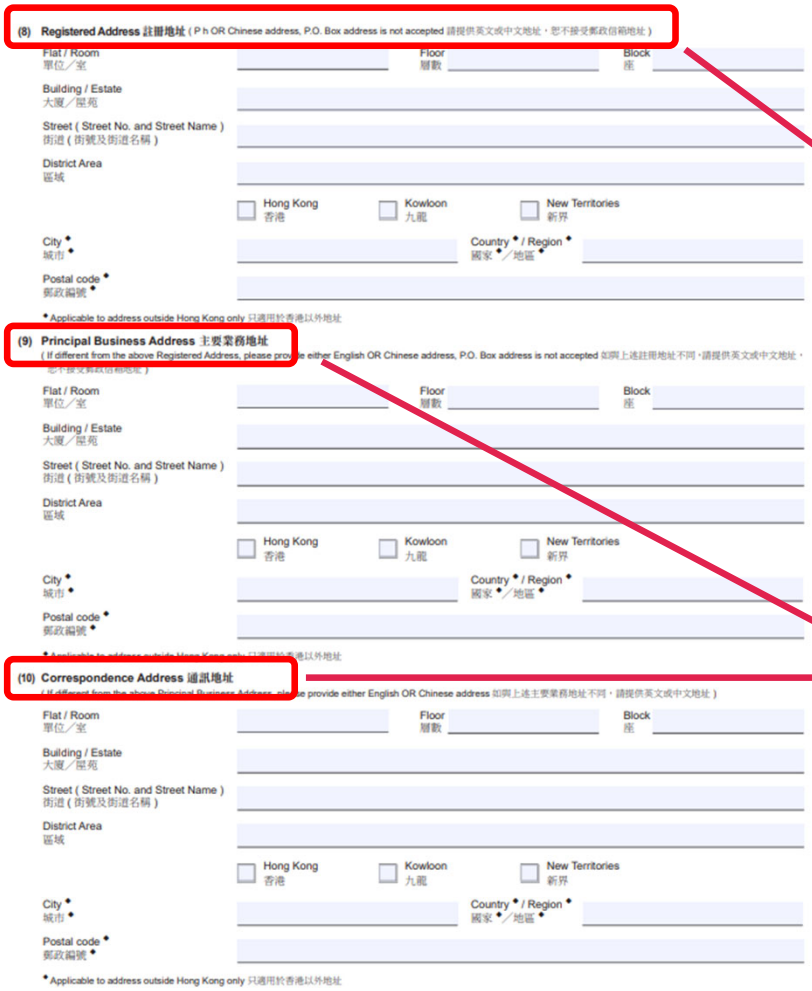
- ☐ (i) Limited Partnership 有限合夥
- ☐ (ii) Partnership 合夥經營
- ☐ (iii) Private Limited Company 私人有限公司
- ☐ (iv) Public Limited Company 公眾有限公司
- ☐ (v) Sole Proprietorship 獨資經營
- ☐ (vi) Others, please specify 其他，請註明 _____

(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) 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 _____

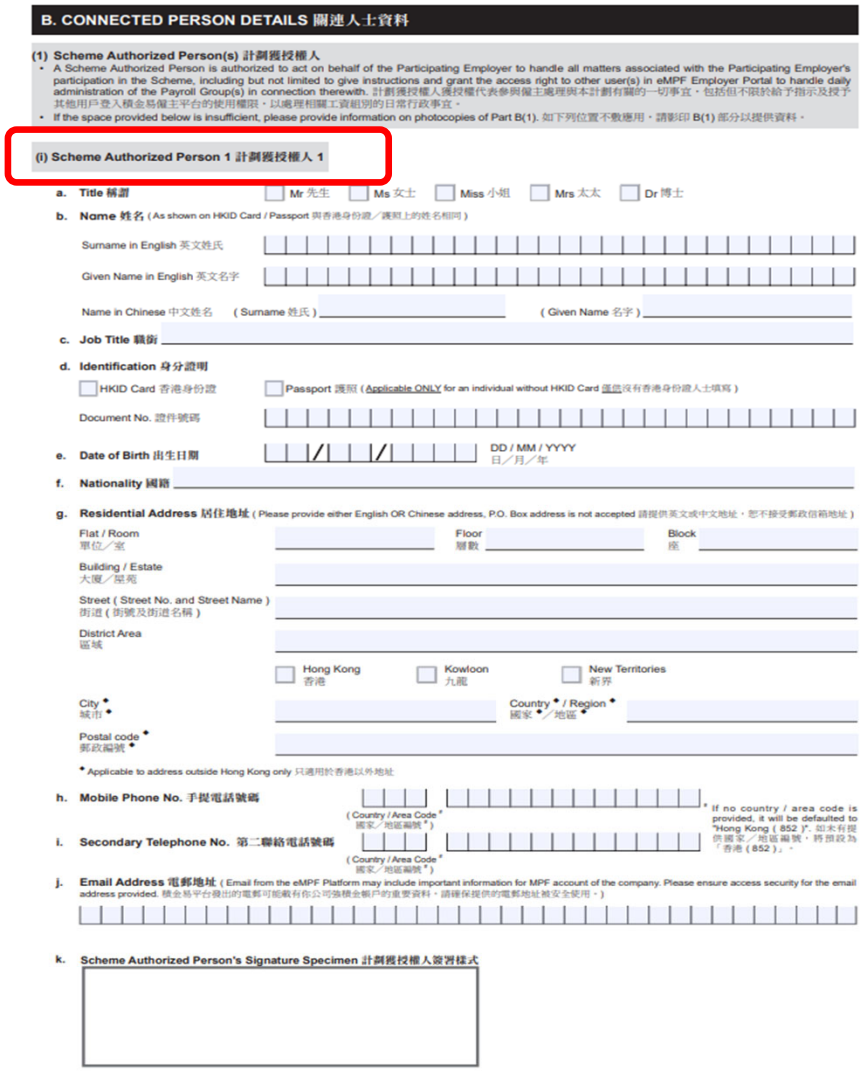
[AIA - INTERNAL]



與BR商業登記證地址相同

如與上述註冊地址不同
否則，毋須填寫

[AIA - INTERNAL]



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積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 of Part B(1). 如下列位置不敷應用，請影印 B(1) 部分以提供資料。

(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

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 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

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。)

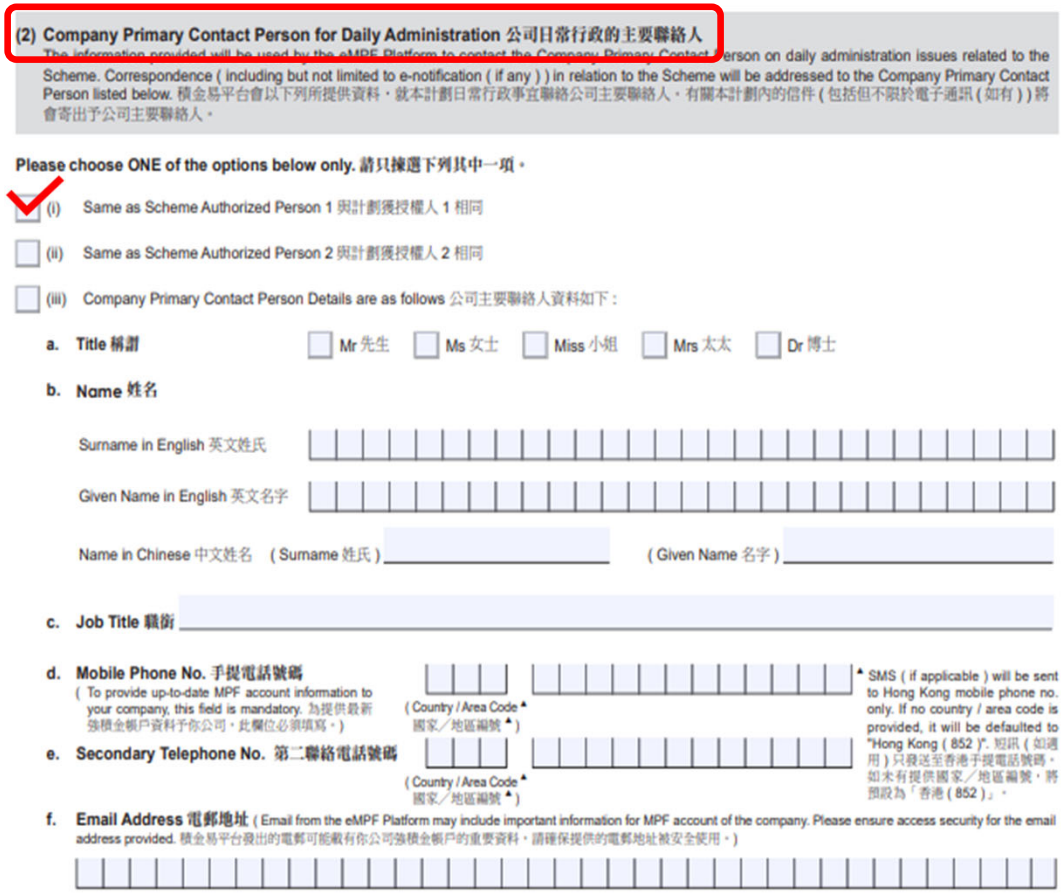
k. **Scheme Authorized Person's Signature Specimen 計劃獲授權人簽署樣式**

計劃獲授權人:

指授權代表參與僱主處理與本計劃有關的一切事宜

如授權人沒有香港身分證, 需親臨積金易服務中心(需預約)

[AIA - INTERNAL]



(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)」。

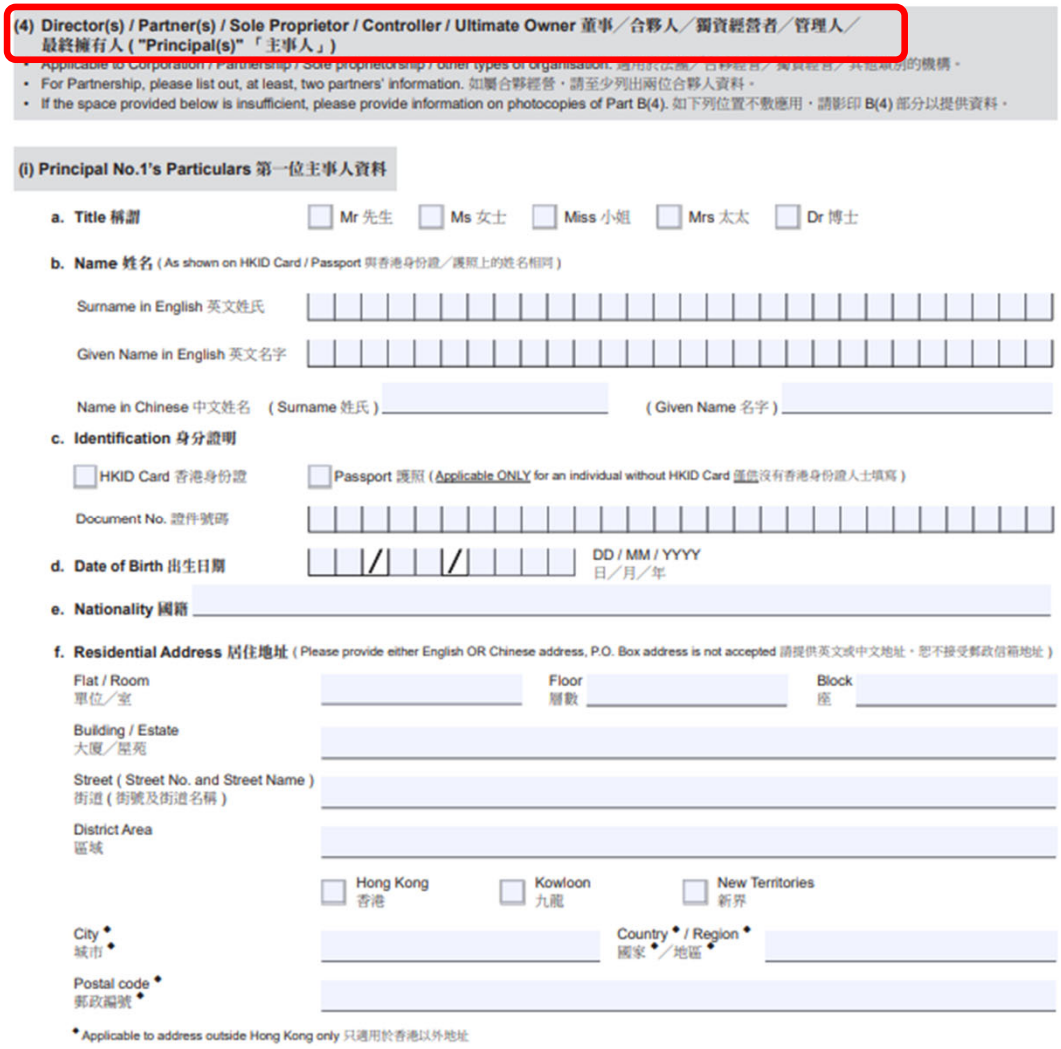
e. **Secondary Telephone No. 第二聯絡電話號碼**
(Country / Area Code ▲ 國家／地區編號 ▲)

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被安全使用。)

公司日常行動的主要聯絡人:

指有關本計劃內的信件將會寄出予主要聯絡人

[AIA - INTERNAL]



(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. 適用於公司／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

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 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 ◆

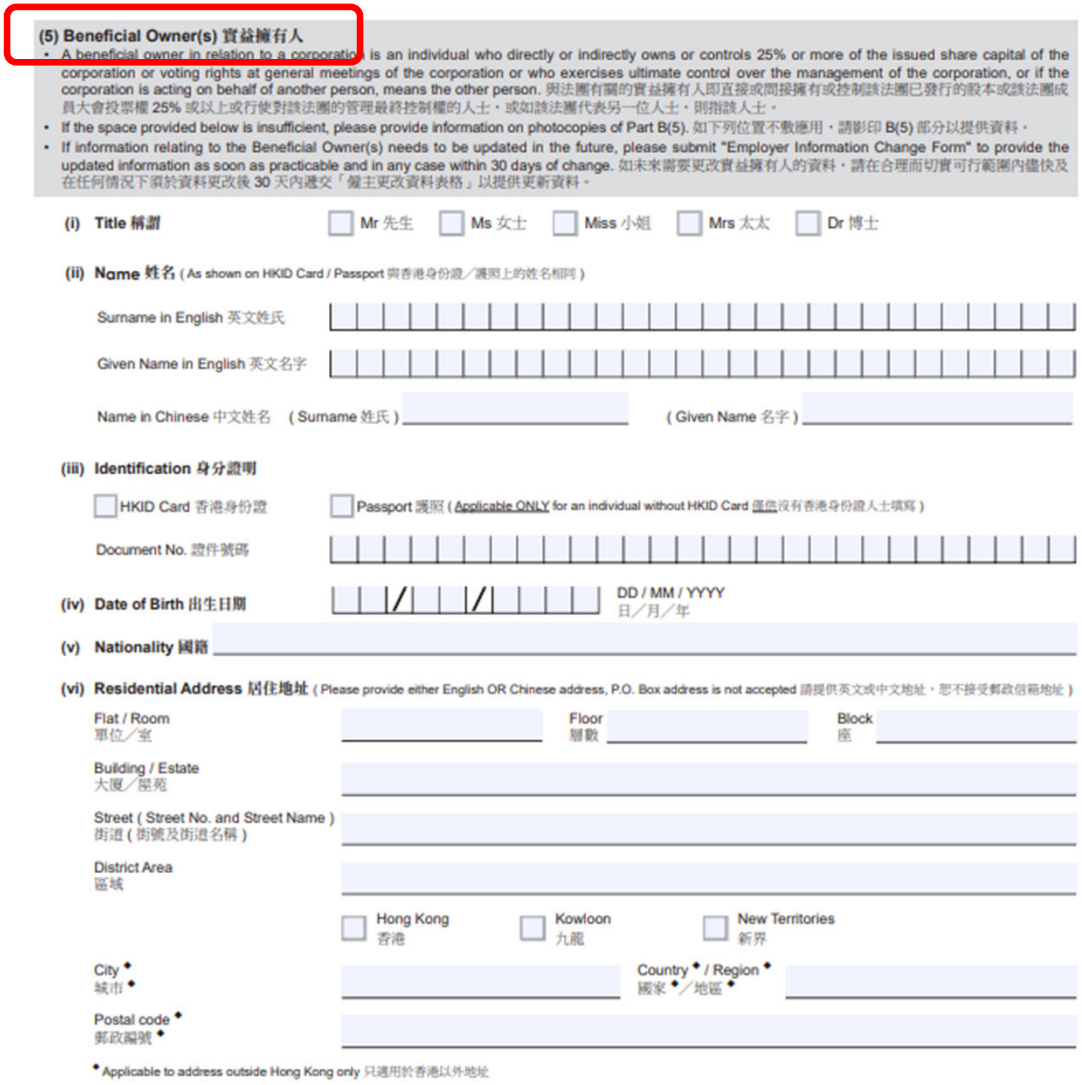
Postal code ◆ 郵政編號 ◆

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

主事人:

董事 / 合伙人 / 獨資經營者

[AIA - INTERNAL]



(5) Beneficial Owner(s) 實益擁有人

- 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

Given Name in English 英文名字

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

(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

(iv) **Date of Birth 出生日期** DD / MM / YYYY 日／月／年

(v) **Nationality 國籍**

(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 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 ◆

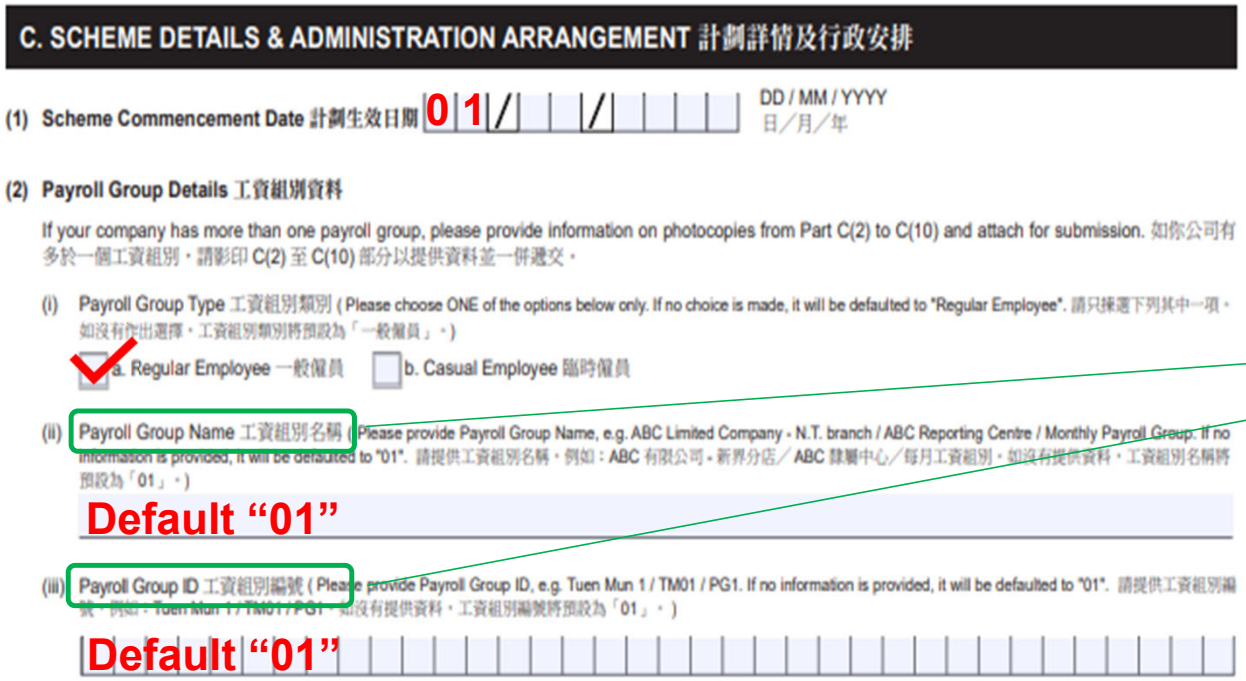
◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

實益擁有人:

指所有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員投票權25%或以上

如有多於一位, 請影印此部分以提供資料

[AIA - INTERNAL]



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/ / 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 be defaulted to "Regular Employee". 請只揀選下列其中一項，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

(ii) Payroll Group Name 工資組別名稱 (Please provide Payroll Group Name, e.g. ABC Limited Company - N.T. branch / ABC Reporting 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 匯報中心／每月工資組別。如沒有提供資料，工資組別名稱將預設為「01」。)

Default “01”

(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」。)

Default “01”

	MPF iPoS	紙本
工資組別名稱	必填	可選填 (預設為”01”)
工資組別編號	必填	可選填 (預設為”01”)

[AIA - INTERNAL]

(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」。)

- ☑ (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 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

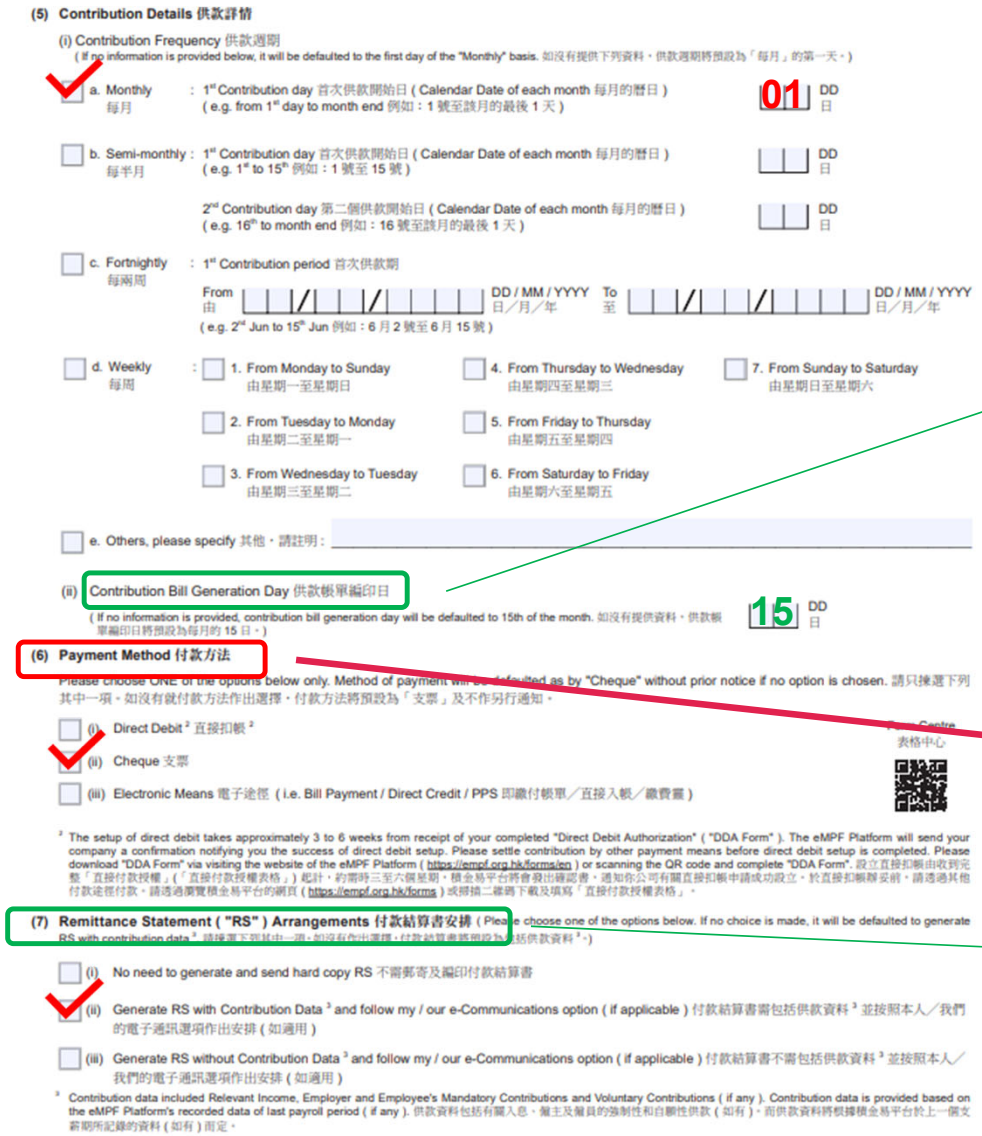
City * 城市 * _____ Country * / Region * 國家 * ／地區 * _____

Postal code * 郵政編號 *

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

如與上述公司通訊地址不同

[AIA - INTERNAL]



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

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，通知你公司有關直接扣帳申請成功設立。於直接扣帳辦妥前，請透過其他付款途徑付款。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」。

(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]。)

(i) No need to generate and send hard copy RS 不需郵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)

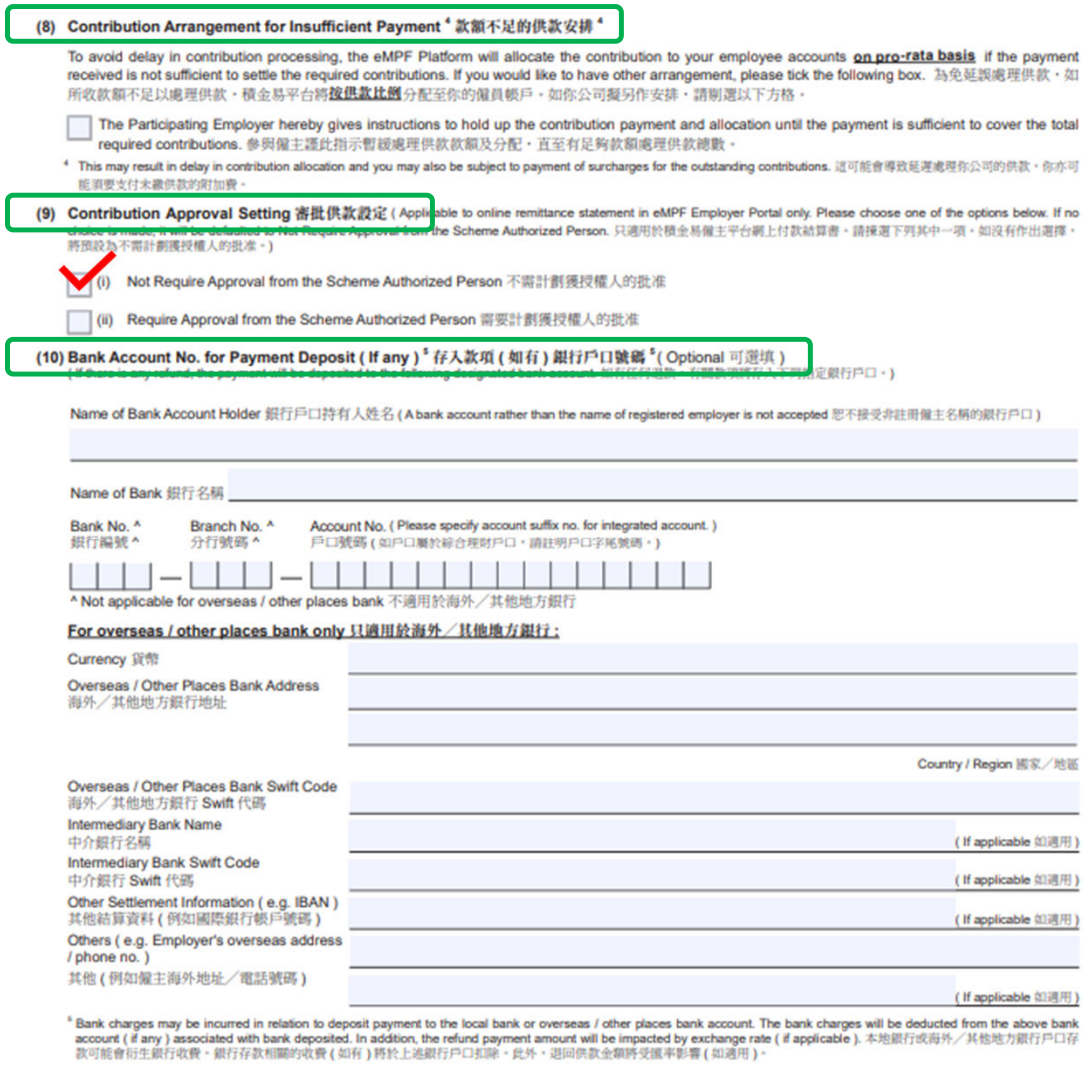
[3] Contribution data included Relevant Income, Employer and Employee's Mandatory Contributions and Voluntary Contributions (if any). Contribution data is provided based on the eMPF Platform's recorded data of last payroll period (if any). 供款資料包括有關入息、僱主及僱員的強制性和自願性供款 (如有)。而供款資料將根據積金易平台於上一個支薪期所記錄的資料 (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

	MPF iPoS	紙本
供款帳單編印日	必填	可選填 (預設為”15”)

MPF iPoS 現時只有”支票”選項

	MPF iPoS	紙本
供款結算書安排	必填	可選填 (預設為”包括供款資料”)

[AIA - INTERNAL]



(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。)

☑ (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，存款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)

Name of Bank 銀行名稱

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。)

^ 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)。

	MPF iPoS	紙本
款額不足安排	可選填 (預設為"安比例分配")	可選填 (預設為"安比例分配")
審批供款設定	必填	可選填 (預設為"不需審批")
存入款項 銀行戶口號碼	必填	可選填

[AIA - INTERNAL]

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。

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。)
- ☐ (ii) Hong Kong (the TIN is as noted in below [8]) and also some other jurisdictions / countries
  香港（其稅務編號如以下所註 [8]）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。)

[AIA - INTERNAL]

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

Please tick one of the appropriate boxes and provide the relevant information. 請在其中一個適當的方格上填上剔號，並提供有關資料。

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) Investment Entity, except an investment entity that is managed 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理 (例如：擁有酌情權管理投資實體的資產) 並位於非參與稅務管轄區的投資實體
Active Non-Financial Entity ("NFE") 主動非財務實體 (Please skip Part E(4) 請略過 E(4) 部分)	☐	(i) NFE the stock of which is regularly traded on _____ , which is an established securities market 該非財務實體的股票經常在 _____ (一個具規模證券市場) 進行買賣
	☐	(ii) Related entity of _____ , the stock of which is regularly 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 _____ (一個具規模證券市場) 進行買賣
	☐	(iii) NFE is a governmental entity, an 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 e.g. Trading
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 financial institution and located in a non-participating jurisdiction 位於非參與稅務管轄區並由另一財務機構管理的投資實體
	☐	(ii) NFE that is not an active NFE 不屬主動非財務實體的非財務實體

[10] Please refer to the definitions of different entity types at https://www.ird.gov.hk/eng/pdf/2016/terms.pdf. 不同實體類別之定義請參考 https://www.ird.gov.hk/chi/pdf/2016/terms.pdf。

公司業務性質

[AIA - INTERNAL]

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被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)

	Name 姓名 (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同) : Capacity ▼ 身分 ▼ : HKID Card / Passport No. 香港身份證／護照號碼 : Nationality 國籍 : Residential Address 住址 : Email Address 電郵地址 :
Date 日期 DD 日 / MM 月 / YYYY 年	

▽ 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相關文件。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。

[AIA - INTERNAL]

僱主強積金戶口轉移所需文件 (公司(有僱員)轉新受託人AIA)

	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	✓

一般有限公司申請

客人填番以下表格:

1. 僱主參與協議 （ERA)
2. 強積金客戶聲名及同意書（只適用於僱主）
3. 成員登記表格
4. 直接付款授權書 (DDA form) (如適用)
   （文件1,3,4係積金易下載，2係MPF eAC下載）

提交文件:

1. 商業登記證 (BR) 副本
2. 公司註冊證書 (CI)副本
3. 最新周年申報表 (Annual Return) 副本 /公司組織章程大綱及細則副本 （適用於新開公司)
4. 計劃獲授權人及主事人HKID COPY
5. 董事會決議書

[AIA - INTERNAL]

董事會決議書範本



| 工具 | 客戶 | 銷售支援 | 競賽 | 銷售成績 | 快訊 | 下載 | 指南 登出

首頁 > 下載 > 表格

計算機 | 列印 | 字體: -A A +A

表格

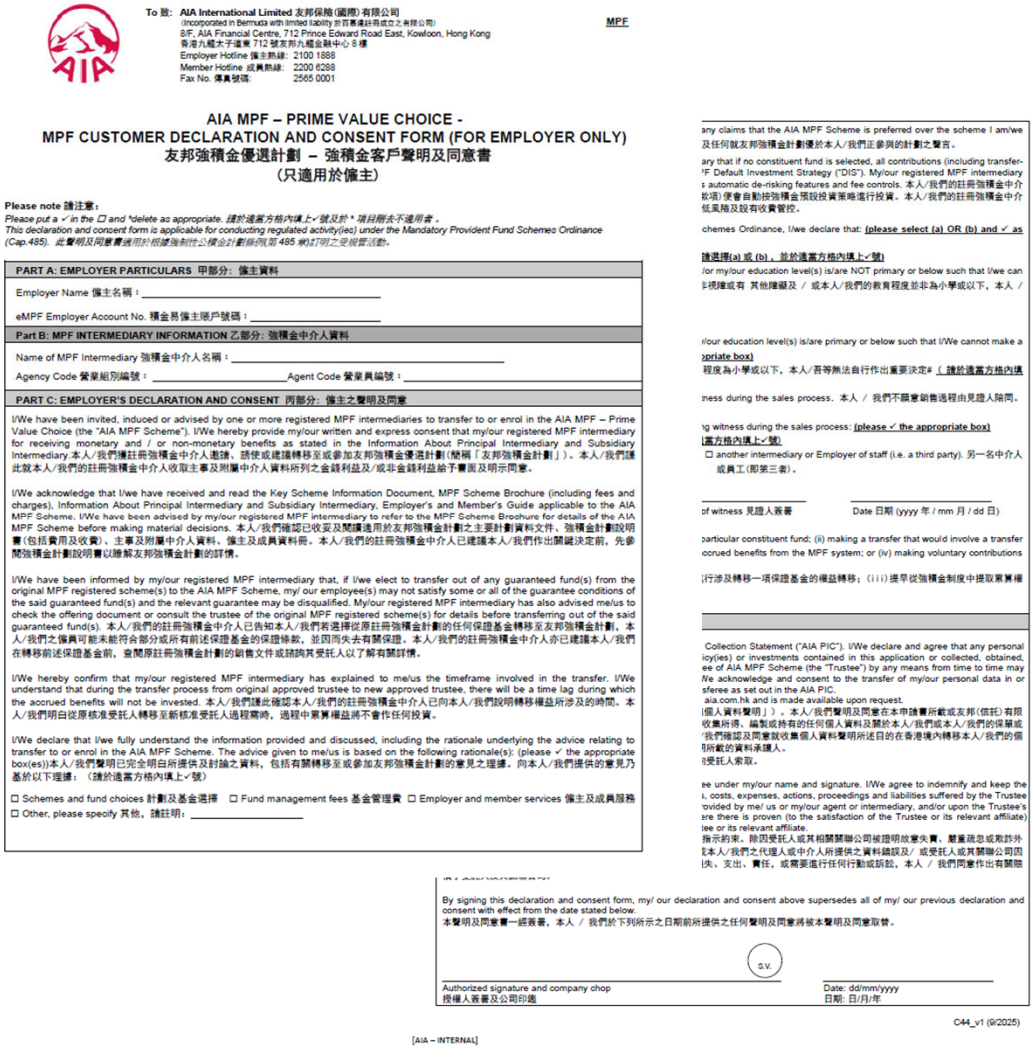
- 友邦強積金新生意所需填寫的表格
- 市場推廣刊物
- 供款計算機
- 用戶指南

Get ADOBE READER 需裝置 Adobe Reader 以閱讀或列印 PDF 格式文件。

強積金 | 公積金 | 澳門退休金 | 澳門央積金 | 個人業務 | 其他

- 僱主申請書
  - 友邦強積金優選計劃 (NEW) (適用於積金易平台)
- 成員登記表格
  - 友邦強積金優選計劃 (NEW) (適用於積金易平台)
- 自僱人士申請書
  - 友邦強積金優選計劃 (NEW) (適用於積金易平台)
- 直接付款授權書
  - 友邦強積金優選計劃 (NEW) (適用於積金易平台)
- 設立僱主自願性供款表格
  - 友邦強積金優選計劃 (NEW) (適用於積金易平台)
- 自僱人士自願性供款申請 / 更改表格 (NEW) (適用於積金易平台)
- 成員自願性供款提取表格 (NEW) (適用於積金易平台)
- 更改投資指示表格 (僱員) (NEW) (適用於積金易平台)
- 付款結算書 (NEW) (適用於積金易平台)
- 成員轉移自獲強積金豁免的職業退休計劃之通知書
- 填寫教學: 友邦強積金優選計劃僱主申請表格 (補充文件)
- 友邦強積金優選計劃僱主申請表格(補充文件)
- 董事會決議書範本 積金易註冊用途
- 友邦強積金優選計劃 – 強積金客戶聲明及同意書 (只適用於僱主)
- 友邦強積金優選計劃 – 強積金客戶聲明及同意書 (只適用於僱員) (for multiple provider case)
- 友邦強積金優選計劃 – 強積金客戶聲明及同意書 (只適用於成員) (retail digital consent form)
- 發放成員賬戶資料授權書 (只適用於強積金僱員成員或自僱人士或休悠樂成員)
- 取消發放成員賬戶資料表格 (只適用於強積金僱員成員或自僱人士或休悠樂成員)
- 中介人委任授權書(只適用於僱主)
- 中介人委任授權書(只適用於成員)
- 簽名核實證明文件(只適用於成員)
- 集團公司表格 (附件A)
- 資產轉戶表格 (附件C)
- 投資委託書

[AIA - INTERNAL]



To 致: **AIA International Limited 友邦保險(國際)有限公司**
(Incorporated in Bermuda with limited liability 於百慕達註冊成立之有限公司)
8/F, AIA Financial Centre, 712 Prince Edward Road East, Kowloon, Hong Kong
香港九龍太子道東 712 號友邦九龍金融中心 8 樓
Employer Hotline 僱主熱線: 2100 1888
Member Hotline 成員熱線: 2200 6288
Fax No. 傳真號碼: 2565 0001

MPF

AIA MPF – PRIME VALUE CHOICE -
MPF CUSTOMER DECLARATION AND CONSENT FORM (FOR EMPLOYER ONLY)
友邦強積金優選計劃 – 強積金客戶聲明及同意書
(只適用於僱主)

Please note 請注意:
*Please put a ✓ in the ☐ and *delete as appropriate. 請於適當方格內填上✓號及於 * 項目刪去不適用者。*
This declaration and consent form is applicable for conducting regulated activity(ies) under the Mandatory Provident Fund Schemes Ordinance (Cap.485). 此聲明及同意書適用於根據強制性公積金計劃條例(第 485 章)訂明之受規管活動。

PART A: EMPLOYER PARTICULARS 甲部分: 僱主資料

Employer Name 僱主名稱: _____

eMPF Employer Account No. 積金易僱主賬戶號碼: _____

Part B: MPF INTERMEDIARY INFORMATION 乙部分: 強積金中介人資料

Name of MPF Intermediary 強積金中介人名稱: _____

Agency Code 營業組別編號: _____ Agent Code 營業員編號: _____

PART C: EMPLOYER'S DECLARATION AND CONSENT 丙部分: 僱主之聲明及同意

I/We have been invited, induced or advised by one or more registered MPF intermediaries to transfer to or enrol in the AIA MPF – Prime Value Choice (the "AIA MPF Scheme"). I/We hereby provide my/our written and express consent that my/our registered MPF intermediary for receiving monetary and / or non-monetary benefits as stated in the Information About Principal Intermediary and Subsidiary Intermediary.本人/我們獲註冊強積金中介人邀請、誘使或建議轉移至或參加友邦強積金優選計劃(簡稱「友邦強積金計劃」)。本人/我們謹此就本人/我們的註冊強積金中介人收取主事及附屬中介人資料所列之金錢利益及/或非金錢利益給予書面及明示同意。

I/We acknowledge that I/we have received and read the Key Scheme Information Document, MPF Scheme Brochure (including fees and charges), Information About Principal Intermediary and Subsidiary Intermediary, Employer's and Member's Guide applicable to the AIA MPF Scheme. I/We have been advised by my/our registered MPF intermediary to refer to the MPF Scheme Brochure for details of the AIA MPF Scheme before making material decisions. 本人/我們確認已收妥及閱讀適用於友邦強積金計劃之主要計劃資料文件、強積金計劃說明書(包括費用及收費)、主事及附屬中介人資料、僱主及成員資料冊。本人/我們的註冊強積金中介人已建議本人/我們作出關鍵決定前，先參閱強積金計劃說明書以瞭解友邦強積金計劃的詳情。

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

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

I/We declare that I/we fully understand the information provided and discussed, including the rationale underlying the advice relating to transfer to or enrol in the AIA MPF Scheme. The advice given to me/us is based on the following rationale(s): (please ✓ the appropriate box(es))本人/我們聲明已完全明白所提供及討論之資料，包括有關轉移至或參加友邦強積金計劃的意見之理據。向本人/我們提供的意見乃基於以下理據：（請於適當方格內填上✓號）

☐ Schemes and fund choices 計劃及基金選擇 ☐ Fund management fees 基金管理費 ☐ Employer and member services 僱主及成員服務
☐ Other, please specify 其他，請註明: _____

any claims that the AIA MPF Scheme is preferred over the scheme I am/we
及任何就友邦強積金計劃優於本人/我們正參與的計劃之聲言。

ary that if no constituent fund is selected, all contributions (including transfer-
F Default Investment Strategy ("DIS"). My/our registered MPF intermediary
s automatic de-risking features and fee controls. 本人/我們的註冊強積金中介
取項) 便會自動按強積金預設投資策略進行投資。本人/我們的註冊強積金中介
低風險及設有收費管控。

chemes Ordinance, I/we declare that: **(please select (a) OR (b) and ✓ as**

請選擇(a) 或 (b)，並於適當方格內填上✓號)
/or my/our education level(s) is/are NOT primary or below such that I/we can
非視障或有 其他障礙及 / 或本人/我們的教育程度並非為小學或以下，本人 /

/our education level(s) is/are primary or below such that I/We cannot make a
opriate box)
程度為小學或以下，本人/吾等無法自行作出重要決定# **（請於適當方格內填**

ness during the sales process. 本人 / 我們不限意銷售過程由見證人陪同。

ng witness during the sales process: **(please ✓ the appropriate box)**
(適當方格內填上✓號)
☐ another intermediary or Employer of staff (i.e. a third party). 另一名中介人
或員工(即第三者)。

_____ _____
of witness 見證人簽署 Date 日期 (yyyy 年 / mm 月 / dd 日)

particular constituent fund; (ii) making a transfer that would involve a transfer
ccrued benefits from the MPF system; or (iv) making voluntary contributions

行涉及轉移一項保證基金的權益轉移；(iii) 提早從強積金制度中提取累算權

Collection Statement ("AIA PIC"). I/We declare and agree that any personal
oy(ies) or investments contained in this application or collected, obtained,
ee of AIA MPF Scheme (the "Trustee") by any means from time to time may
We acknowledge and consent to the transfer of my/our personal data in or
sferee as set out in the AIA PIC.
aia.com.hk and is made available upon request.
(個人資料聲明))。本人/我們聲明及同意在本申請書所載或友邦(信託)有限
收集所得、編製或持有的任何個人資料及關於本人/我們或本人/我們的保單或
/我們確認及同意就收集個人資料聲明所述目的在香港境內轉移本人/我們的個
)所載的資料承讓人。
)受託人索取。

ee under my/our name and signature. I/We agree to indemnify and keep the
s, costs, expenses, actions, proceedings and liabilities suffered by the Trustee
ovided by me/ us or my/our agent or intermediary, and/or upon the Trustee's
ere there is proven (to the satisfaction of the Trustee or its relevant affiliate)
tee or its relevant affiliate.
指示的案。除因受託人或其相關關聯公司被證明故意失實、嚴重疏忽或欺詐外
本人/我們之代理人或中介人所提供之資料錯誤及/ 或受託人或其關聯公司因
失、支出、責任，或需要進行任何行動或訴訟，本人 / 我們同意作出有關賠

By signing this declaration and consent form, my/ our declaration and consent above supersedes all of my/ our previous declaration and consent with effect from the date stated below.
本聲明及同意書一經簽署，本人 / 我們於下列所示之日期前所提供之任何聲明及同意將被本聲明及同意取替。

S.V.

_____ _____
Authorized signature and company chop Date: dd/mm/yyyy
授權人簽署及公司印鑑 日期: 日/月/年

C44_v1 (9/2025)

[AIA – INTERNAL]

- **如用紙本遞交僱主申請表格，需額外填寫客戶聲明及同意書，並交至AIA**
- **如用MPF iPoS交僱主申請表格，則毋須額外填寫客戶聲明及同意書**

友邦強積金客戶聲明及同意書遞交詳情

下載路徑: eAC > 強積金 > 下載 > 表格

遞交方法:
請遞交至 香港九龍太子道東 712 號友邦九龍金融中心 8 樓
或電郵至 mpfconsent@aia.com

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強積金客戶聲明及同意書



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HEALTHIER, LONGER, BETTER LIVES

成員登記表格

AIA confidential and proprietary information. Not for distribution.

成員基本資料

eMPF 積金易 | AIA

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。
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，應該諮詢其律師、會計師或財務顧問。
4. Please complete this form in BLOCK LETTERS with black or blue pen and tick the appropriate box(es). 請用黑色或藍色筆以正楷填寫本表格，並在適當空格內填上剔號。
5. Please countersign beside any amendment with the same signature as shown in Part 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。

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

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** _____ ("the Employer" 「僱主」)

(2) **Employer Account No. 僱主帳戶號碼**

(3) **Payroll Group ID 工資組別編號**

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** DD / MM / YYYY 日／月／年

(2) **Employee Type 僱員類別**

- ☐ (i) Newly Employed 新聘
- ☐ (ii) Scheme Transfer 計劃轉移
  (Scheme transfer from another MPF scheme or MPF Exempted ORSO Scheme * under the same employer 由同一僱主從另一個強積金計劃或獲強積金豁免的職業退休計劃 * 轉移至本計劃)
  Date of Joining the Scheme 參加計劃日期 DD / MM / YYYY 日／月／年
- ☐ (iii) Intra-group Transfer [7] 轉職至聯繫公司 [7]
  Date of Employment with Existing Employer Group [8] 受僱於現僱主集團日期 [8] DD / MM / YYYY 日／月／年
- ☐ (iv) Exempt Person [9] 獲豁免人士 [9]
  (Please refer to MPFA website for a detailed definition 詳細定義請參閱積金局網頁)
- ☐ (v) Expatriate Employee 海外僱員
  Employment Visa Issue Date 工作簽證簽發日期 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. 就成員轉移自獲強積金豁免的職業退休計劃，請填寫「成員轉移自獲強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)

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

(5) **Job Title 職銜** _____

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

(7) **Date of Joining the Original Scheme [10 & 11] 參加原計劃日期 [10 & 11]** (If applicable 如適用) 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牽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) 內所載資料經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
	DD 日 / MM 月 / YYYY 年

[AIA - INTERNAL]

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供款

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常用表格 – （僱主）

全部　登記　**供款／自願性供款**　資料更改及自我證明　轉移　終止受僱　付款相關及其他

輸入關鍵字搜尋表格　　計劃 友邦強積金優選計劃　　搜尋

[VC-VC] 友邦強積金優選計劃 - 自願性供款申請／更改表格	下載
反對附加費表格	下載
[RSCA] 強積金供款調整結算書	下載
[RS] 付款結算書	下載
[SOD] 資金來源證明表格	下載

共5個結果　　10／每頁　1　跳至

[AIA - INTERNAL]

eMPF 積金易

REMITTANCE STATEMENT
付款結算書

RS

Go Green for efficiency, you may report contribution data via Online Remittance Statement through eMPF Employer Portal
為更有效率，你可透過積金易僱主平台的網上付款結算書提交供款資料。

eMPF Web Portal 積金易網上平台

Internal use only 內部專用

eMPF Received Date:

RS

Scheme Name 計劃名稱 (Please refer to the Appendix A 請參閱附錄 A)			(the "Scheme"「計劃」)
Employer Name 僱主名稱			(the "Employer"「僱主」)
Employer Account No. 僱主帳戶號碼		Payroll Group ID 工資組別編號	
Contribution Period 供款期 (DD / MM / YYYY 日／月／年)	From 由 ☐☐/☐☐/☐☐☐☐ To 至 ☐☐/☐☐/☐☐☐☐	Bill No. 帳單編號 (If known 如知悉)	

Important Notes: 重要事項：

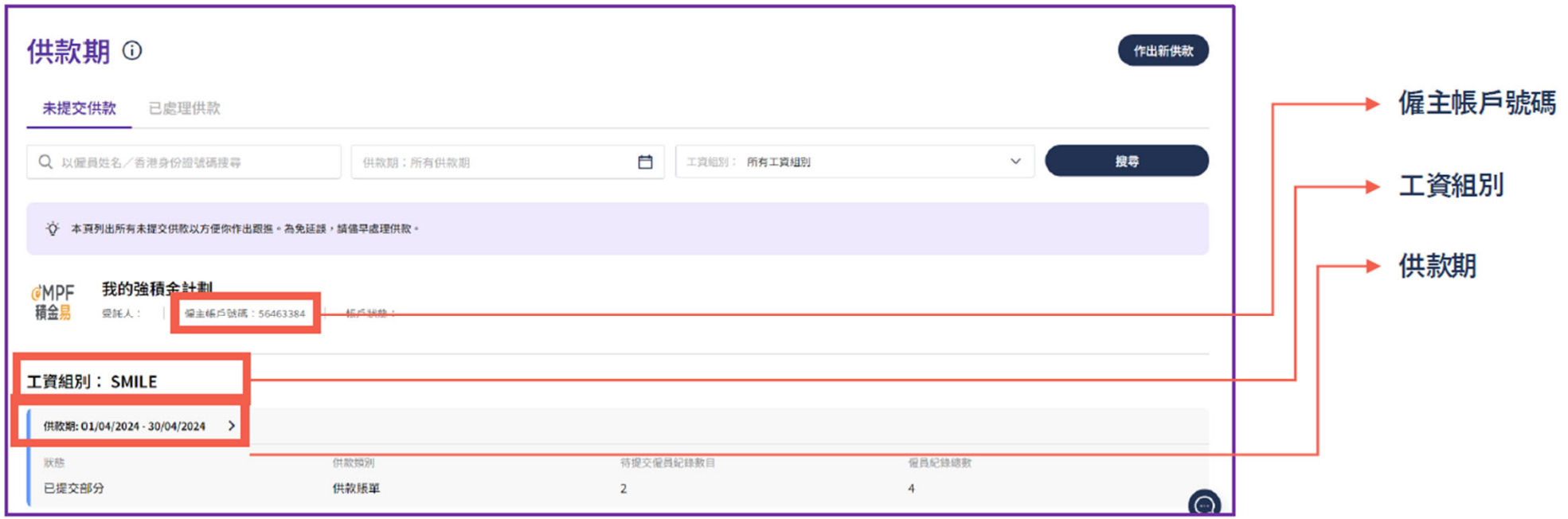
1. Please read "Guide for Remittance Statement" ("Guide") carefully before completing this Remittance Statement ("RS"). 請填寫本付款結算書前先細閱「付款結算書指南」(「指南」)。
2. By law, employers are required to make MPF contributions for all relevant employees in full and on time. If mandatory contributions are not received by MPF trustee via the eMPF Platform in full on or before the Contribution Day*, the eMPF Platform will report the default contributions to the Mandatory Provident Fund Schemes Authority ("MPFA"). Employer will be liable to 5% surcharge and may also be subject to further actions (e.g. financial penalty) to be taken by the MPFA. 按法例要求，僱主必須準時為所有有關僱員作出全額強積金供款，如強積金受託人沒有於供款日 * 或之前透過積金易平台全數收到強制性供款款項，積金易平台會將拖欠供款向強制性公積金計劃管理局 (「積金局」) 匯報。僱主會被徵收 5% 附加費，並可能會遭積金局採取其他行動 (例如罰款)。
   * "Contribution Day" means:「供款日」指：
   (i) For **regular employee**, please visit the MPFA website at https://www.mpfa.org.hk/en/mpf-system/mandatory-contributions/employees#contribution_day. 有關一**般僱員**，請瀏覽積金局網頁 https://www.mpfa.org.hk/mpf-system/mandatory-contributions/employees#contribution_day。
   (ii) For **casual employee**, please visit the MPFA website at https://www.mpfa.org.hk/en/mpf-system/types-of-mpf-schemes/industry-schemes#anchor2. 有關**臨時僱員**，請瀏覽積金局網頁 https://www.mpfa.org.hk/mpf-system/types-of-mpf-schemes/industry-schemes#anchor2。
   (iii) If the contribution day falls on a Saturday, a public holiday, a gale / black rainstorm warning day or a day on which the eMPF Platform is suspended (and the suspension affects the performance of the relevant duty of an employer), the contribution day is extended to the next day which is not a Saturday, a public holiday, a gale / black rainstorm warning day or a day on which the eMPF Platform is suspended (and the suspension affects the performance of the relevant duty of an employer). 如供款日是星期六、公眾假日、烈風／黑色暴雨警告日或積金易平台暫停運作的日子 (而暫停對僱主執行的責任有影響)，供款日將順延至該日之後的第一個並非星期六、公眾假日、烈風／黑色暴雨警告日或積金易平台暫停運作的日子 (而暫停對僱主執行的責任有影響)。
3. The information provided in this statement will be used in accordance with the relevant MPF legislation and for the purposes mentioned in the "Personal Information Collection Statement" ("PICS") of the eMPF Platform and the Scheme referred / listed above. For details, please refer to the Appendix A: List of "Personal Information Collection Statement" ("PICS") of the eMPF Platform and the MPF Schemes. 本結算書所有已提供的資料將按照有關強積金法例、積金易平台及上述所指／所列計劃《收集個人資料聲明》(「聲明」) 處理。詳情請參閱附錄 A：積金易平台及強積金計劃《收集個人資料聲明》(「聲明」) 列表。

[AIA - INTERNAL]

如何查詢公司的「僱主帳戶號碼」及「工資組別」？

如何查詢公司的「僱主帳戶號碼」？

- 登入後，於功能表點擊「**管理供款**」，選擇「**查閱供款期**」，然後選擇計劃。
- 你可在「未結算供款」分頁下查看未完成處理的供款帳單和參與計劃的「**僱主帳戶號碼**」



[AIA - INTERNAL]

付款方式

僱主 | 成員

受託人: 友邦(信託)有限公司

計劃: 友邦強積金優選計劃

付款方式: 全部

- 網上帳單繳費服務
- 支票
- 直接入帳／本地同業撥帳／銀行轉帳／電匯
- 直接扣帳
- 繳費靈

[付款方式 | 積金易網頁]

[AIA - INTERNAL]

供款繳交 – 網上銀行轉帳

付款方式 | 積金易網頁

1. 銀行付款確認通知頁面的備註欄位輸入以下其中一項:
• 積金易「提交參考編號」 (即 RSD+16 位數字)
或
• 「強積金供款賬單號碼」 (即 BLD+16 位數字)

2. 付款證明:
• 確認並提交付款指示
• 截圖或拍照保存直接入帳確認通知

3. 於積金易平台提交步驟
• 進入「繼續進行付款指示」頁面
• 選擇「直接入賬」作為付款方法
• 上載成功直接入帳確認通知的螢幕截圖或相片作為付款證明
• 點擊提交並完成付款

銀行戶口資料
銀行名稱: 香港上海滙豐銀行有限公司
銀行代號: *004*
分行代號: *500*
戶口號碼: *673223003*
收款人資料
收款人名稱: *友邦 (信託) 有限公司 – 優選*
AIA Co (Trustee) Ltd – Prime
重要事項

[AIA - INTERNAL]

積金易服務中心-預約





[聯絡我們 | 積金易網頁]

[AIA - INTERNAL]

5月4日推出「強積金僱主申請」之預先檢核及拒絕原因轉達服務



僱主申請表預先檢核服務 （選用服務）

1. 程序與文件要求

- 營業同事需將僱主申請表及相關文件電郵至：mpferapplication@aia.com。郵件主旨務必註明「公司名稱」及「商業登記證（BR）編號」。
- 接受預檢之文件： 僅限於僱主申請表及相關文件，包括但不限於BR 副本、公司註冊證明書（CI）副本、授權人身分證副本、董事名單、公司章程（M&A）、週年申報表及股權架構圖。
- 不接受預檢之文件： 為確保行政效率，請勿發送與僱主申請無關的文件（如個人賬戶成員申請表格、計劃轉移表格、直接付款授權、供款結算書或成員登記表格）。
- 企業業務會透過電郵方式回覆是否需要提交額外文件或修正相關資料。
- 如需企業業務提供支援，請致電 AIA 企業業務熱線 (852) 2100 1828。

2. 回覆時間

- 新個案： 5個工作天內（由收到郵件後之次一個工作日起計算）回覆預檢結果。
- 重新提交個案： 3個工作天內（由收到郵件後之次一個工作日起計算）回覆預檢結果。

3. 重要事項

- 本服務僅屬「預先檢核」。企業業務完成預檢後，不會將僱主申請表及相關文件轉交至 eMPF。營業同事或僱主必須自行直接向 eMPF 提交正式申請。
- 僱主申請表之收件日期將以 eMPF實際接收日期為準。
- 最終審核結果或處理時間將以eMPF 的決定為準。即使通過公司預檢，eMPF 仍可能不接納申請，或要求提交額外文件及修正相關資料。
- 請為每個僱主申請獨立提交電郵，切勿將多個申請合併發送。
- mpferapplication@aia.com僅供提交僱主申請表及相關文件進行預檢之用，請勿傳送與僱主申請無關的文件或進行一般查詢。

詳情請參閱通告A260469

5月4日推出「強積金僱主申請」之預先檢核及拒絕原因轉達服務



僱主申請之eMPF 拒絕原因轉達服務

1. 流程

- 此服務僅適用於已提交強積金客戶聲明及同意書或曾提交預檢之個案。
- 當僱主申請正式提交至 eMPF 後，營業同事應立即同時向企業業務提交強積金客戶聲明及同意書及電郵至mpfconsent@aia.com。
- 強積金客戶聲明及同意書內必須清晰註明商業登記證（BR）號碼及營業員編號，以便企業業務系統識別個案。
- 企業業務在收到 eMPF所提供的未能處理原因後，將以電郵（mpferapplication@aia.com）轉發予相關營業同事。
- 如需企業業務提供支援，請致電 AIA 企業業務熱線（852）2100 1828。

2. 重要事項

- 所有文件審核結果或處理時間均以 eMPF 作出的決定為準。
- 營業同事亦可直接向 eMPF 查詢詳情，並將補交文件或修正資料直接提交至 eMPF 平台。
- 此電郵僅供轉達eMPF所提供的未能處理原因，請勿提交其他文件或進行一般查詢。

詳情請參閱通告A260469