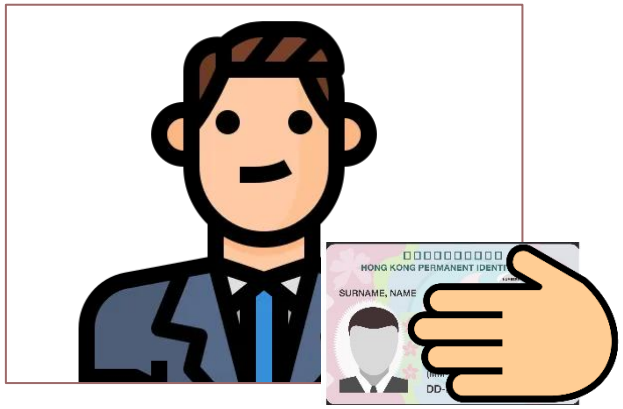
本次進修課堂開始前的注意事項

為確保獲發強積金持續專業進修核心 (CPD) 學分，參與者需要滿足以下要求：

1. 更改用戶名稱為**強積金中介人編號** 及 **英文全名** (例如: 100001 Chan Tai Man)
2. 確保視訊開啟，並於培訓時保持展示參與者的樣貌
3. **聊天室簽到**: 向會議群組聊天/會議群聊發送以下訊息: "100001 Chan Tai Man"
4. **於課堂開始前**，課堂助手會宣佈核對身份，請透過鏡頭展示**帶有相片的證件**以核對身份 (如職員證，身份證等)(如圖示)
   i. 必須要顯示參與者的**姓名**和**照片**
   ii. 請將**個人資料**(例如身份證號碼和出生日期) **覆蓋遮掩**
   iii. 待記錄完成後，課堂助手會通知各位收起身份證明文件



5. 遲到、早退累計超過 **15 分鐘**，出席記錄將不被確認
6. 參加者必須在宣佈課程正式完結時**才可在ZOOM聊天室簽退，方能獲取學分，簽到/簽退紀錄以ZOOM聊天室為準。**

持續專業進修核心活動
單元二
積金易助理介面及
強積金中介人操守



Version 0.83

Updated: 6 Feb 2026

本次進修注意事項

1. 積金易平台可能會不時微調以優化其功能，本課程所講解的資料(例如平台流程及截圖)或**非最終版本**，實際操作介面可能有所不同
2. 有關受託人過渡至積金易的安排，可能因與受託人的進一步商議而有所更新
3. **本課程的內容只供中介人內部參考使用，請勿發放予任何第三方人士、客戶及準客戶**

課程內容

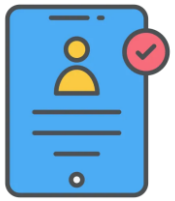
1. 單元一重溫 – 積金易平台簡介
2. 積金易助理介面 – 成員客戶
3. 積金易助理介面 – 僱主客戶
4. 相關的中介人操守要求
5. 工具及支援服務

單元一重溫
積金易平台簡介

積金易平台是什麼?

- 積金易公司是積金局的**全資附屬公司**，以非牟利的方式營運積金易平台這項**公用設施**
- **一站式**處理強積金計劃行政工作的**電子**平台
- 讓僱主及計劃成員可以**輕鬆方便**管理強積金

成員平台功能演示



帳戶註冊及登記

- **註冊積金易**
- **僱員登記參加計劃**
- **登記其他類別帳戶**



通知及待辦事項

- 通知
- 待辦事項



管理供款

- 計算及提交供款
- 補交拖欠供款



管理強積金帳戶

- 投資
- **轉移強積金**
- 提取強積金權益

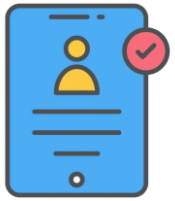


我的帳戶

- 帳戶管理
- 抵銷長期服務金／遣散費
- 信件及報表

單元一已講解的內容

僱主平台功能演示



帳戶註冊及登記

- **註冊積金易**
- **登記計劃**
- 設定使用權限



供款處理

- **計算及提交供款**
- 補交拖欠供款



管理強積金帳戶

- 計劃轉移
- **加入新僱員**
- 終止僱員受僱
- 抵銷長期服務金／遣散費



通知、文件及報告

- 通知及文件

單元一已講解的內容

供僱主及計劃成員使用的積金易



網上平台



流動應用程式

電子化所有行政程序

積金易涵蓋所有強積金計劃的行政程序，所有指示均可以**網上提交**

提供網上平台和流動應用程式

網上平台和流動應用程式均可提供相同的功能，方便成員

積金易平台為中介人帶來的好處



準備銷售文件 → 接洽客戶 → 輸入資料 → 提交指示給客人

↓

客人用積金易平台核對及提交指示 → 積金易審核及處理文件 → 完成計劃登記 / 強積金轉移等

對強積金中介人

- ✓ 可善用積金易平台，為客戶提供更優質更快捷的服務
- ✓ 減低文書上的人為錯誤，節省中介人跟進資料的時間
- ✓ 更多時間專注於提供專業財富管理及退休規劃增值服務





積金易助理介面

本課節內所有截圖僅供參考，實際操作介面可能有所不同

積金易助理介面



成員平台
(Member Portal)

*善用資訊科技銷售及服務客戶，將更省時方便



僱主平台
(Employer Portal)



助理介面只設有網頁版



積金易助理介面
(eMPF Assistant Portal)

積金易助理介面

注意！

不同於成員及僱主平台，**積金易助理介面**只設**網頁版**，中介人請前往積金易網站進行操作。

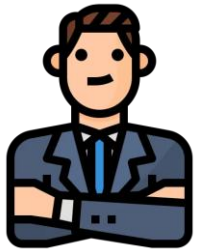


中介人



透過積金易助理介面

協助客戶填寫電子表格



僱主



自僱人士



計劃成員



積金易
網上平台及流動應用程式

登入積金易 → 核對資料 → 提交指示

積金易助理介面

- 前往積金易網站 www.empf.org.hk，然後點擊**「你的角色」**下的**「為他人處理強積**



積金易助理介面

- 點擊**前往積金易助理介面**



積金易助理介面

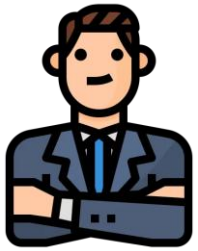
- 中介人在準備申請前，請與客戶（僱主或計劃成員）清楚溝通
- 你需要取得以下的客戶資料，以便透過助理介面填寫電子表格



計劃成員：

i. 成員積金易號碼

ii. 香港身份證號碼



僱主：

i. 僱主積金易號碼

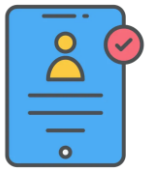
ii. 註冊證號碼（商業登記／公司註冊／其他公司證明文件號碼）

注意！

- 中介人每次透過助理介面填寫表格前，應與客戶清楚溝通，不應未事先知會客戶便擅自填寫表格。

積金易助理介面功能概覽

範例一



為成員註冊積金易

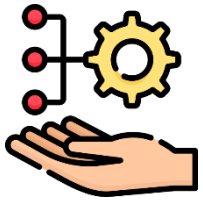
範例二



為成員登記強積金帳戶

- 可扣稅自願性供款帳戶申請表
- 自僱人士申請表格
- 特別自願性供款帳戶申請表
- 個人帳戶持有人申請表

範例三



為成員轉移強積金

- 計劃成員整合個人帳戶申請表
- 計劃成員可扣稅自願性供款轉移申請表
- 計劃成員資金轉移申請表
- 「僱員自選安排」— 轉移選擇表格

範例四



為成員申索強積金權益

- 基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益 (權益)的表格
- 基於已達到65歲退休年齡或提早退休而申索強積金累算權益(權益)的表格

範例五



為僱主登記計劃

- 僱主申請協議書

範例六



為僱主轉移資金

- 僱主資金轉移申請表

範例七



為僱主提交資料

- 僱員供款資料／加入僱員／終止僱員受僱

為計劃成員提交申請



MPF 積金易

積金易助理介面

輸入強積金中介人資料 > 選擇申請人身分及申請類別 > 輸入申請資料並提交 > 申請人啟動積金易

- 選擇**身份類別** (強積金中介人) 並輸入個人資料，包括電郵地址和手機號碼
- 然後按**下一步**



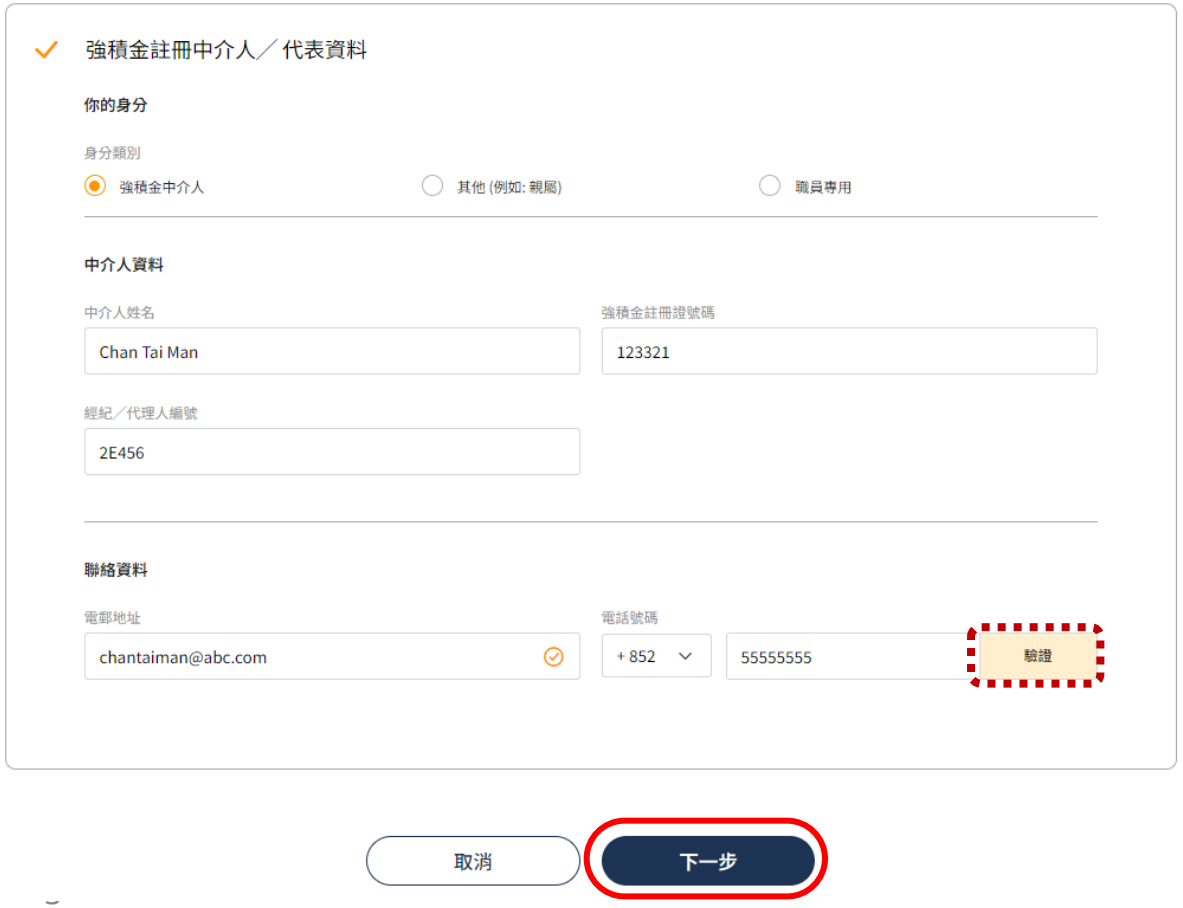
小貼士:

- 申請設有時限，並將在此頁面開始倒數
- 助理介面不會儲存已輸入的資料，中介人請於時限內完成並提交申請

積金易助理介面

輸入強積金中介人資料 > 選擇申請人身分及申請類別 > 輸入申請資料並提交 > 申請人啟動積金易

為他人預備強積金相關申請



- 點擊「**驗證**」以接收一次性密碼並驗證你的電郵地址**或**手機號碼



小貼士:

- 若中介人為電郵地址**和**手機號碼進行驗證，平台將會**同時以兩種**通訊方式向中介人發出通知。

積金易助理介面

輸入強積金中介人資料 | **選擇申請人身分及申請類別** | 輸入申請資料並提交 | 申請人啟動積金易

範例一: 為成員註冊積金易

- 選擇申請人身分（**成員**）
- 點選相應的申請類別（**註冊積金易**），然後點擊「**下一步**」



積金易助理介面

範例一: 為成員註冊積金易

輸入強積金中介人資料 → 選擇申請人身分及申請類別 → **輸入申請資料並提交** → 申請人啟動積金易

輸入計劃成員註冊積金易所需的資料:

1. **個人資料**
2. **聯絡資料**
3. **地址**
4. **通訊方式**

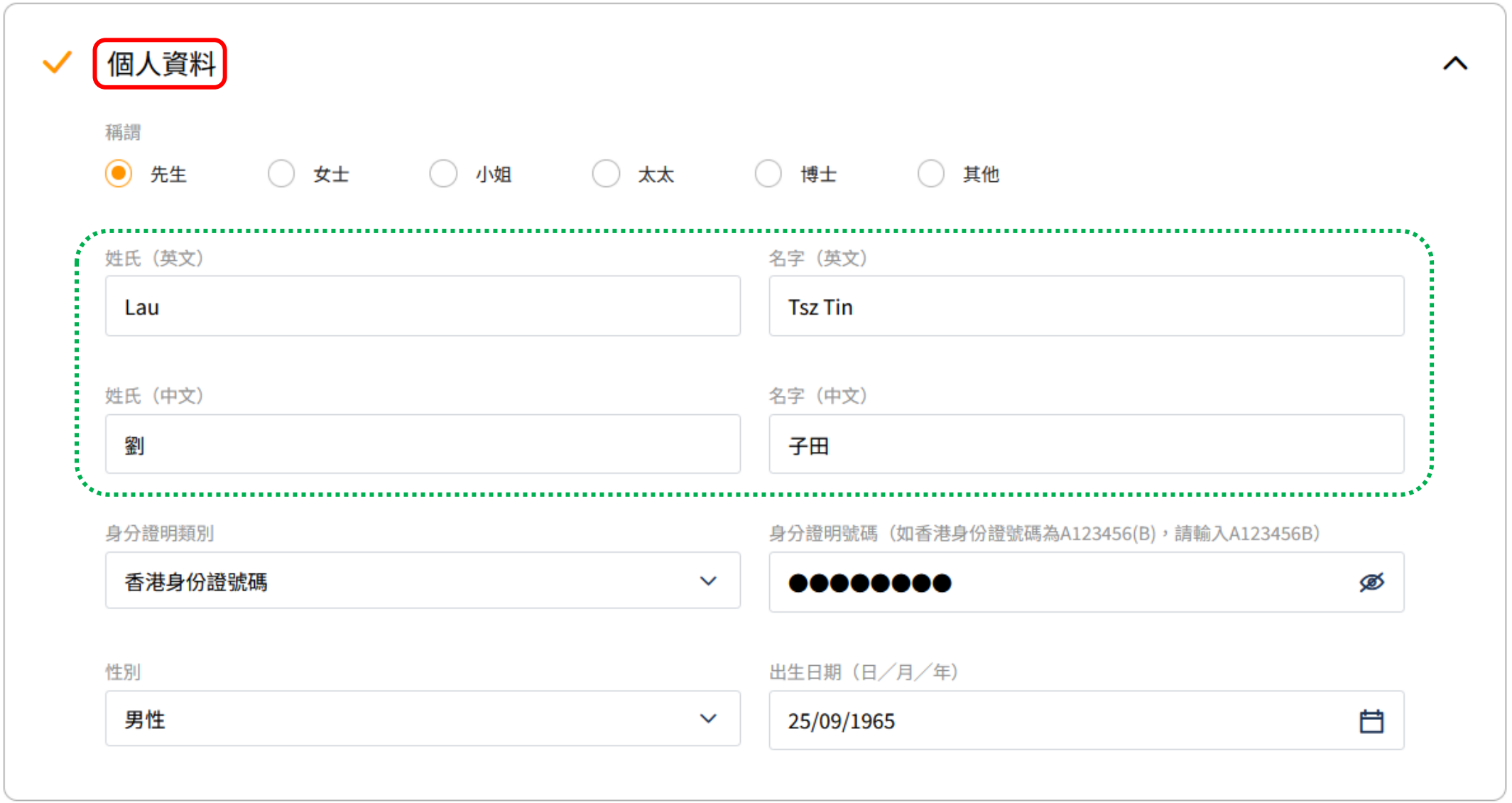


積金易助理介面

範例一: 為成員註冊積金易

小貼士：

- 可只填寫中文**或**英文姓名



積金易助理介面

範例一: 為成員註冊積金易

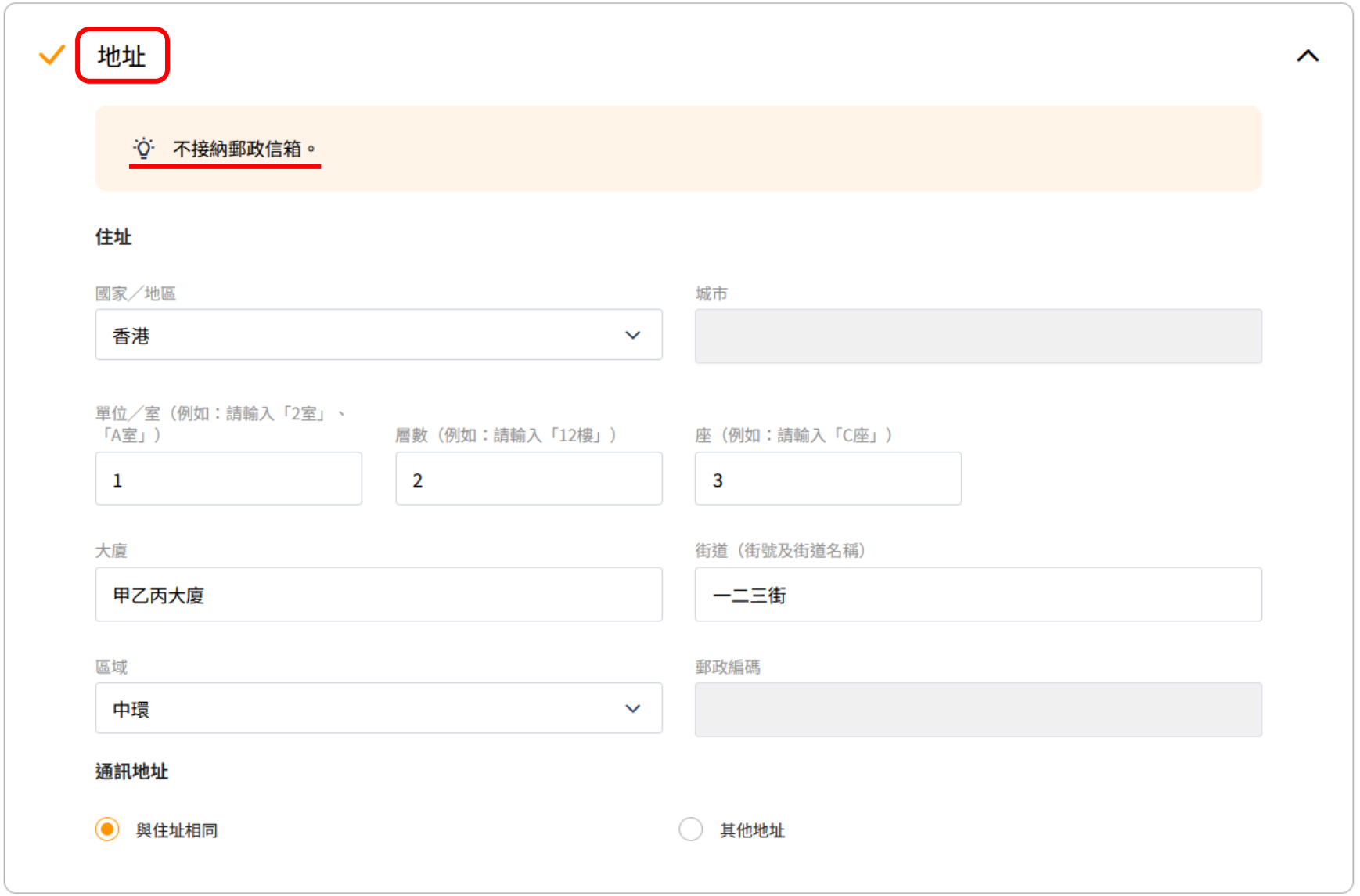


注意！

- 積金易平台會透過中介人所輸入的聯絡資料向客戶發送通知，請**確保聯絡資料準確無誤**。
- 若客戶希望透過短訊作為偏好通訊方式，請中介人緊記輸入客戶的**流動電話號碼**。

積金易助理介面

範例一: 為成員註冊積金易



積金易助理介面

範例一: 為成員註冊積金易

- 輸入所有資料後，點擊**下一步**

注意！

- 積金易平台會透過中介人在此所選擇的**偏好通訊方式**向申請人發送通知。



積金易助理介面

範例一: 為成員註冊積金易

輸入強積金中介人資料 → 選擇申請人身分及申請類別 → **輸入申請資料並提交** → 申請人啟動積金易

- 滑動並細閱條款及細則，然後點擊**同意**



積金易助理介面

範例一: 為成員註冊積金易

輸入強積金中介人資料 > 選擇申請人身分及申請類別 > **輸入申請資料並提交** > 申請人啟動積金易

成功遞交申請後，系統會顯示確認訊息。



申請已發送

參考編號：RGD0008577029721817 | 提交日期及時間：26/05/2024 03:39

你預備的申請已發送至申請人供其查閱及確認提交。

返回主頁　準備其他申請

積金易助理介面

範例一: 為成員註冊積金易

輸入強積金中介人資料 → 選擇申請人身分及申請類別 → **輸入申請資料並提交** → 申請人啟動積金易

發送申請後，平台將透過中介人所選擇的偏好/已驗證的通訊方式發送通知

積金易平台 - 參考編號：
RGD0008577029721817
你的註冊積金易指示已提交予**你的客戶**。
你的客戶需要接納該指示才能繼續處理。
請登入積金易平台查閱詳情。

查詢 (852) 183 2622

From: empfinfo <no-reply@osc.empf.org.hk>

Subject: Confirmation to MPF Intermediary - Successful Submission of Employer / Member MPF Request 確認（強積金中介人）- 僱主 / 成員的強積金指示遞交成功

注意！

為配合金管局的防詐騙措施，積金易平台**不會**透過任何即時電子訊息向客戶發送超連結。

網上提交參考編號： RGD0008577029721817

敬啓者，

你的註冊積金易指示已提交予你的客戶。你的客戶需要接納該指示才能繼續處理。請登入積金易平台查閱詳情。

如有任何查詢，歡迎致電（852）183 2622 或電郵 enquiry@support.empf.org.hk 與我們聯絡。

積金易平台 謹啓

免責聲明： 這是系統自動發出的電郵。請勿回覆

積金易助理介面

範例一: 為成員註冊積金易

輸入強積金中介人資料 > 選擇申請人身分及申請類別 > 輸入申請資料並提交 > **申請人啟動積金易**

成員可根據積金易平台發出的通知（電郵／手機短訊），下載／開啟積金易流動應用程式以完成註冊。

積金易平台 - 參考編號：
RGD0008577029721817
我們已收到您的強積金中介人 / 積金局代表 / 授權代理人 Chan Tai Man 為您提交的註冊積金易指示。請下載／開啟積金易流動應用程式以完成註冊程序。
查詢 (852) 183 2622

From: empfinfo <no-reply@osc.empf.org.hk>

Subject: Confirmation - Successful Submission of Your MPF Request 確認 - 你的強積金指示遞交成功

網上提交參考編號： RGD0008577029721817

敬啓者，

我們已收到您的強積金中介人 / 積金局代表 / 授權代理人 Chan Tai Man 為您提交的註冊積金易指示，請下載／開啟積金易流動應用程式以完成註冊程序。

如有任何查詢，歡迎致電 (852) 183 2622 或電郵 enquiry@support.empf.org.hk 與我們聯絡。

積金易平台 謹啓

積金易助理介面

範例一: 為成員註冊積金易

輸入強積金中介人資料 → 選擇申請人身分及申請類別 → 輸入申請資料並提交 → **申請人啟動積金易**

- 開啟應用程式後按「**註冊**」
- 然後下拉到頁面底部，按「**以現有紀錄繼續**」



積金易助理介面

範例一: 為成員註冊積金易

輸入強積金中介人資料 > 選擇申請人身分及申請類別 > 輸入申請資料並提交 > **申請人啟動積金易**

- 輸入中介人為成員註冊的**參考編號**及登記的**電郵地址**或**手機號碼**，按**「發送一次性密碼」**
- 輸入驗證碼



積金易助理介面

範例一: 為成員註冊積金易

i. 選擇身分驗證方式
ii. 完成身分驗證後，檢查中介人所輸入的資料。成員可按**編輯**來修改資料
iii. 確認資料無誤後，按**「提交」**





積金易助理介面

範例一: 為成員註冊積金易

i. 建立**用戶名稱**及**密碼**

ii. 成員申請人完成啟動積金易，可立即登入使用積金易平台







積金易助理介面

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > 輸入申請人資料並提交 > 申請人核對及確認

範例二: 為成員登記強積金帳戶

- 選擇申請人身分（**成員**）
- 點選相應的申請類別（**登記強積金帳戶**），然後點擊「**下一步**」

小貼士:

- 中介人請留意申請時限。



積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 | **選擇受託人和計劃名稱** | 選擇申請表 | 輸入申請人資料並提交 | 申請人核對及確認

請選擇**受託人**和**計劃**，然後點擊**「下一步」**



積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 | 選擇受託人和計劃名稱 | **選擇申請表** | 輸入申請人資料並提交 | 申請人核對及確認

選擇相應申請表，包括：

i. 可扣稅自願性供款帳戶申請表

ii. 自僱人士申請表格

iii. 特別自願性供款帳戶申請表

iv. 個人帳戶持有人申請表



積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > **選擇申請表** > 輸入申請人資料並提交 > 申請人核對及確認

選擇表格後，請細閱**重要資訊**，然後按**確定**



積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > **輸入申請人資料並提交** > 申請人核對及確認

請輸入申請人的

1. **積金易號碼** 及
2. **香港身份證號碼**

然後點擊**下一步**



注意：

- 中介人緊記需要確保此兩項資料輸入正確，否則可能導致申請人無法接收相關申請。

積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 | 選擇受託人和計劃名稱 | 選擇申請表 | **輸入申請人資料並提交** | 申請人核對及確認

中介人需於電子表格中輸入資料



小貼士：

- 中介人只須輸入淺黃色顯示的資料，可點擊**驗證**以查驗漏報卻又必需的資料
- 中介人亦可點擊**列印**或**匯出PDF**來儲存表格副本

每張電子表格頂部的工具列

- 列印
- 匯出PDF
- 第一頁 / 上一頁
- 下一頁 / 最後一頁
- 驗證
- 說明
- 放大 / 縮小

積金易助理介面

範例二: 為成員登記強積金帳戶

i. 可扣稅自願性供款帳戶申請表

所需資料:

A. 成員資料
B. 計劃及供款詳情
C. 資金來源
D. 付款方法
E. 稅務居民身分自我證明
F. 投資授權
G. 個人資料收集聲明
H. 授權及聲明



eMPF 積金易 | 強積金計劃 A

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

強積金計劃 A
可扣稅自願性供款帳戶成員申請表 TVCA

PARTICIPATION AGREEMENT FOR TAX DEDUCTIBLE VOLUNTARY CONTRIBUTIONS ACCOUNT MEMBER
可扣稅自願性供款帳戶成員參與協議

BETWEEN 有關雙方：

(1) **YF LIFE TRUSTEES LIMITED**, whose registered office is at 27/F, 33 Lockhart Road, Wanchai, Hong Kong (the "Trustee"); and
萬通信託有限公司，其註冊辦事處位於香港灣仔駱克道 33 號 27 樓（下稱「受託人」）；及

(2) The Member, whose name and address are given in the MASS Mandatory Provident Fund Scheme – Tax Deductible Voluntary Contributions ("TVC") Account Member Application Form ("Application Form") attached hereto.
成員，其名稱及地址填寫在萬全強制性公積金計劃 – 可扣稅自願性供款帳戶成員申請表（下稱「申請表」）內。

RECITALS 敘文：

(A) The Trustee is the Trustee of the MASS Mandatory Provident Fund Scheme (the "Master Trust Scheme"), which was established by a Trust Deed ("the Deed") dated 27 January 2000 made by the Trustee as amended from time to time.
萬全強制性公積金計劃（下稱「集成信託計劃」）依據於 2000 年 1 月 27 日由其受託人以不時修改的信託契約（下稱「有關契約」）成立，受託人為集成信託計劃的受託人。

(B) The Member wishes to join the Master Trust Scheme in order to establish a retirement benefits scheme (the "Scheme") for his or her own benefit as a TVC account member.
成員希望以可扣稅自願性供款帳戶成員參與集成信託計劃，用以成立為保障其利益之退休保障計劃（下稱「本計劃」）。

(C) The Scheme shall be governed by the Deed and this Participation Agreement.
本計劃將受有關契約及本參與協議規限。

PROVISIONS 條文：

(1) Unless otherwise stated, words and expressions used in this Participation Agreement (including the Recitals) shall have the meanings given to them in the Deed.
除非另有規定，本參與協議中使用的文字和表述（包括敘文）應具有有關契約所給予的涵義。

(2) The Member hereby establishes a Scheme with effect from the Date of Joining the Scheme specified in the Application Form, to be governed by the terms of the Deed and this Participation Agreement.
成員現成立一個計劃，於申請表的參加計劃日期起生效，並受有關契約及本參與協議的條款規限。

(3) The Member hereby covenants with the Trustee to comply with and be bound by the provisions of the Deed and this Participation Agreement and all applicable laws and regulations.
成員現向受託人契諾遵守有關契約及本參與協議及所有適用法律和法規的規定並受其約束。

(4) The Member warrants that the information from time to time to be provided by the Member in relation to Investment Mandates, Switching Instruction Forms and otherwise will be correct in all respects.
成員保證，由成員就不時提供的投資授權、轉換指令表格及其他資料在所有方面均是正確的。

(5) Subject to the provisions of the Deed and this Participation Agreement, the Member undertakes and agrees to hold the Trustee indemnified against any and all proceeding, costs, charges, liabilities and expenses occasioned by any and all actions, claims, demands or proceedings in connection with the Master Trust Scheme or the Scheme either:
在有關契約及本參與協議條款的規限下，成員承諾且同意，對於任何和所有訴訟、訟費、收費、償項和開支，只要上述各項是因發生下列事件而引起與集成信託計劃或本計劃有關的任何和所有法律行動、索償、要求或法律訴訟所導致的，一概會向受託人作出賠償：

(a) arising out of the breach by the Member of the warranty referred to in paragraph 4; or
因成員違反第 4 條所述的保證而引起的；或

(b) as a result of any failure or omission on the part of the Member to duly and punctually perform or observe any obligations pursuant to the Deed and this Participation Agreement or otherwise so far as they relate to the Member.
因成員未能妥善及準時地履行或遵守依照有關契約及本參與協議之任何責任或與成員相關之責任所造成的失誤或遺漏。

(6) The Member undertakes and agrees to pay all fees and expenses which are payable by it under the terms of the Deed and this Participation Agreement.
成員承諾且同意支付其在有關契約及本參與協議條款下應該支付的所有費用和開支。

1 of 17 MASS-TVCA-24V1

積金易助理介面

範例二: 為成員登記強積金帳戶

i. 可扣稅自願性供款帳戶申請表

A. 成員資料

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: 受託人 A ("the Trustee" 「受託人」)

(ii) Scheme Name 計劃名稱: 強積金計劃 A ("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: Wong

Given Name in English 英文名字: Tin Ming ("the Member")

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

(4) Date of Birth [1] 出生日期 [1]: 04/04/2003 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。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。

(6) Identification 身分證明

✓ HKID Card 香港身份證

Document No. 證件號碼: G5560***

積金易助理介面

i. 可扣稅自願性供款帳戶申請表

A. 成員資料

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

(9) Mobile Phone No. 手提電話號碼 +852 54323456 *
(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)」。

(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

tinming@abc.com

(12) Job Title / Occupation 職銜／職業 Shop Manager

(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 1 Floor 層數 2 Block 座 3

Building / Estate 大廈／屋苑 ABC Court

Street (Street No. and Street Name) 街道 (街號及街道名稱) 123 Road

District Area 區域 Wanchai

✓ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆

Country ◆ / Region ◆ 國家 ◆／地區 ◆ Hong Kong

Postal code ◆ 郵政編號 ◆

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

i. 可扣稅自願性供款帳戶申請表

B. 供款詳情

B. CONTRIBUTION DETAILS 供款詳情

Please choose appropriate 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

Regular Contribution Start Date [2]
定期供款開始日期 [2]
DD / MM / YYYY
日／月／年

Monthly Regular Contribution Amount [3]
每月定期供款金額 [3]
HKD 港幣 元

• The minimum monthly contribution amount is HKD100. 按月供款的最低供款金額為港幣100元。

(2) ☑ Lump Sum Contribution Amount [3] 整筆供款金額 [3]
HKD 港幣 60000 元

• The minimum lump sum contribution amount is HKD500. 整筆供款的最低供款金額為港幣500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帳生效日開始 (如首次供款以直接扣帳繳付)，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. 請於下列 D 部分填寫付款方法。

積金易助理介面

範例二: 為成員登記強積金帳戶

i. 可扣稅自願性供款帳戶申請表

C. 資金來源

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。

✓ **(1) Salary 薪金**

Monthly salary 月薪

30000

(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 proceed 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

積金易助理介面

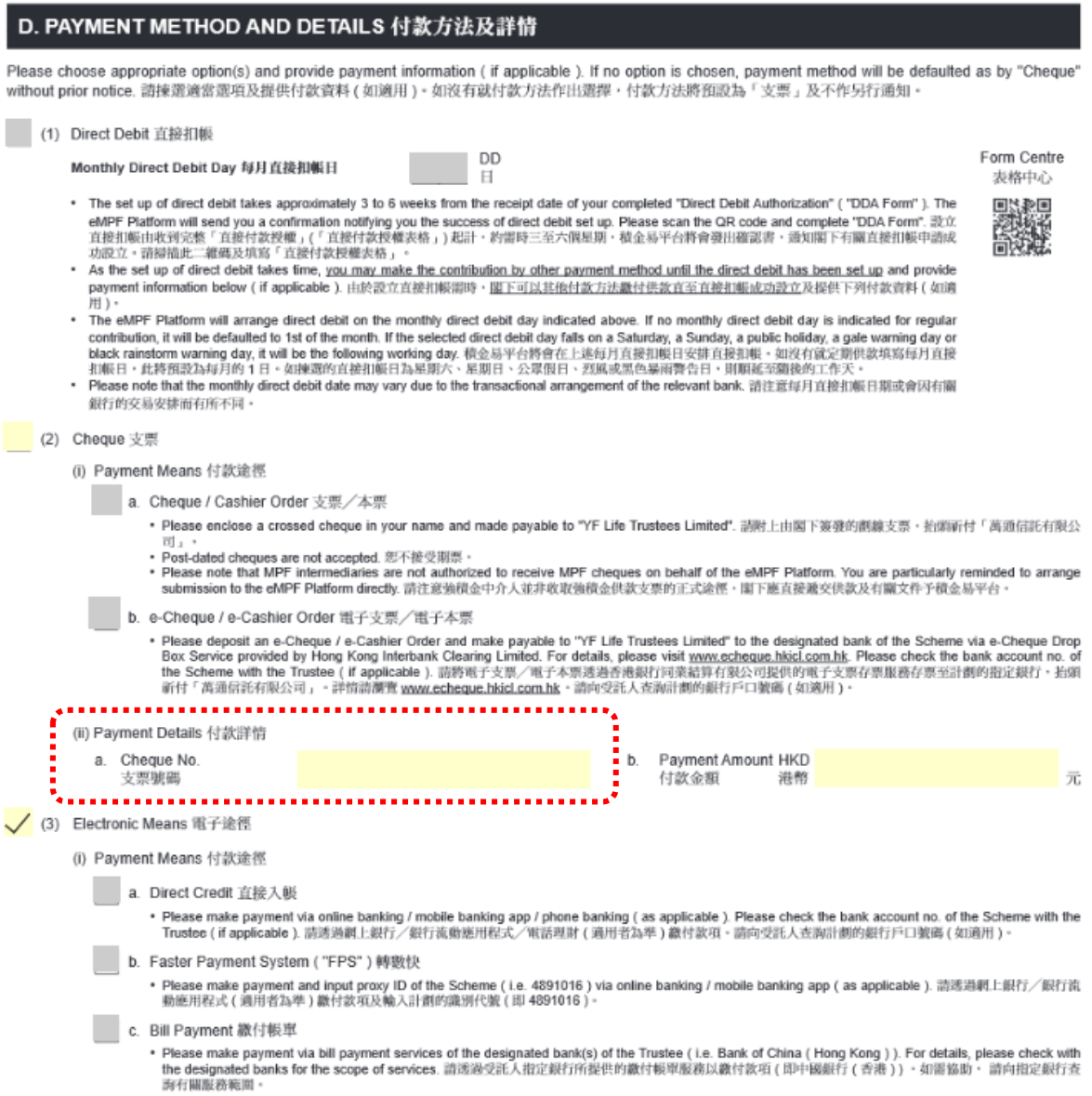
範例二: 為成員登記強積金帳戶

i. 可扣稅自願性供款帳戶申請表

D. 付款方法及詳情

注意:

- 若選擇支票作為付款途徑，申請人需提供支票號碼予中介人輸入。



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

Monthly Direct Debit Day 每月直接扣帳日 ____ DD 日

Form Centre 表格中心

- The set up 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 set up. Please scan 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，通知閣下有關直接扣帳申請成功設立。請掃描此二維碼及填寫「直接付款授權表格」。
- As the set up 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，閣下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 direct debit day indicated above. If no monthly direct debit day is indicated for regular contribution, it will be defaulted to 1st of the month. If the selected direct debit day falls on a Saturday, a Sunday, 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直接扣帳日安排直接扣帳。如沒有就定期供款填寫每月直接扣帳日，此將預設為每月的 1 日。如揀選的直接扣帳日為星期六、星期日、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 direct debit date may vary due to the transactional arrangement of the relevant bank. 請注意每月直接扣帳日期或會因有關銀行的交易安排而有所不同。

(2) Cheque 支票

(i) Payment Means 付款途徑

a. Cheque / Cashier Order 支票／本票

- Please enclose a crossed cheque in your name and made payable to "YF Life Trustees Limited". 請附上由閣下簽發的劃線支票，抬頭註付「萬通信託有限公司」。
- 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。閣下應直接遞交供款及有關文件予積金易平台。

b. e-Cheque / e-Cashier Order 電子支票／電子本票

- Please deposit an e-Cheque / e-Cashier Order and make payable to "YF Life Trustees Limited" to the designated bank of the Scheme via e-Cheque Drop Box Service provided by Hong Kong Interbank Clearing Limited. For details, please visit www.echeque.hkicl.com.hk. Please check the bank account no. of the Scheme with the Trustee (if applicable). 請將電子支票／電子本票透過香港銀行同業結算有限公司提供的電子支票存票服務存票至計劃的指定銀行，抬頭註付「萬通信託有限公司」。詳情請瀏覽 www.echeque.hkicl.com.hk。請向受託人查詢計劃的銀行戶口號碼 (如適用)。

(ii) Payment Details 付款詳情

a. Cheque No. 支票號碼 ____

b. Payment Amount HKD 付款金額 港幣 ____ 元

(3) Electronic Means 電子途徑

(i) Payment Means 付款途徑

a. 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)。

b. Faster Payment System ("FPS") 轉數快

- Please make payment and input proxy ID of the Scheme (i.e. 4891016) via online banking / mobile banking app (as applicable). 請透過網上銀行／銀行流動應用程式 (適用者為準) 繳付款項及輸入計劃的識別代號 (即 4891016)。

c. 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)). 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))。如需協助，請向指定銀行查詢有關服務範圍。

積金易助理介面

範例二: 為成員登記強積金帳戶

i. 可扣稅自願性供款帳戶申請表

E. 稅務居民身分自我證明

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). 這是閣下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)。
- 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，並提供相關資料讓閣下判定是否屬某一稅務管轄區的稅務居民。一般而言，閣下的稅務居留司法管轄區／國家會根據閣下的居住地點而定，因此，如閣下有多於一處居所 (雙重居住地)，閣下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，請諮詢閣下的稅務顧問或瀏覽 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. 如閣下的稅務居民所在地屬香港申報稅務管轄區 [5]，閣下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閣下於本自我證明申報的資料，閣下財務帳戶有關的某些財務資料轉交予香港稅務局，而相關資料或會與閣下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. In that case, 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，閣下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／受託人不獲允許向閣下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。)
- (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。)

積金易助理介面

範例二: 為成員登記強積金帳戶

i. 可扣稅自願性供款帳戶申請表

F. 投資授權

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 should give a valid investment mandate specifying the investment allocation percentage to the Default Investment Strategy ("DIS") and / or Constituent Fund(s). Please refer to point 2 below for the details of a valid investment mandate. 你須提交一個有效的投資授權，列明預設投資策略及／或成分基金的投資分配百分比。請參閱下列第二點，以查閱有效之投資授權的詳情。
2. 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 每項投資分配百分比須為整數，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%。
3. In the below events, contributions made and / or transfer-in monies from another MPF scheme(s) will be **wholly** invested in the DIS at 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**全部**根據預設投資策略進行投資。如：
   (i) you **do not** give a valid, clear or complete investment mandate including but not limited to amendments which are not properly signed; or 你**沒有**提供有效、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
   (ii) the investment allocation percentage of any selected funds is not an integer; or 任何所選基金的投資分配百分比並非整數；或
   (iii) the total investment allocation percentage of the selected funds is not 100%; or 所選基金的投資分配百分比總和不等於 100%；或
   (iv) the instruction for **all** the selected funds is unclear or illegible; or 全部所選基金指示均不清晰或無法辨認；或
   (v) no investment mandate is being provided below. 沒有於下列提供任何投資授權。
4. 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。預設投資策略選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屆 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。
5. 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			
DIS	基金 1	100			%
GLSF	基金 2				%
GLGF	基金 3				%
GUAF	基金 4				%
CAPF	基金 5				%
GLEF	基金 6				%
GLBF	基金 7				%
ASBF	基金 8				%
APEF	基金 9				%
USEF	基金 10				%
EUEF	基金 11				%
HKEF	基金 12				%
GCEF	基金 13				%
CAF2	基金 14				%
A65F2	基金 15				%
	Total 總數	**1**	**0**	**0**	%

* De-risking mechanism will not apply if you choose these constituent funds as standalone investments (rather than as part of the DIS). 如你選擇此等成分基金作為獨立投資 (而非預設投資策略的一部分)，風險降低機制並不適用。

i. 可扣稅自願性供款帳戶申請表

G. 個人資料收集聲明

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、處理及持有閣下的個人資料，用作處理閣下強積金計劃的登記和閣下強積金帳戶管理的用途。閣下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。若閣下已註冊積金易平台，即表示閣下已同意我們的收集個人資料聲明，其最新版本載於下文。若閣下尚未註冊，請參閱我們以下的收集個人資料聲明。閣下透過此表格提供個人資料，即表示閣下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、處理及持有閣下的個人資料。

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。本聲明旨在向閣下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、處理及持有閣下的個人資料、有關個人資料的用途和可能獲提供有關個人資料的對象，以及閣下可根據《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 . 閣下可於本公司的《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、保留及保護閣下個人資料的政策。

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、處理及持有與閣下有關的個人資料包括：

i. 可扣稅自願性供款帳戶申請表

H. 授權及聲明

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. 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。

i. 可扣稅自願性供款帳戶申請表

H. 授權及聲明

小貼士:

- 申請人在積金易平台的實名登入憑證能取代簽署，所以成員不需在表格上提供簽署。

Signature of Member ^ 成員簽署 ^	Date 日期
	2024/06/20 DD 日 / MM 月 / YYYY 年

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

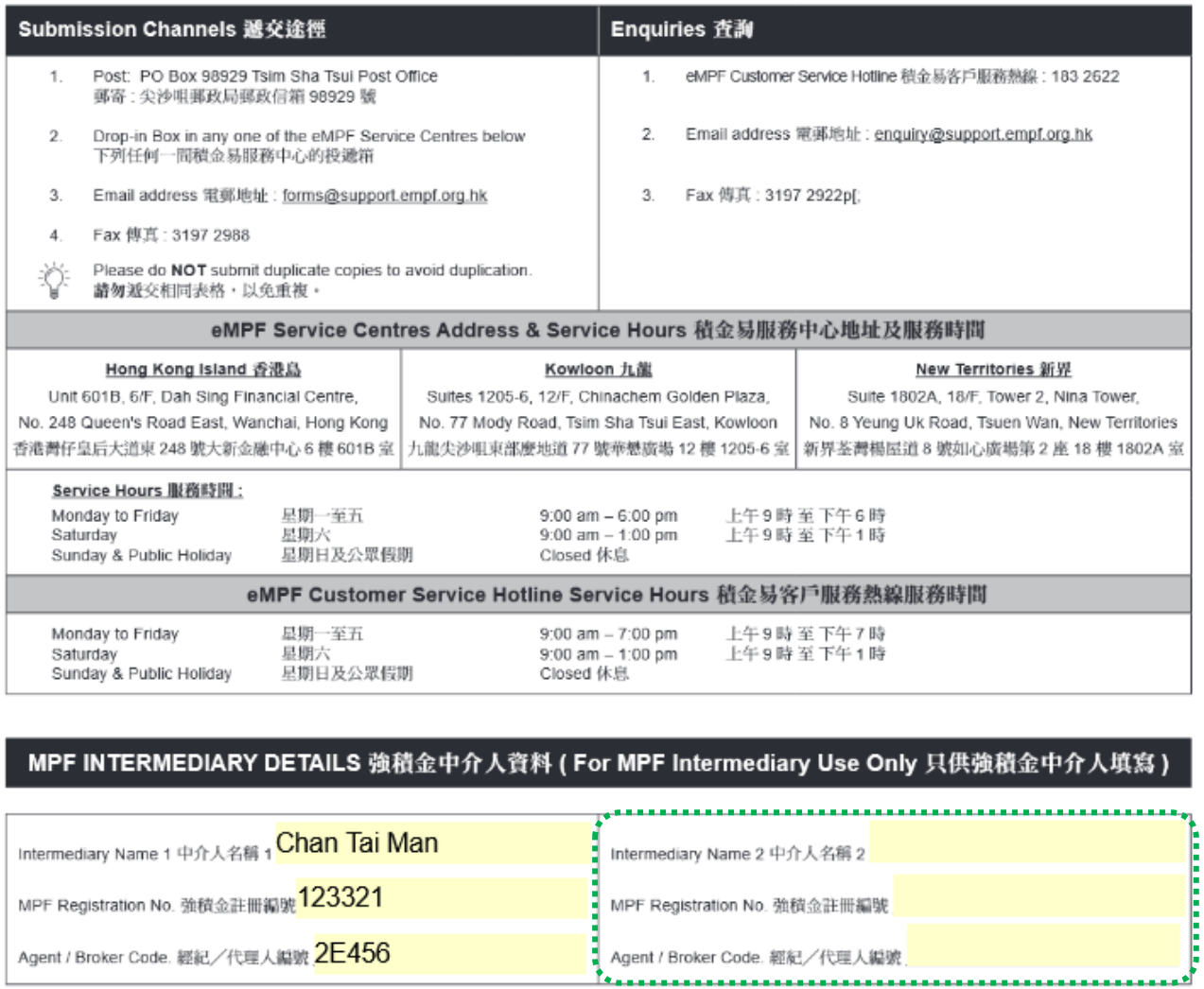
✦ **Warning 警告 :**

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) 強制性公積金計劃管理局，(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. 強制性公積金計劃管理局可能會核實可扣稅自願性供款帳戶持有人資格。

範例二: 為成員登記強積金帳戶

i. 可扣稅自願性供款帳戶申請表

中介人資料



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 2922p[;
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 九龍尖沙咀東部慶地道 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	Chan Tai Man	Intermediary Name 2 中介人名稱 2	
MPF Registration No. 強積金註冊編號	123321	MPF Registration No. 強積金註冊編號	
Agent / Broker Code. 經紀／代理人編號	2E456	Agent / Broker Code. 經紀／代理人編號	

小貼士:

- 若整個銷售過程涉及兩位中介人，可在此輸入另一位中介人的資料。

積金易助理介面

ii. 自僱人士申請表格

所需資料:

A. 成員資料
B. 營業資料
C. 計劃及供款詳情
D. 稅務居民身分自我證明
E. 投資授權
F. 個人資料收集聲明
G. 授權及聲明



eMPF 積金易 | 強積金計劃 A

強積金計劃 A
自僱人士申請表格

SEPA

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:
SEPA

PARTICIPATION AGREEMENT FOR SELF-EMPLOYED PERSON
自僱人士參與協議

BETWEEN 有關雙方：
(1) **YF LIFE TRUSTEES LIMITED**, whose registered office is at 27/F, YF Life Tower, 33 Lockhart Road, Wanchai, Hong Kong (the "Trustee"); and
萬通信託有限公司，其註冊辦事處位於香港灣仔駱克道 33 號萬通保險大廈 27 樓（下稱「受託人」）；及

(2) The Self-employed Person, whose name and address are given in the MASS Mandatory Provident Fund Scheme – Self-employed Person Application Form ("Application Form") attached hereto (the "SEP").
自僱人士（下稱「自僱人士」），其名稱及地址填寫在萬全強制性公積金計劃 – 自僱人士申請表格（下稱「申請表格」）內。

RECITALS 敘文：
(A) The Trustee is the Trustee of the MASS Mandatory Provident Fund Scheme (the "Master Trust Scheme"), which was established by a Trust Deed (the "Deed") dated 27 January 2000 made by the Trustee as amended from time to time.
萬全強制性公積金計劃（下稱「集成信託計劃」）依據於 2000 年 1 月 27 日由其受託人以不時修改的信託契約（下稱「有關契約」）成立，受託人為集成信託計劃的受託人。

(B) The SEP wishes to join the Master Trust Scheme in order to establish a retirement benefits scheme (the "Scheme") for his or her own benefit as a SEP Member.
自僱人士希望以自僱人士成員參與集成信託計劃，用以成立為保障其利益之退休保障計劃（下稱「本計劃」）。

(C) The Scheme shall be governed by the Deed and this Participation Agreement.
本計劃將受有關契約及本參與協議規限。

PROVISIONS 條文：
1. Unless otherwise stated, words and expressions used in this Participation Agreement (including the Recitals) shall have the meanings given to them in the Deed.
除非另有規定，本參與協議中使用的文字和表述（包括敘文）應具有有關契約所給予的涵義。

2. The SEP hereby establishes a Scheme with effect from the Date of Joining the Scheme specified in the Application Form, to be governed by the terms of the Deed and this Participation Agreement.
自僱人士現成立一個計劃，於申請表格的參加計劃日期起生效，並受有關契約及本參與協議的條款規限。

3. The SEP hereby covenants with the Trustee to comply with and be bound by the provisions of the Deed and this Participation Agreement and all applicable laws and regulations.
自僱人士現向受託人契諾遵守有關契約及本參與協議及所有適用法律和法規的規定並受其約束。

4. The SEP warrants that the information from time to time to be provided by the SEP in relation to contributions *and* as to the age, income, benefits, Investment Mandates, Switching Instruction Forms and otherwise will be correct in all respects.
自僱人士保證，由自僱人士就供款不時提供的資料及關於年齡、薪金、福利、投資授權、轉換指令表格及其他資料在所有方面均是正確的。

5. Subject to the provisions of the Deed and this Participation Agreement, the SEP undertakes and agrees to hold the Trustee indemnified against any and all proceeding, costs, charges, liabilities and expenses occasioned by any and all actions, claims, demands or proceedings in connection with the Master Trust Scheme or the Scheme either:
在有關契約及本參與協議條款的規限下，自僱人士承諾且同意，對於任何和所有訴訟、訟費、收費、債項和開支，只要上述各項是因發生下列事件而引起與集成信託計劃或本計劃有關的任何和所有法律行動、索償、要求或法律訴訟所導致的，一概會向受託人作出賠償：
(a) arising out of the breach by the SEP of the warranty referred to in paragraph 4; or
因自僱人士違反第 4 條所述的保證而引起的；或
(b) as a result of any failure or omission on the part of the SEP to duly and punctually perform or observe any obligations pursuant to the Deed and this Participation Agreement or otherwise so far as they relate to the SEP.
因自僱人士未能妥善及準時地履行或遵守依照有關契約及本參與協議之任何責任或與自僱成員相關之責任所造成的失誤或遺漏。

6. The SEP undertakes and agrees to pay all fees and expenses which are payable by it under the terms of the Deed and this Participation Agreement.
自僱人士承諾且同意支付其在有關契約及本參與協議條款下應該支付的所有費用和開支。

7. The SEP hereby acknowledges that:
自僱人士確認：
(a) He/she is aware that YF Life Insurance International Ltd. ("YF Life") is the promoter of the Master Trust Scheme and its registered office is at 27/F, YF Life Tower, 33 Lockhart Road, Wanchai, Hong Kong. YF Life, the immediate holding company of the Trustee, is a registered principal intermediary with the Mandatory Provident Fund Schemes Authority (MPF Registration No.: IC000218) and is carrying on life insurance business.
他 / 她已得悉萬通保險國際有限公司（下稱「萬通保險」）是集成信託計劃的推銷商，其註冊辦事處位於香港灣仔駱克道 33 號萬通保險大廈 27 樓，作為受託人的直屬控股公司，萬通保險是強制性公積金計劃管理局的註冊主事中介人（強積金中介人註冊號碼：IC000218），主要經營人壽保險業務。
(b) The registered subsidiary intermediary ("Intermediary") mentioned in the Application Form, completed for the SEP for the purpose of joining the Master Trust Scheme, is appointed by YF Life to distribute the Master Trust Scheme, and to invite and induce another person to make a material decision related to the matters set out in section 34F(5) of the Mandatory Provident Fund Schemes (Amendment) Ordinance 2012.
為參與集成信託計劃，替自僱人士填妥的申請表格當中提及的註冊強制性公積金附屬中介人（下稱「中介人」）是由萬通保險委任，負責分發集成信託計劃及邀請和誘使其他人士作出與 2012 年強制性公積金（修訂）條例第 34F(5) 條中所述的事項有關的重要決定。
(c) The Intermediary has provided his/ her business card to the SEP.
中介人已向自僱人士提供他 / 她的名片。

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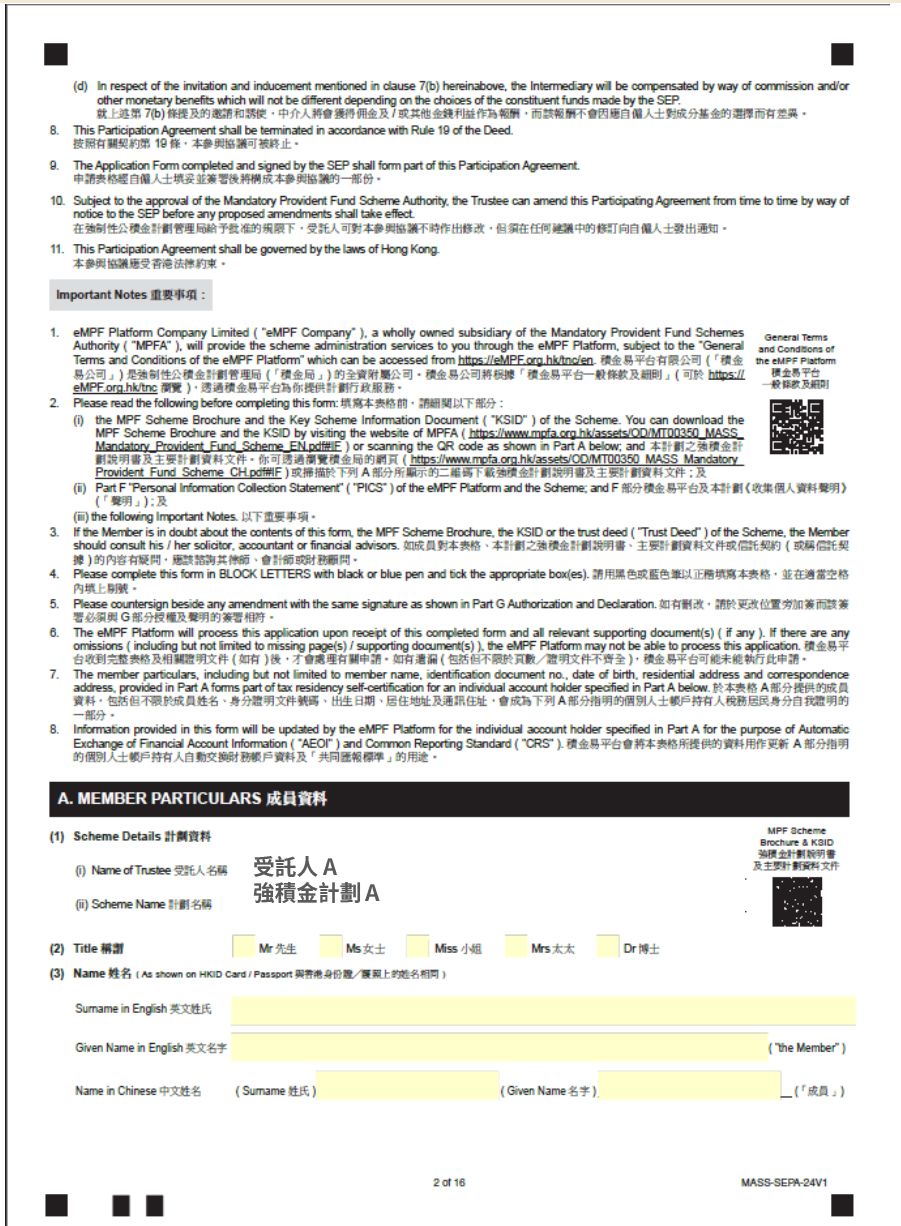
積金易助理介面

範例二: 為成員登記強積金帳戶

ii. 自僱人士申請表格

所需資料:

A. 成員資料
B. 營業資料
C. 計劃及供款詳情
D. 稅務居民身分自我證明
E. 投資授權
F. 個人資料收集聲明
G. 授權及聲明



(d) In respect of the invitation and inducement mentioned in clause 7(b) hereinabove, the Intermediary will be compensated by way of commission and/or other monetary benefits which will not be different depending on the choices of the constituent funds made by the SEP.
就上述第 7(b) 條提及的邀請和誘使，中介人將會獲得佣金及 / 或其他金錢利益作為報酬，而該報酬不會因應自僱人士對成分基金的選擇而有差異。

8. This Participation Agreement shall be terminated in accordance with Rule 19 of the Deed.
按照有關契約第 19 條，本參與協議可被終止。

9. The Application Form completed and signed by the SEP shall form part of this Participation Agreement.
申請表格經自僱人士填妥並簽署後將構成本參與協議的一部份。

10. Subject to the approval of the Mandatory Provident Fund Scheme Authority, the Trustee can amend this Participating Agreement from time to time by way of notice to the SEP before any proposed amendments shall take effect.
在強制性公積金計劃管理局給予批准的規限下，受託人可對本參與協議不時作出修改，但須在任何建議中的修訂向自僱人士發出通知。

11. This Participation Agreement shall be governed by the laws of Hong Kong.
本參與協議應受香港法律約束。

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/MT00350_MASS_Mandatory_Provident_Fund_Scheme_EN.pdf#IF) 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/MT00350_MASS_Mandatory_Provident_Fund_Scheme_CH.pdf#IF) 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。

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

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 advisors. 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 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、居住地址及通訊住址，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"). 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。

A. MEMBER PARTICULARS 成員資料

(1) Scheme Details 計劃資料

(i) Name of Trustee 受託人名稱　受託人 A

(ii) Scheme Name 計劃名稱　強積金計劃 A

(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

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

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

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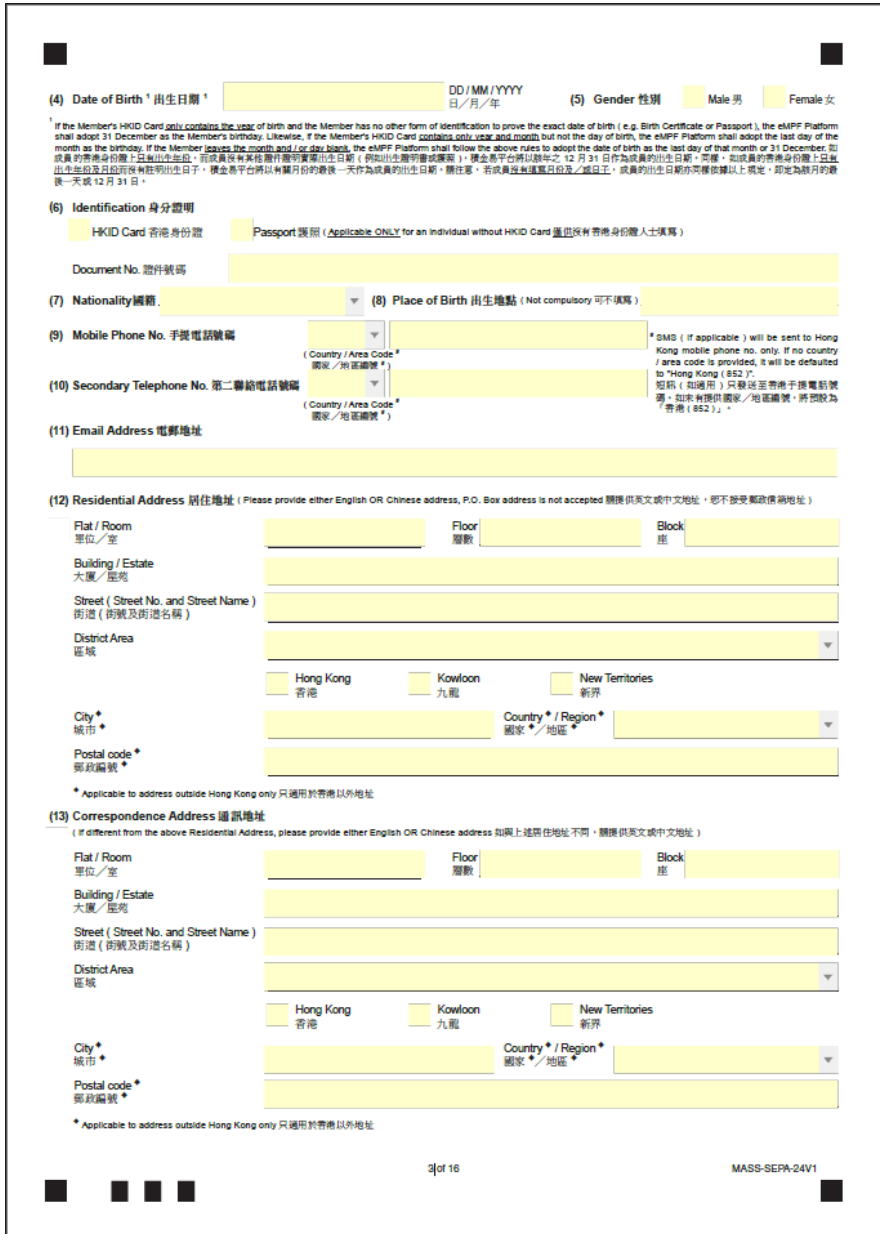
積金易助理介面

範例二: 為成員登記強積金帳戶

ii. 自僱人士申請表格

所需資料:

A. 成員資料
B. 營業資料
C. 計劃及供款詳情
D. 稅務居民身分自我證明
E. 投資授權
F. 個人資料收集聲明
G. 授權及聲明



(4) Date of Birth ¹ 出生日期 ¹ 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。請注意，若成員沒有填寫月份及／或日子，成員的出生日期亦可根據以上規定，即定為該月的最後一天或 12 月 31 日。

(6) Identification 身分證明

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

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

(9) Mobile Phone No. 手提電話號碼 (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)」。

(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

(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 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

(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 *

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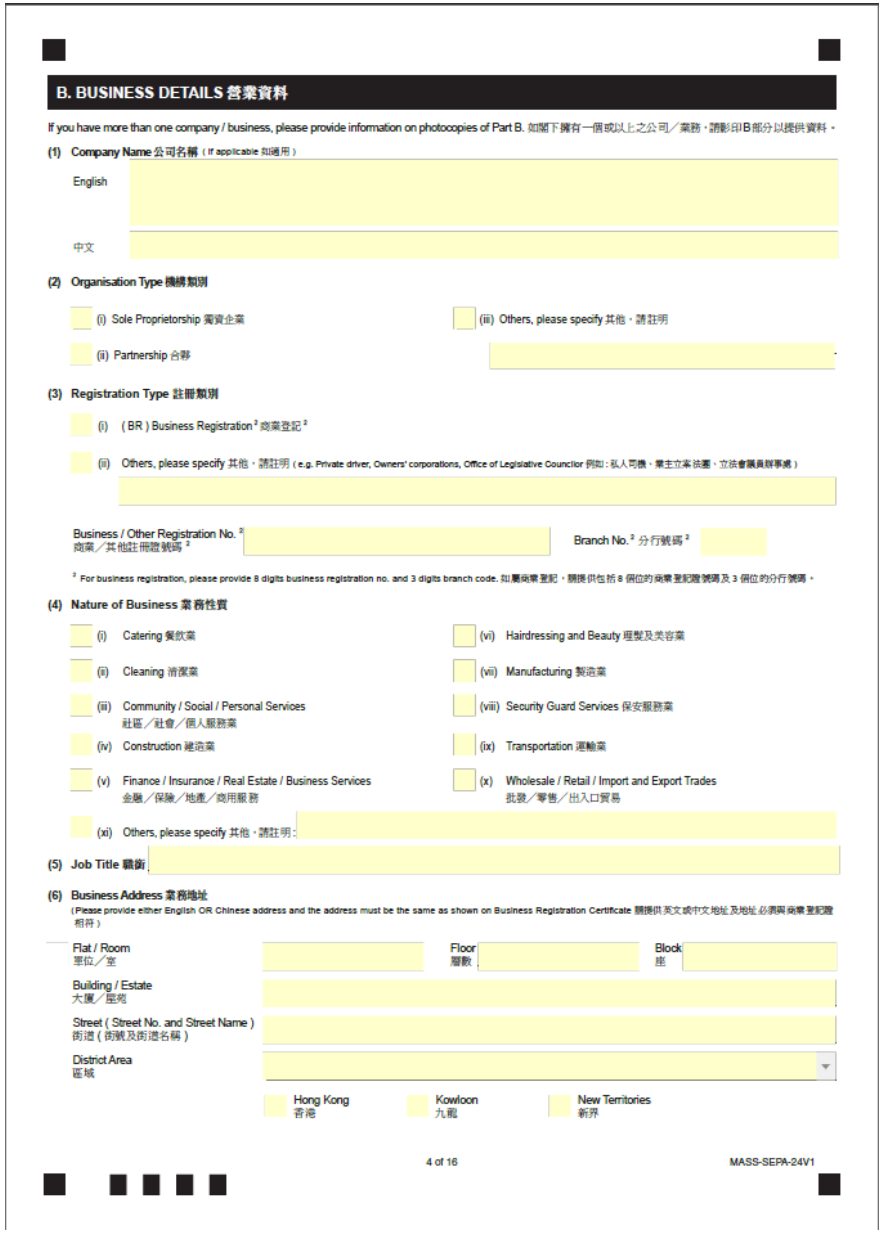
ii. 自僱人士申請表格

所需資料:

A. 成員資料
B. 營業資料
C. 計劃及供款詳情
D. 稅務居民身分自我證明
E. 投資授權
F. 個人資料收集聲明
G. 授權及聲明



B. BUSINESS DETAILS 營業資料

If you have more than one company / business, please provide information on photocopies of Part B. 如閣下擁有一個或以上之公司／業務，請影印B部分以提供資料。

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

English

中文

(2) Organisation Type 機構類別

(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

(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]
Branch No. [2] 分行號碼 [2]

[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

(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：

(5) Job Title 職銜

(6) Business Address 業務地址

(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
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

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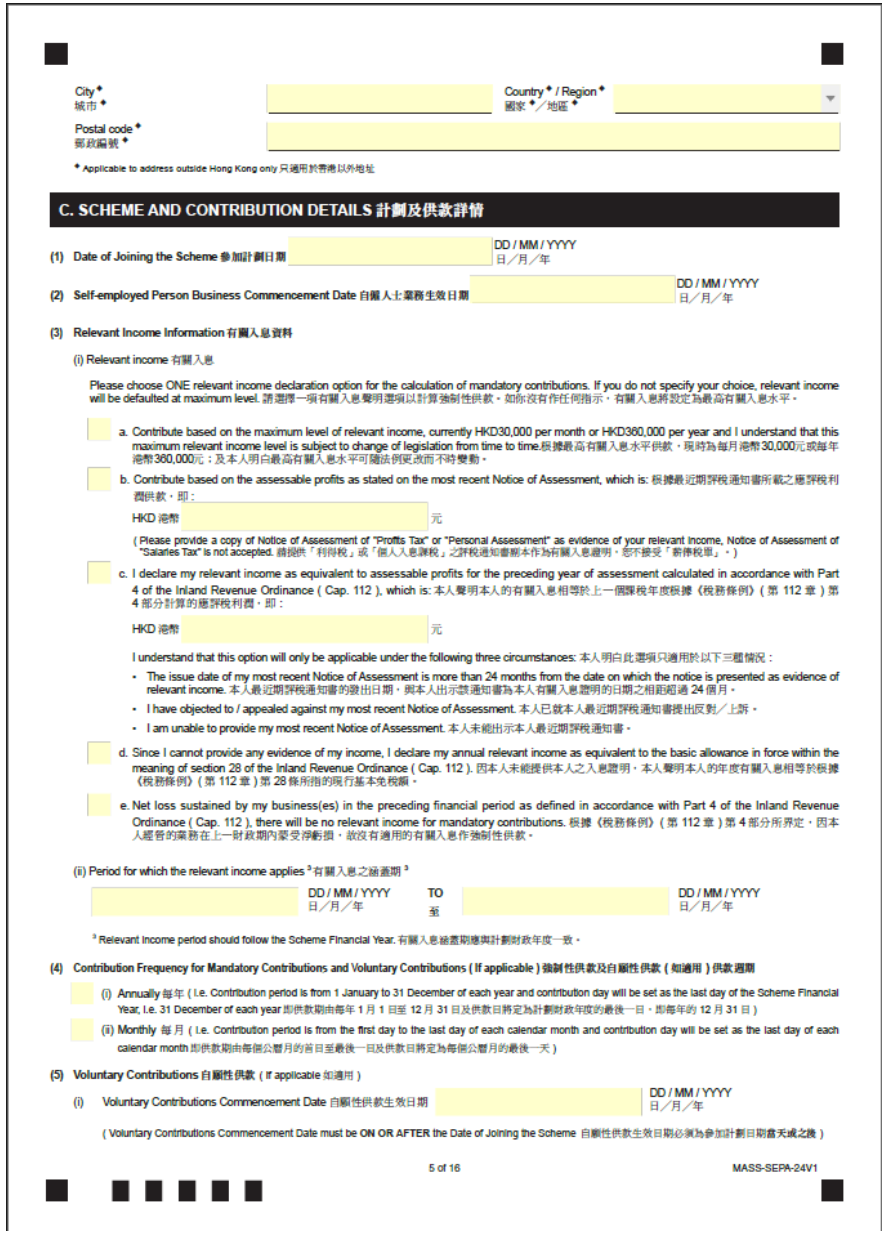
MASS-SEPA-24V1

積金易助理介面

ii. 自僱人士申請表格

所需資料:

A. 成員資料
B. 營業資料
C. 計劃及供款詳情
D. 稅務居民身分自我證明
E. 投資授權
F. 個人資料收集聲明
G. 授權及聲明



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 AND CONTRIBUTION DETAILS 計劃及供款詳情

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

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

(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. 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。

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 [3] 有關入息之涵蓋期 [3]

DD / MM / YYYY 日／月／年 TO 至 DD / MM / YYYY 日／月／年

[3] Relevant income period should follow the Scheme Financial Year. 有關入息涵蓋期應與計劃財政年度一致。

(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 January to 31 December of each year and contribution day will be set as the last day of the Scheme Financial Year, i.e. 31 December of each year 即供款期由每年 1 月 1 日至 12 月 31 日及供款日將定為計劃財政年度的最後一日，即每年的 12 月 31 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最後一日及供款日將定為每個公曆月的最後一天)

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

(i) Voluntary Contributions Commencement Date 自願性供款生效日期 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)

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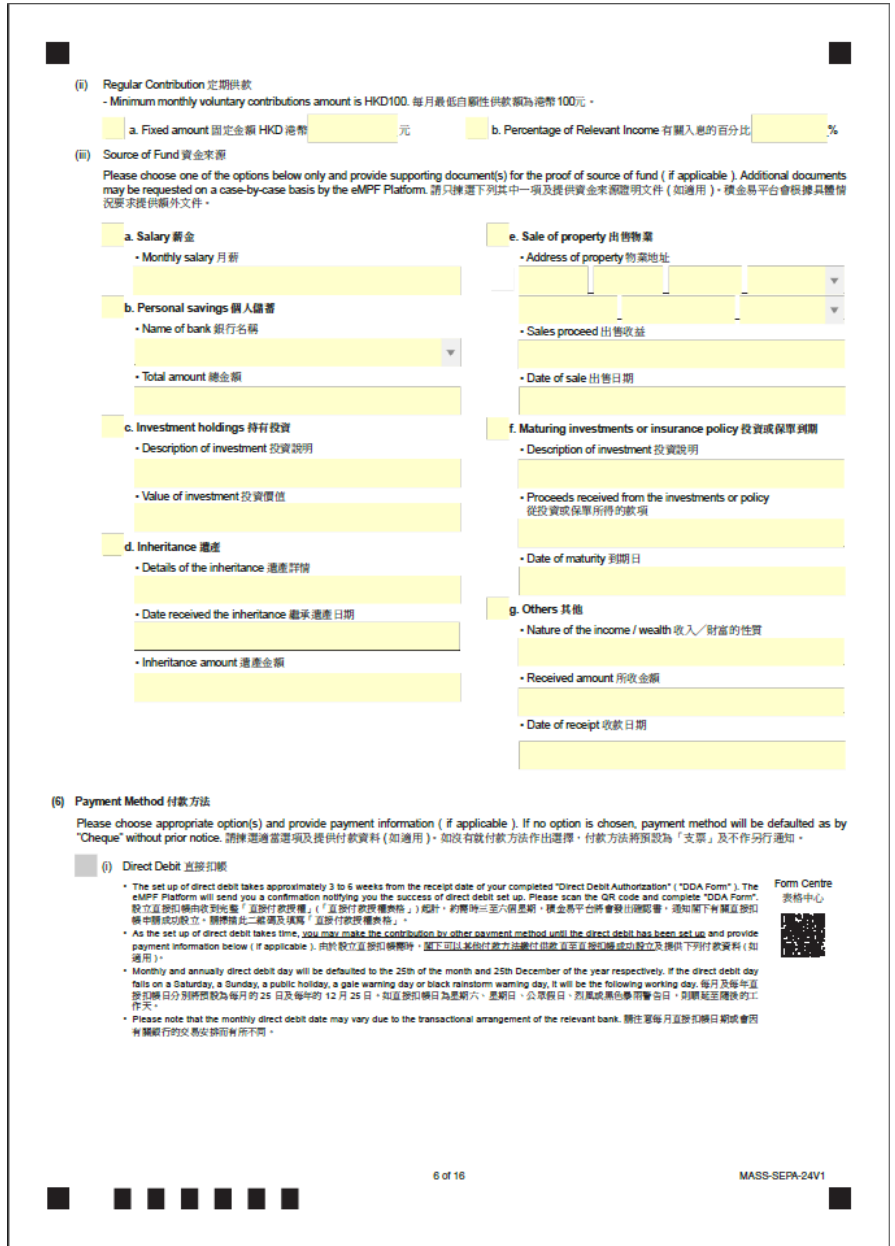
積金易助理介面

範例二: 為成員登記強積金帳戶

ii. 自僱人士申請表格

所需資料:

A. 成員資料
B. 營業資料
C. 計劃及供款詳情
D. 稅務居民身分自我證明
E. 投資授權
F. 個人資料收集聲明
G. 授權及聲明



(ii) Regular Contribution 定期供款
- Minimum monthly voluntary contributions amount is HKD100. 每月最低自願性供款額為港幣100元。

a. Fixed amount 固定金額 HKD 港幣 元　b. Percentage of Relevant Income 有關入息的百分比 %

(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)。積金易平台會視據具體情況要求提供額外文件。

a. Salary 薪金
- Monthly salary 月薪

b. Personal savings 個人儲蓄
- Name of bank 銀行名稱
- Total amount 總金額

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 proceed 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

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

- The set up 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 set up. Please scan the QR code and complete "DDA Form". 設立直接扣賬申請表格」)。約需時三至六個星期，積金易平台將會發出確認書，通知閣下有關直接扣賬申請成功設立。請掃描此二維碼及填寫「直接付款授權表格」。
- As the set up 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，閣下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 25th of the month and 25th December of the year respectively. If the direct debit day falls on a Saturday, a Sunday, 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 25 日及每年的 12 月 25 日。如直接扣賬日為星期六、星期日、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 direct debit date may vary due to the transactional arrangement of the relevant bank. 謹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

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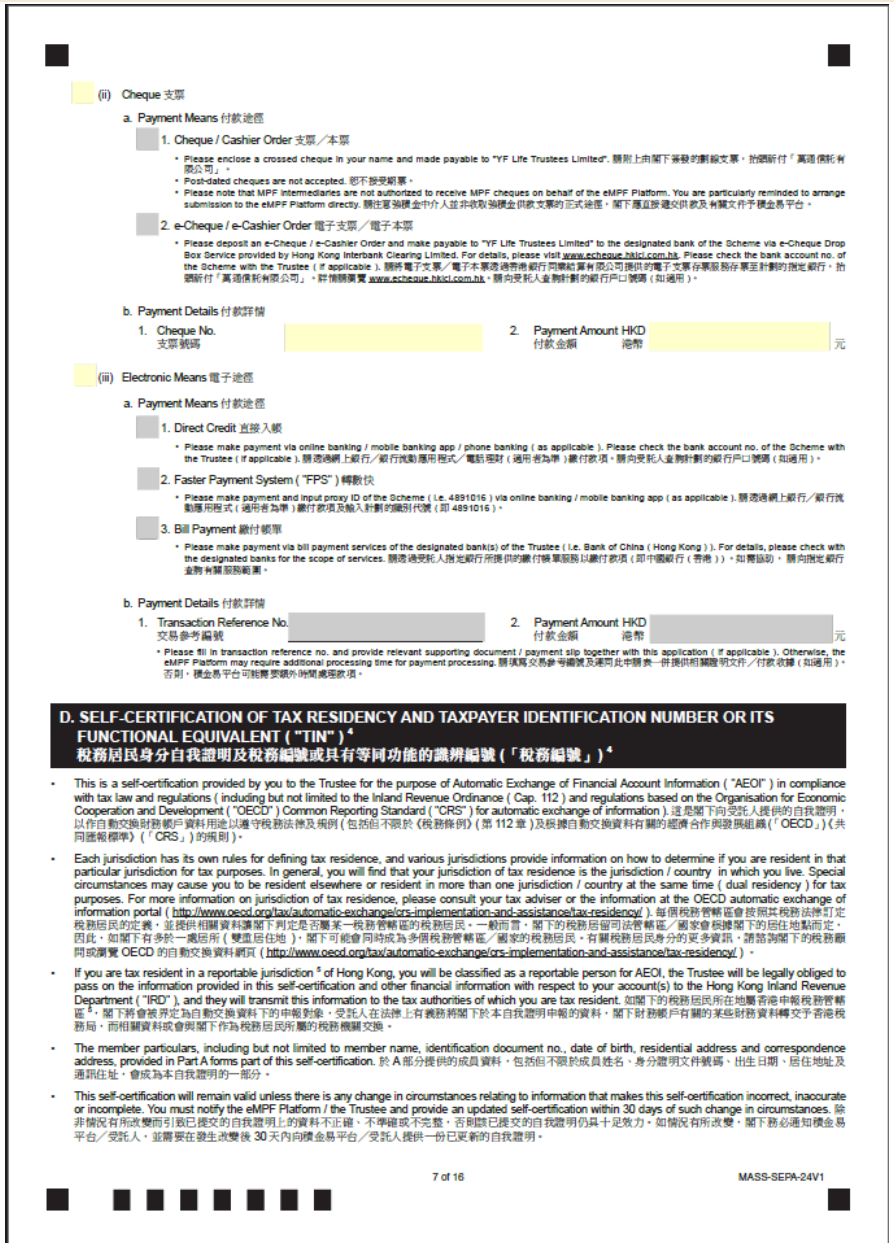
積金易助理介面

ii. 自僱人士申請表格

所需資料:

A. 成員資料
B. 營業資料
C. 計劃及供款詳情
D. 稅務居民身分自我證明
E. 投資授權
F. 個人資料收集聲明
G. 授權及聲明



(ii) Cheque 支票

a. Payment Means 付款途徑

1. Cheque / Cashier Order 支票／本票

- Please enclose a crossed cheque in your name and made payable to "YF Life Trustees Limited". 請附上由閣下簽發的劃線支票，抬頭註付「萬通信託有限公司」。
- 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，閣下應直接遞交供款及有關文件予積金易平台。

2. e-Cheque / e-Cashier Order 電子支票／電子本票

- Please deposit an e-Cheque / e-Cashier Order and make payable to "YF Life Trustees Limited" to the designated bank of the Scheme via e-Cheque Drop Box Service provided by Hong Kong Interbank Clearing Limited. For details, please visit www.echeque.hkicl.com.hk. Please check the bank account no. of the Scheme with the Trustee (if applicable). 請將電子支票／電子本票透過香港銀行同業結算有限公司提供的電子支票存票服務存票至計劃的指定銀行，抬頭註付「萬通信託有限公司」。詳情請瀏覽 www.echeque.hkicl.com.hk。請向受託人查詢計劃的銀行戶口號碼（如適用）。

b. Payment Details 付款詳情

1. Cheque No. 支票號碼 _____ 2. Payment Amount HKD 付款金額 港幣 _____ 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. Faster Payment System ("FPS") 轉數快

- Please make payment and input proxy ID of the Scheme (i.e. 4891016) via online banking / mobile banking app (as applicable). 請透過網上銀行／銀行流動應用程式（適用者為準）繳付款項及輸入計劃的識別代號（即 4891016）。

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)). 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））。如需詳情，請向指定銀行查詢有關服務範圍。

b. Payment Details 付款詳情

1. Transaction Reference No. 交易參考編號 _____ 2. Payment Amount HKD 付款金額 港幣 _____ 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") [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). 這是閣下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）。
- 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，並提供相關資料讓閣下判定是否屬某一稅務管轄區的稅務居民。一般而言，閣下的稅務居留司法管轄區／國家會根據閣下的居住地點而定，因此，如閣下有多於一處居所（雙重居住地），閣下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，請諮詢閣下的稅務顧問或瀏覽 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. 如閣下的稅務居民所在地屬香港申報稅務管轄區[5]，閣下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閣下於本自我證明中報的資料，閣下財務帳戶有關的某些財務資料轉交予香港稅務局，而相關資料或會與閣下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、居住地址及通訊住址，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，閣下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。

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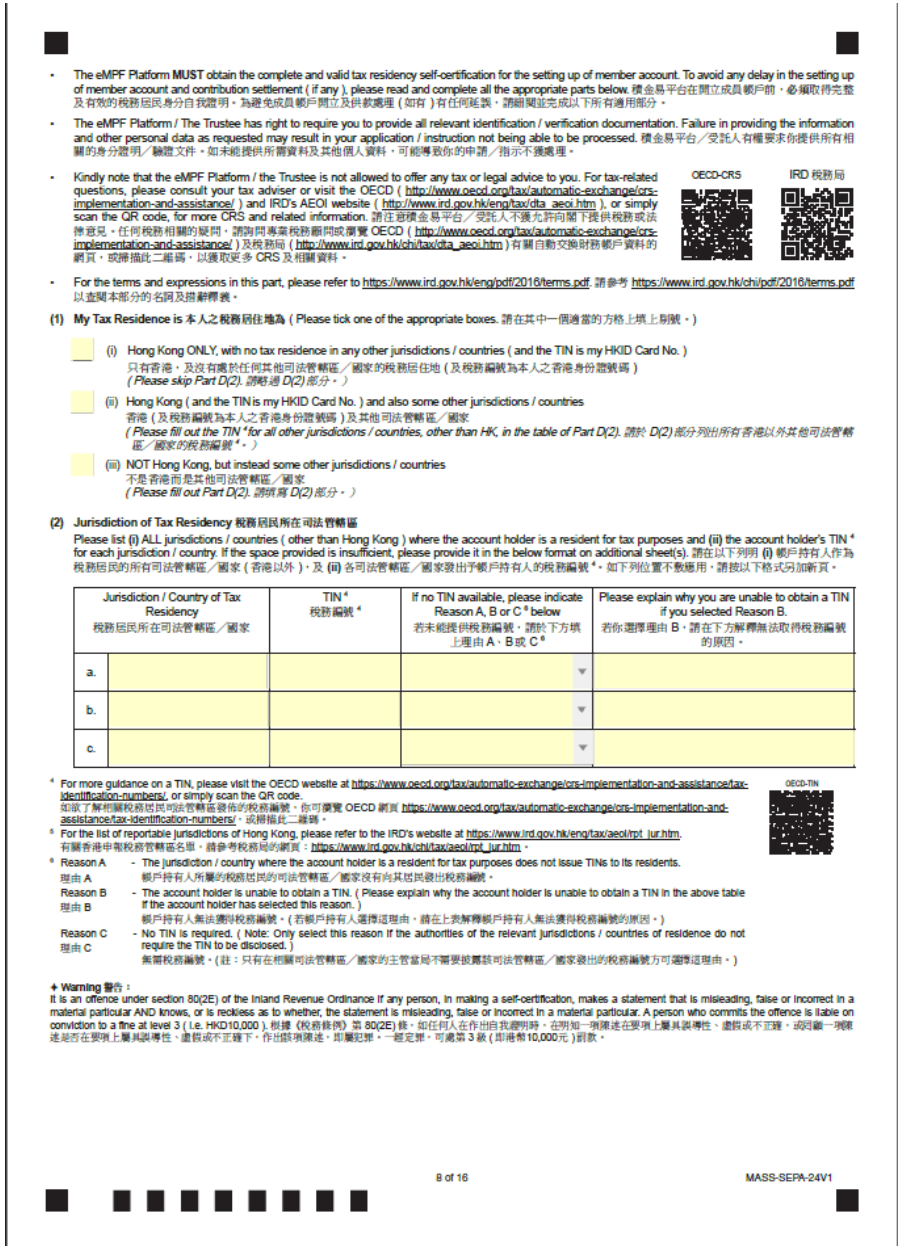
積金易助理介面

範例二: 為成員登記強積金帳戶

ii. 自僱人士申請表格

所需資料:

A. 成員資料
B. 營業資料
C. 計劃及供款詳情
D. 稅務居民身分自我證明
E. 投資授權
F. 個人資料收集聲明
G. 授權及聲明



- 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／受託人不獲允許向閣下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。

(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，及沒有屬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。)

☐ (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 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 [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 D(2). 請填寫 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 [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 [6] below 若未能提供稅務編號，請於下方填上理由 A、B 或 C [6]	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.				
b.				
c.				

[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。

[6] 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。

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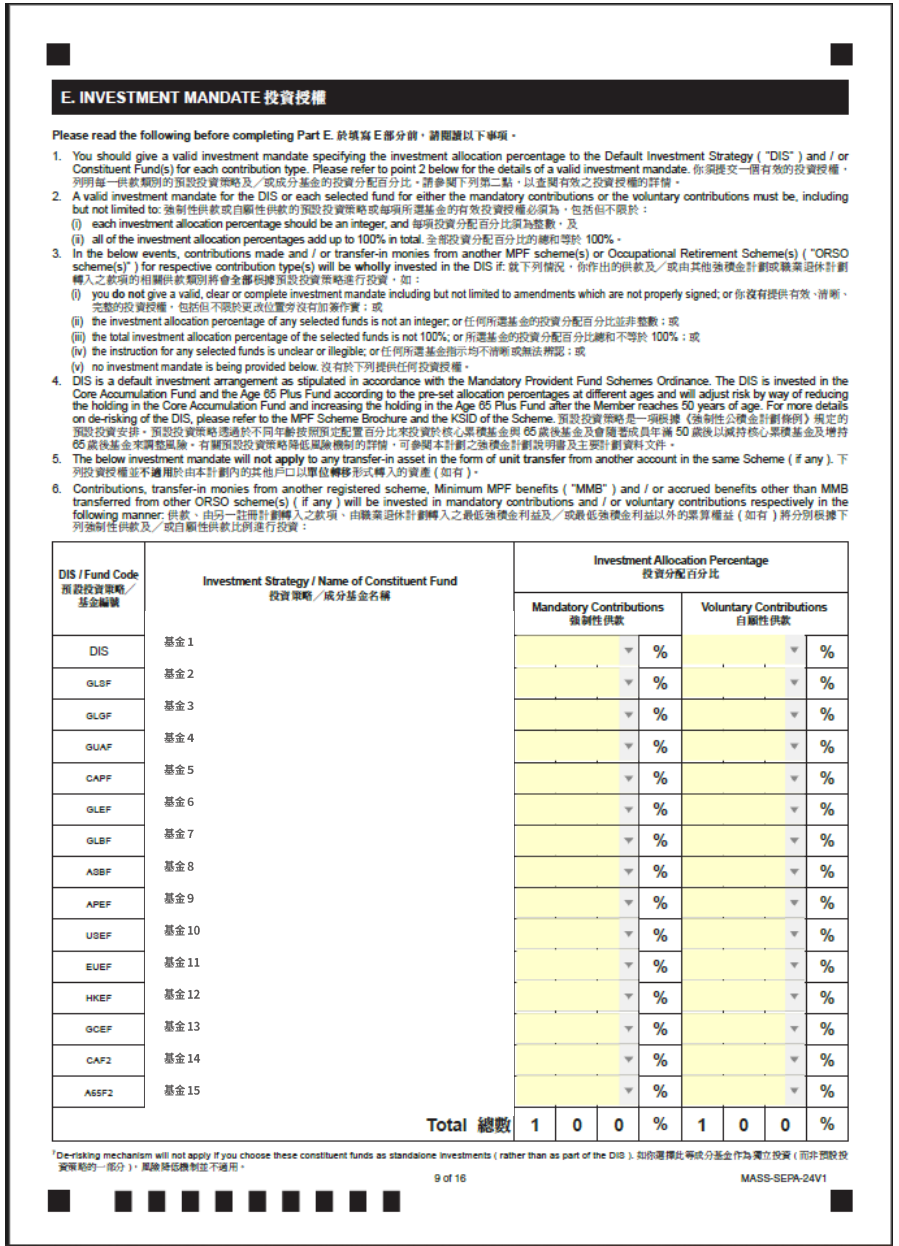
積金易助理介面

範例二: 為成員登記強積金帳戶

ii. 自僱人士申請表格

所需資料:

A. 成員資料
B. 營業資料
C. 計劃及供款詳情
D. 稅務居民身分自我證明
E. 投資授權
F. 個人資料收集聲明
G. 授權及聲明



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 should give a valid investment mandate specifying the investment allocation percentage to the Default Investment Strategy ("DIS") and / or Constituent Fund(s) for each contribution type. Please refer to point 2 below for the details of a valid investment mandate. 你須提交一個有效的投資授權，列明每一供款類別的預設投資策略及／或成分基金的投資分配百分比，請參閱下列第二點，以查閱有效之投資授權的詳情。
2. 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 每項投資分配百分比須為整數，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%。
3. 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 **wholly** invested in the DIS if: 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全部根據預設投資策略進行投資，如：
   (i) you **do not** give a valid, clear or complete investment mandate including but not limited to amendments which are not properly signed; or 你沒有提供有效、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
   (ii) the investment allocation percentage of any selected funds is not an integer; or 任何所選基金的投資分配百分比並非整數；或
   (iii) the total investment allocation percentage of the selected funds is not 100%; or 所選基金的投資分配百分比總和不等於 100%；或
   (iv) the instruction for any selected funds is unclear or illegible; or 任何所選基金指示均不清晰或無法辨認；或
   (v) no investment mandate is being provided below. 沒有於下列提供任何投資授權。
4. 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。
5. The below investment mandate **will not apply** to any transfer-in asset in the form of **unit transfer** from another account in the same Scheme (if any). 下列投資授權並**不適用**於由本計劃內的其他戶口以**單位轉移**形式轉入的資產 (如有)。
6. Contributions, transfer-in monies from another registered scheme, Minimum MPF benefits ("MMB") and / or accrued benefits other than MMB transferred from other ORSO scheme(s) (if any) will be invested in mandatory contributions and / or voluntary contributions respectively in the following manner: 供款、由另一註冊計劃轉入之款項、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) 將分別根據下列強制性供款及／或自願性供款比例進行投資：

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							
		Mandatory Contributions 強制性供款				Voluntary Contributions 自願性供款			
DIS	基金 1				%				%
GLSF	基金 2				%				%
GLGF	基金 3				%				%
GUAF	基金 4				%				%
CAPF	基金 5				%				%
GLEF	基金 6				%				%
GLBF	基金 7				%				%
ASBF	基金 8				%				%
APEF	基金 9				%				%
USEF	基金 10				%				%
EUEF	基金 11				%				%
HKEF	基金 12				%				%
GCEF	基金 13				%				%
CAF2	基金 14				%				%
A65F2	基金 15				%				%
	Total 總數	1	0	0	%	1	0	0	%

[1]De-risking mechanism will not apply if you choose these constituent funds as standalone investments (rather than as part of the DIS). 如你選擇此等成分基金作為獨立投資 (而非預設投資策略的一部分)，風險降低機制並不適用。

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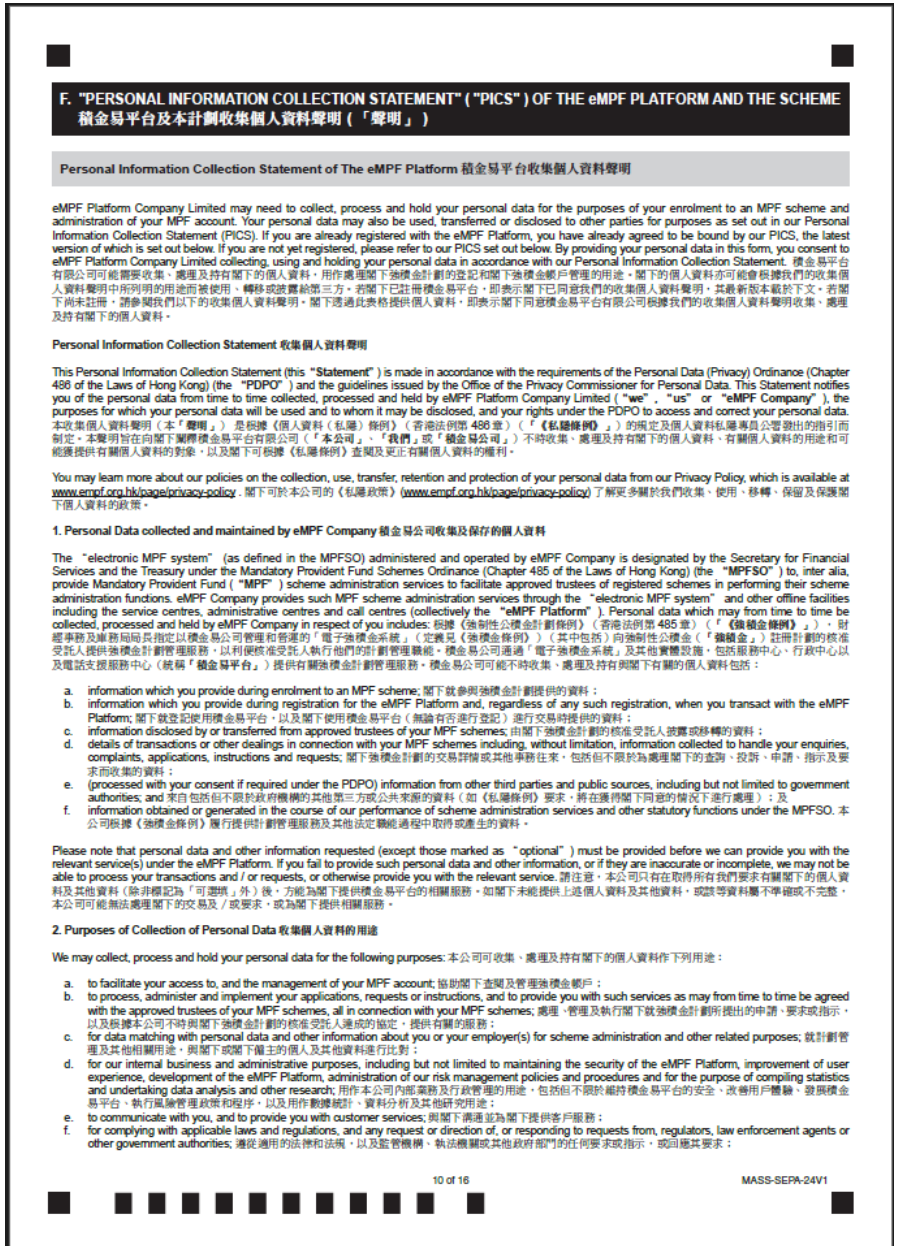
積金易助理介面

範例二: 為成員登記強積金帳戶

ii. 自僱人士申請表格

所需資料:

A. 成員資料
B. 營業資料
C. 計劃及供款詳情
D. 稅務居民身分自我證明
E. 投資授權
F. 個人資料收集聲明
G. 授權及聲明



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、處理及持有閣下的個人資料，用作處理閣下強積金計劃的登記和閣下強積金帳戶管理的用途。閣下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。若閣下已註冊積金易平台，即表示閣下已同意我們的收集個人資料聲明，其最新版本載於下文。若閣下尚未註冊，請參閱我們以下的收集個人資料聲明。閣下透過此表格提供個人資料，即表示閣下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、處理及持有閣下的個人資料。

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。本聲明旨在向閣下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、處理及持有閣下的個人資料、有關個人資料的用途和可能獲提供有關個人資料的對象，以及閣下可根據《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 . 閣下可於本公司的《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、保留及保護閣下個人資料的政策。

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、處理及持有與閣下有關的個人資料包括：

a. information which you provide during enrolment to an MPF scheme; 閣下就參與強積金計劃提供的資料；
b. information which you provide during registration for the eMPF Platform and, regardless of any such registration, when you transact with the eMPF Platform; 閣下就登記使用積金易平台，以及閣下使用積金易平台（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; 由閣下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; 閣下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閣下的查詢、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，將在獲得閣下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閣下的個人資料及其他資料（除非標記為「可選擇」外）後，方能為閣下提供積金易平台的相關服務。如閣下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閣下的交易及 / 或要求，或為閣下提供相關服務。

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、處理及持有閣下的個人資料作下列用途：

a. to facilitate your access to, and the management of your MPF account; 協助閣下查閱及管理強積金帳戶；
b. 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、管理及執行閣下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閣下強積金計劃的核准受託人達成的協定，提供有關的服務；
c. 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，與閣下或閣下僱主的個人及其他資料進行比對；
d. 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；
e. to communicate with you, and to provide you with customer services; 與閣下溝通並為閣下提供客戶服務；
f. 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；

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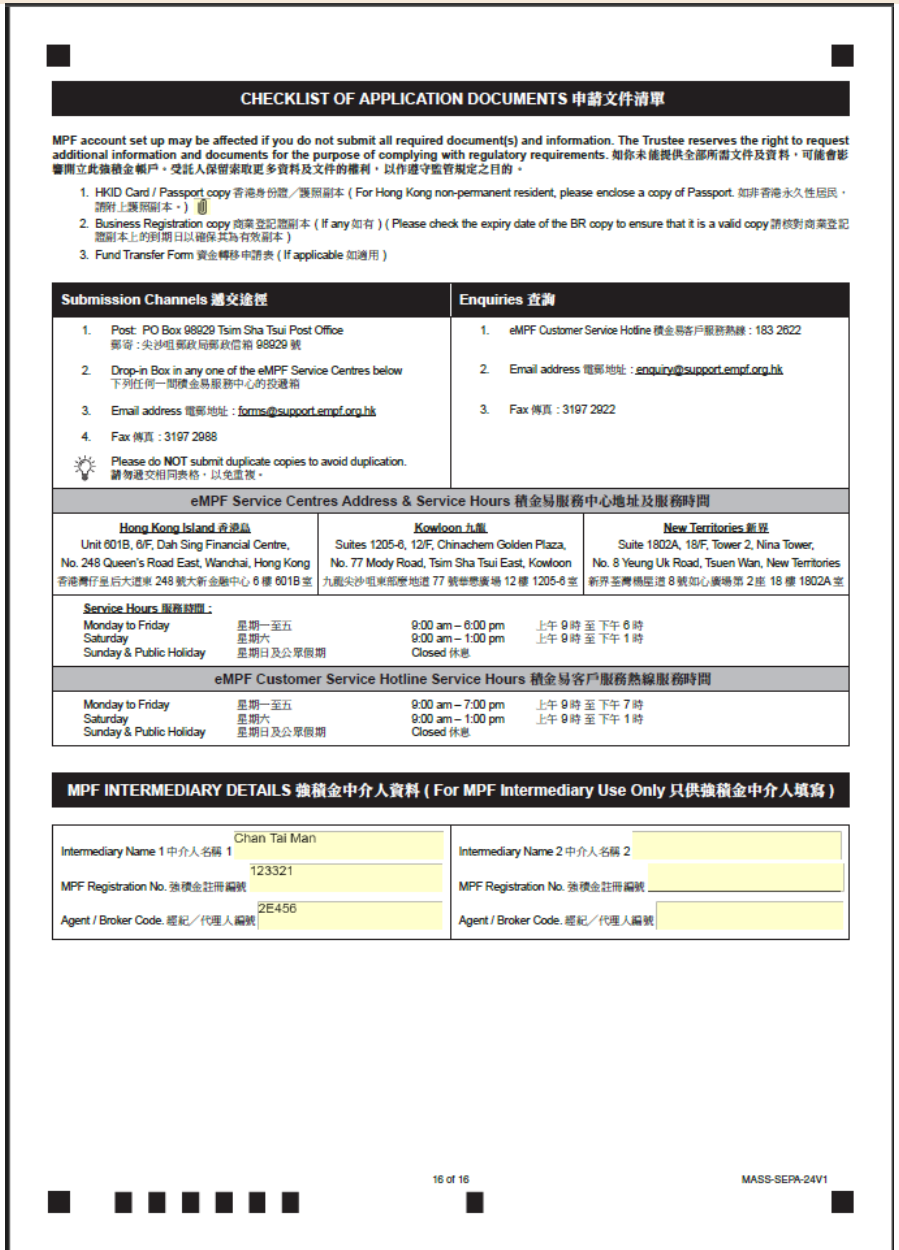
積金易助理介面

範例二: 為成員登記強積金帳戶

ii. 自僱人士申請表格

所需資料:

A. 成員資料
B. 營業資料
C. 計劃及供款詳情
D. 稅務居民身分自我證明
E. 投資授權
F. 個人資料收集聲明
G. 授權及聲明



CHECKLIST OF APPLICATION DOCUMENTS 申請文件清單

MPF account set up 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. HKID Card / Passport copy 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. Business Registration copy 商業登記證副本 (If any 如有) (Please check the expiry date of the BR copy to ensure that it is a valid copy 請核對商業登記證副本上的到期日以確保其為有效副本)
3. Fund Transfer Form 資金轉移申請表 (If applicable 如適用)

Submission Channels 遞交途徑	Enquiries 查詢
1. Post: PO Box 98829 Tsim Sha Tsui Post Office 郵寄：尖沙咀郵政局郵政信箱 98829 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	Chan Tai Man	Intermediary Name 2 中介人名稱 2	
MPF Registration No. 強積金註冊編號	123321	MPF Registration No. 強積金註冊編號	
Agent / Broker Code. 經紀／代理人編號	2E456	Agent / Broker Code. 經紀／代理人編號	

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MASS-SEPA-24V1

積金易助理介面

範例二: 為成員登記強積金帳戶

iii. 特別自願性供款帳戶申請表

所需資料:

A. 成員資料
B. 計劃及供款詳情
C. 資金來源
D. 付款方法
E. 稅務居民身分自我證明
F. 投資授權
G. 個人資料收集聲明
H. 授權及聲明



強積金計劃 A

強積金計劃 A
特別自願性供款帳戶申請表格

SVCA

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:

SVCA

PARTICIPATION AGREEMENT FOR SPECIAL VOLUNTARY CONTRIBUTIONS ACCOUNT MEMBER
特別自願性供款帳戶成員參與協議

BETWEEN 有關雙方 :
(1) YF LIFE TRUSTEES LIMITED, whose registered office is at 27/F, YF Life Tower, 33 Lockhart Road, Wanchai, Hong Kong (the "Trustee"); and
萬通信託有限公司，其註冊辦事處位於香港灣仔駱克道 33 號萬通保險大廈 27 樓（下稱「受託人」）；及

(2) The Member, whose name and address are given in the MASS Mandatory Provident Fund Scheme – Special Voluntary Contributions ("SVC") Account Member Application Form ("Application Form") attached hereto.
成員，其名稱及地址填寫在萬全強制性公積金計劃 – 特別自願性供款成員申請表（下稱「申請表」）內。

RECITALS 敘文 :
(A) The Trustee is the Trustee of the MASS Mandatory Provident Fund Scheme (the "Master Trust Scheme"), which was established by a Trust Deed ("the Deed") dated 27 January 2000 made by the Trustee as amended from time to time.
萬全強制性公積金計劃（下稱「集成信託計劃」）依據於 2000 年 1 月 27 日由其受託人以不時修改的信託契約（下稱「有關契約」）成立，受託人為集成信託計劃的受託人。

(B) The Member wishes to join the Master Trust Scheme in order to establish a retirement benefits scheme (the "Scheme") for his or her own benefit as a special voluntary contributions account member.
成員希望以特別自願性供款帳戶成員參與集成信託計劃，用以成立為保障其利益之退休保障計劃（下稱「本計劃」）。

(C) The Participating Scheme shall be governed by the Deed and this Participation Agreement.
參與計劃將受有關契約及本參與協議規限。

PROVISIONS 條文 :
1. Unless otherwise stated, words and expressions used in this Participation Agreement (including the Recitals) shall have the meanings given to them in the Deed.
除非另有規定，本參與協議中使用的文字和表述（包括敘文）應具有有關契約所給予的涵義。

2. The Member hereby establishes a Scheme with effect from the Date of Joining the Scheme specified in the Application Form, to be governed by the terms of the Deed and this Participation Agreement.
成員現成立一個計劃，於申請表的參加計劃日期起生效，並受有關契約及本參與協議的條款規限。

3. The Member hereby covenants with the Trustee to comply with and be bound by the provisions of the Deed and this Participation Agreement and all applicable laws and regulations.
成員現向受託人契諾遵守有關契約及本參與協議及所有適用法律和法例的規定並受其約束。

4. The Member warrants that the information from time to time to be provided by the Member in relation to Investment Mandates, Switching Instruction Forms and otherwise will be correct in all respects.
成員保證，由參與成員就不時提供的投資授權、轉換指令表格及其他資料在所有方面均是正確的。

5. Subject to the provisions of the Deed and this Participation Agreement, the Member undertakes and agrees to hold the Trustee indemnified against any and all proceeding, costs, charges, liabilities and expenses occasioned by any and all actions, claims, demands or proceedings in connection with the Master Trust Scheme or the Scheme either:
在有關契約及本參與協議條款的規限下，成員承諾且同意，對於任何和所有訴訟、訟費、收費、債項和開支，只要上述各項是因發生下列事件而引起與集成信託計劃或本計劃有關的任何和所有法律行動、索償、要求或法律訴訟所導致的，一概會向受託人作出賠償：
(a) arising out of the breach by the Member of the warranty referred to in paragraph 4; or
因成員違反第 4 條所述的保證而引起的；或
(b) as a result of any failure or omission on the part of the Member to duly and punctually perform or observe any obligations pursuant to the Deed and this Participation Agreement or otherwise so far as they relate to theMember.
因成員未能妥善及準時地履行或遵守依據有關契約及本參與協議之任何責任或與成員相關之責任所造成的失誤或遺漏。

6. The Member undertakes and agrees to pay all fees and expenses which are payable by it under the terms of the Deed and this Participation Agreement.
成員承諾且同意支付其在有關契約及本參與協議條款下應該支付的所有費用和開支。

7. The Member hereby acknowledges that :
成員確認 :
(a) He/she is aware that YF Life Insurance International Ltd. ("YF Life") is the promoter of the Master Trust Scheme and its registered office is at 27/F, YF Life Tower, 33 Lockhart Road, Wanchai, Hong Kong. YF Life, the immediate holding company of the Trustee, is a registered principal intermediary with the Mandatory Provident Fund Schemes Authority (MPF Registration No.: IC000218) and is carrying on life insurance business.
他 / 她已得悉萬通保險國際有限公司（下稱「萬通保險」）是集成信託計劃的推銷商，其註冊辦事處位於香港灣仔駱克道 33 號萬通保險大廈 27 樓，作為受託人的直屬控股公司，萬通保險是強制性公積金計劃管理局的註冊主事中介人（強積金中介人註冊號碼：IC000218），主要經營人壽保險業務。
(b) The registered subsidiary intermediary ("Intermediary") mentioned in the Application Form, completed for the Member for the purpose of joining the Master Trust Scheme, is appointed by YF Life to distribute the Master Trust Scheme, and to invite and induce another person to make a material decision related to the matters set out in section 34F(5) of the Mandatory Provident Fund Schemes (Amendment) Ordinance 2012.
為參與集成信託計劃，替成員填妥的申請表當中提及的註冊強制性公積金附屬中介人（下稱「中介人」）是由萬通保險委任，負責分發集成信託計劃及邀請和誘使其他人士作出與 2012 年強制性公積金（修訂）條例第 34F(5) 條中所述的事項有關的重要決定。

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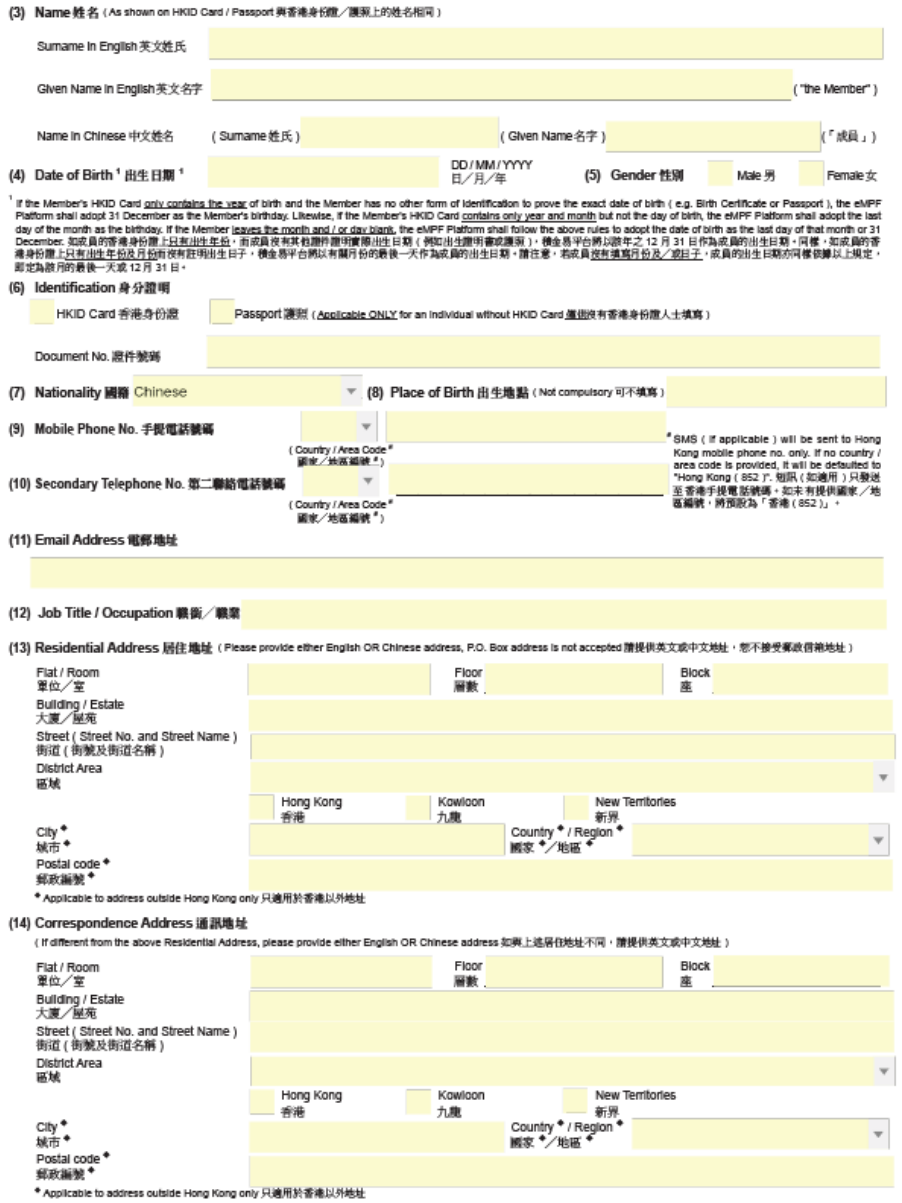
積金易助理介面

iii. 特別自願性供款帳戶申請表

所需資料:

A. 成員資料
B. 計劃及供款詳情
C. 資金來源
D. 付款方法
E. 稅務居民身分自我證明
F. 投資授權
G. 個人資料收集聲明
H. 授權及聲明



(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

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

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

(4) Date of Birth [1] 出生日期 [1] 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，而成員沒有其他證明實際出生日期 (例如出生證明書或護照)，積金易平台將以當年之 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。

(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)

Document No. 證件號碼

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

(9) Mobile Phone No. 手提電話號碼 (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)」。

(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

(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 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

(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

積金易助理介面

範例二: 為成員登記強積金帳戶

iii. 特別自願性供款帳戶申請表

所需資料:

A. 成員資料
B. 計劃及供款詳情
C. 資金來源
D. 付款方法
E. 稅務居民身分自我證明
F. 投資授權
G. 個人資料收集聲明
H. 授權及聲明



B. CONTRIBUTION DETAILS 供款詳情

Please choose appropriate 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

Regular Contribution Start Date [2] 定期供款開始日期 [2] — DD / MM / YYYY 日／月／年

Monthly Regular Contribution Amount [3] 每月定期供款金額 [3] — HKD 港幣 0 元

- The minimum monthly contribution amount is HKD100. 按月供款的最低供款金額為港幣100元 .

(2) Lump Sum Contribution Amount [3] 整筆供款金額 [3] — HKD 港幣 0 元

- The minimum lump sum contribution amount is HKD500. 整筆供款的最低供款金額為港幣500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帳生效日開始 (如首次供款以直接扣帳繳付) , 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. 請於下列 D 部分填寫付款方法 .

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) . 積金易平台會根據其個情況要求提供額外文件 .

(1) Salary 薪金
- Monthly salary 月薪: 0

(2) Personal savings 個人儲蓄
- Name of bank 銀行名稱
- Total amount 總金額: 0

(3) Investment holdings 持有投資
- Description of investment 投資說明
- Value of investment 投資價值: 0

(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: 0

(5) Sale of property 出售物業
- Address of property 物業地址
- Sales proceed 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: 0
- Date of receipt 收款日期

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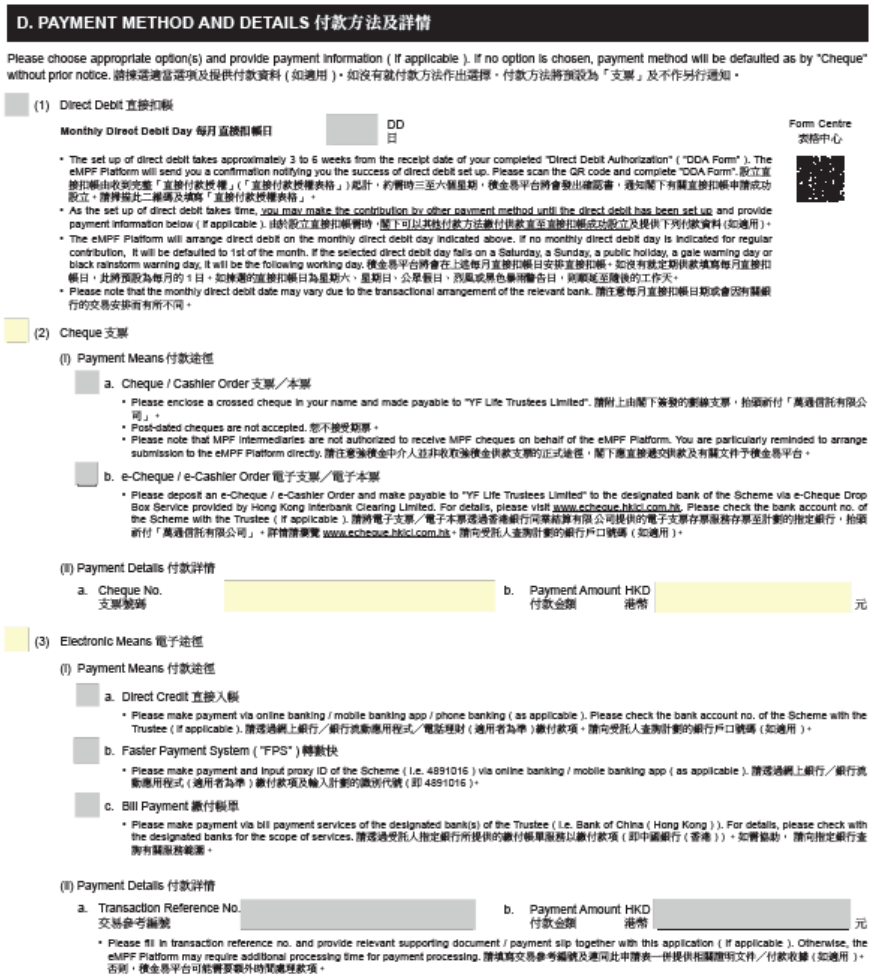
積金易助理介面

範例二: 為成員登記強積金帳戶

iii. 特別自願性供款帳戶申請表

所需資料:

A. 成員資料
B. 計劃及供款詳情
C. 資金來源
D. 付款方法
E. 稅務居民身分自我證明
F. 投資授權
G. 個人資料收集聲明
H. 授權及聲明



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 直接扣賬

Monthly Direct Debit Day 每月直接扣賬日 ____ DD 日

Form Centre 表格中心

- The set up 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 set up. Please scan 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，通知閣下有關直接扣賬申請成功設立，請將填妥二維碼及填寫「直接付款授權表格」 •
- As the set up 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，閣下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) •
- The eMPF Platform will arrange direct debit on the monthly direct debit day indicated above. If no monthly direct debit day is indicated for regular contribution, it will be defaulted to 1st of the month. If the selected direct debit day falls on a Saturday, a Sunday, 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直接扣賬日安排直接扣賬。如沒有就定期供款填寫每月直接扣賬日，此將預設為每月的 1 日。如揀選的直接扣賬日為星期六、星期日、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 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 •

(2) Cheque 支票

(I) Payment Means 付款途徑

a. Cheque / Cashier Order 支票／本票
- Please enclose a crossed cheque in your name and made payable to "YF Life Trustees Limited". 請附上由閣下簽發的劃線支票，抬頭前付「萬通信託有限公司」 •
- 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，閣下應直接遞交供款及有關文件予積金易平台 •

b. e-Cheque / e-Cashier Order 電子支票／電子本票
- Please deposit an e-Cheque / e-Cashier Order and make payable to "YF Life Trustees Limited" to the designated bank of the Scheme via e-Cheque Drop Box Service provided by Hong Kong Interbank Clearing Limited. For details, please visit www.echeque.hkicl.com.hk. Please check the bank account no. of the Scheme with the Trustee (if applicable). 請將電子支票／電子本票透過香港銀行同業結算有限公司提供的電子支票存票服務存票至計劃的指定銀行，抬頭前付「萬通信託有限公司」，詳情請瀏覽 www.echeque.hkicl.com.hk。請向受託人查詢計劃的銀行戶口號碼 (如適用) •

(II) Payment Details 付款詳情

a. Cheque No. 支票號碼 ____ b. Payment Amount 付款金額 HKD 港幣 ____ 元

(3) Electronic Means 電子途徑

(I) Payment Means 付款途徑

a. Direct Credit 直接入賬
- 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) •

b. Faster Payment System ("FPS") 轉數快
- Please make payment and input proxy ID of the Scheme (i.e. 4891016) via online banking / mobile banking app (as applicable). 請透過網上銀行／銀行流動應用程式 (適用者為準) 繳付款項及輸入計劃的識別代號 (即 4891016) •

c. 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)). 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)) • 如需協助，請向指定銀行查詢有關服務範圍 •

(II) Payment Details 付款詳情

a. Transaction Reference No. 交易參考編號 ____ b. Payment Amount 付款金額 HKD 港幣 ____ 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 •

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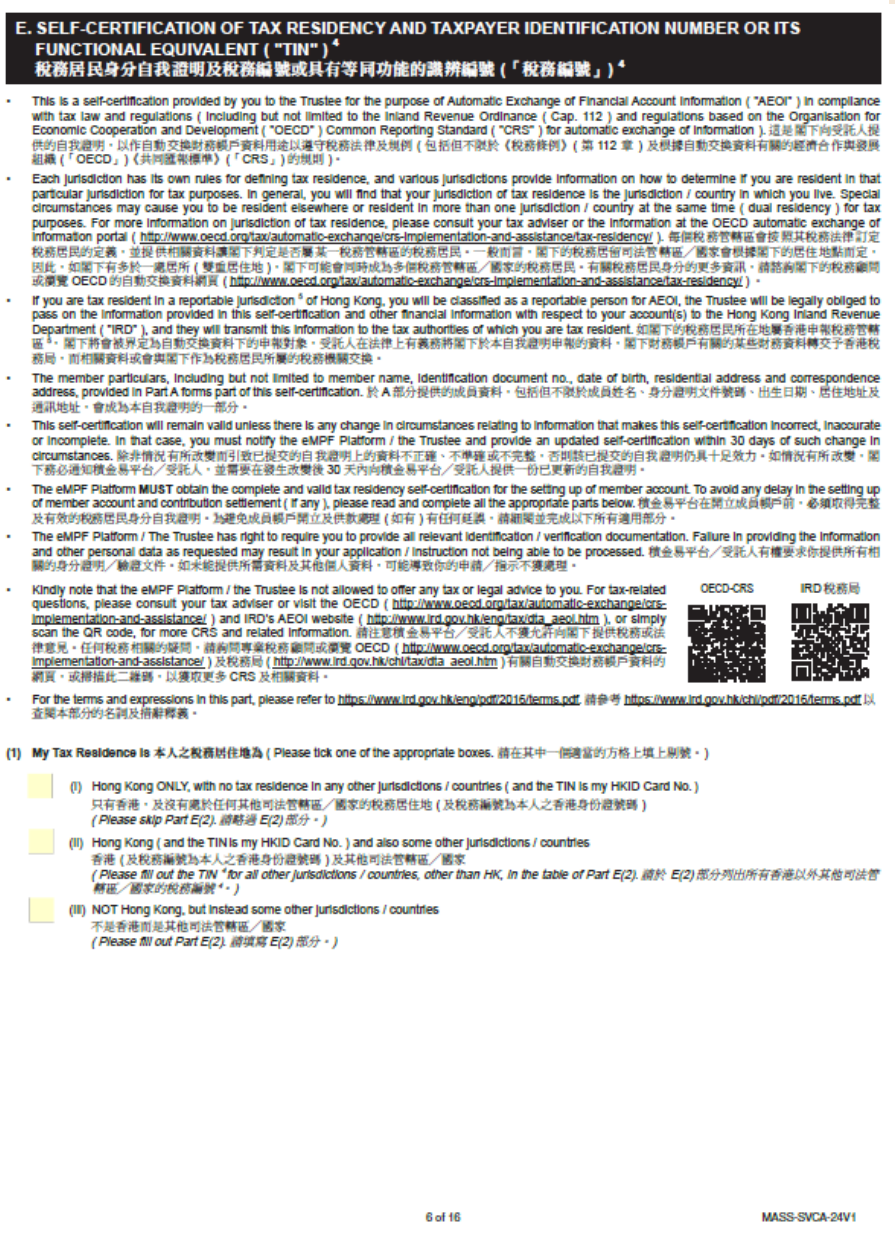
積金易助理介面

範例二: 為成員登記強積金帳戶

iii. 特別自願性供款帳戶申請表

所需資料:

A. 成員資料
B. 計劃及供款詳情
C. 資金來源
D. 付款方法
E. 稅務居民身分自我證明
F. 投資授權
G. 個人資料收集聲明
H. 授權及聲明



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). 這是閣下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)。
- 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，並提供相關資料讓閣下判定是否屬某一稅務管轄區的稅務居民。一般而言，閣下的稅務居留司法管轄區／國家會根據閣下的居住地點而定，因此，如閣下有多於一處居所 (雙重居住地)，閣下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，請諮詢閣下的稅務顧問或瀏覽 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. 如閣下的稅務居民所在地屬香港申報稅務管轄區 [5]，閣下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閣下於本自我證明申報的資料，閣下財務帳戶有關的某些財務資料轉交予香港稅務局，而相關資料或會與閣下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. In that case, 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，閣下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／受託人不獲允許向閣下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。

(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。)

☐ (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 [6] 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 [6]。)

☐ (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。)

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積金易助理介面

範例二: 為成員登記強積金帳戶

iii. 特別自願性供款帳戶申請表

所需資料:

A. 成員資料
B. 計劃及供款詳情
C. 資金來源
D. 付款方法
E. 稅務居民身分自我證明
F. 投資授權
G. 個人資料收集聲明
H. 授權及聲明

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 should give a valid investment mandate specifying the investment allocation percentage to the Default Investment Strategy ("DIS") and / or Constituent Fund(s). Please refer to point 2 below for the details of a valid investment mandate. 你須提交一個有效的投資授權，列明預設投資策略及／或成分基金的投資分配百分比。請參閱下列第二點，以查閱有效之投資授權的詳情。
2. 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 每項投資分配百分比須為整數，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%。
3. In the below events, contributions made will be **wholly** invested in the DIS if: 就下列情況，你作出的供款將會全部根據預設投資策略進行投資，如：
   (I) you **do not** give a valid, clear or complete investment mandate including but not limited to amendments which are not properly signed; or 你**沒有**提供有效、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
   (II) the investment allocation percentage of any selected funds is not an integer; or 任何所選基金的投資分配百分比並非整數；或
   (III) the total investment allocation percentage of the selected funds is not 100%; or 所選基金的投資分配百分比總和不等於 100%；或
   (IV) the instruction for all the selected funds is unclear or illegible; or 全部所選基金指示均不清晰或無法辨認；或
   (V) no investment mandate is being provided below. 沒有於下列提供任何投資授權。
4. 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。
5. Contributions will be invested in the following manner: 供款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	
DIS	基金 1		%
GLSF	基金 2		%
GLGF	基金 3		%
GUAF	基金 4		%
CAPF	基金 5		%
GLEF	基金 6		%
GLBF	基金 7		%
ASBF	基金 8		%
APEF	基金 9		%
USEF	基金 10		%
EUEF	基金 11		%
HKEF	基金 12		%
GCEF	基金 13		%
CAF2	基金 14		%
A65F2	基金 15		%
	Total 總數	1 0 0	%

† De-risking mechanism will not apply if you choose these constituent funds as standalone investments (rather than as part of the DIS). 如你選擇此等成分基金作為獨立投資（而非預設投資策略的一部分），降險機制並不適用。

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積金易助理介面

範例二: 為成員登記強積金帳戶

iii. 特別自願性供款帳戶申請表

所需資料:

A. 成員資料
B. 計劃及供款詳情
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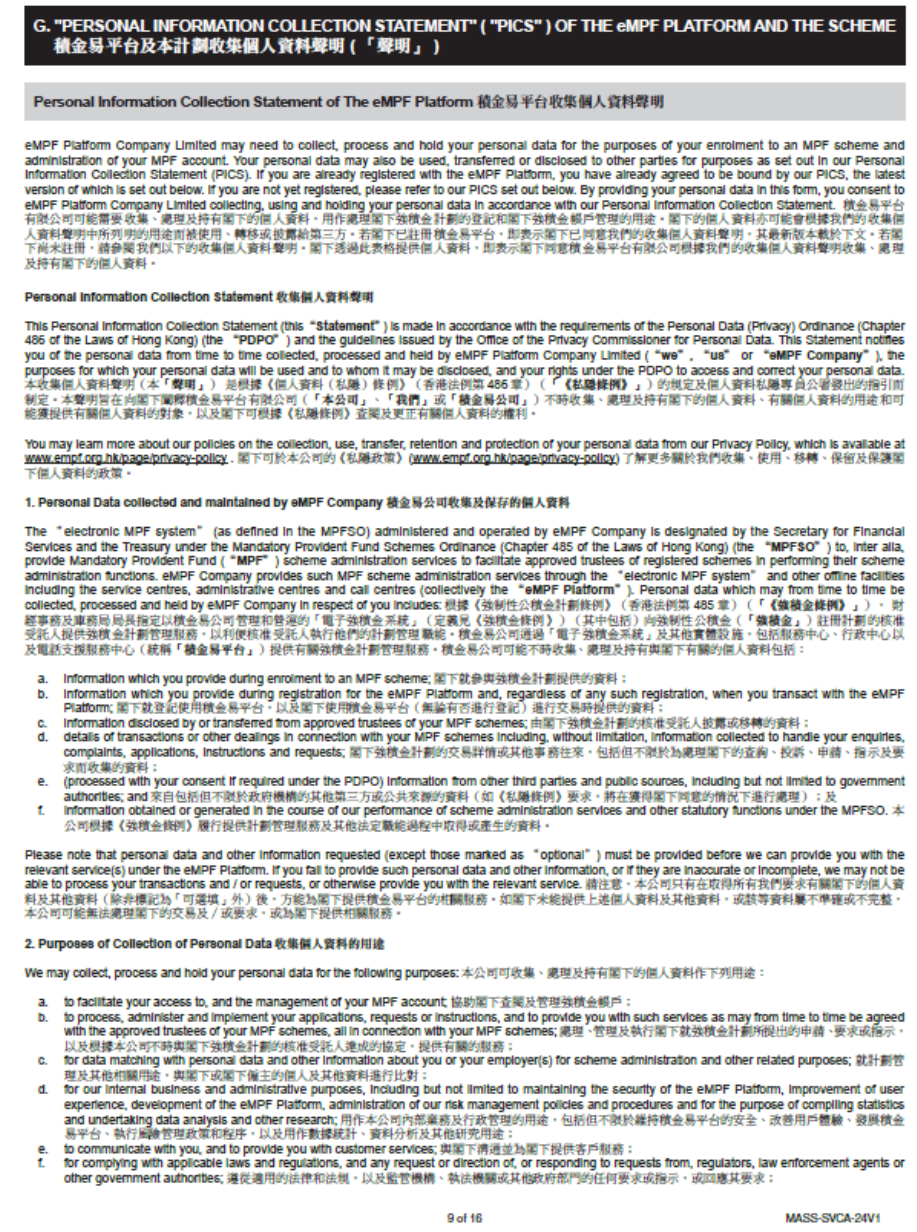
E. 稅務居民身分自我證明
F. 投資授權
G. 個人資料收集聲明
H. 授權及聲明



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、處理及持有閣下的個人資料，用作處理閣下強積金計劃的登記和閣下強積金帳戶管理的用途。閣下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。若閣下已註冊積金易平台，即表示閣下已同意我們的收集個人資料聲明。其最新版本載於下文。若閣下尚未註冊，請參閱我們以下的收集個人資料聲明。閣下透過此表格提供個人資料，即表示閣下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、處理及持有閣下的個人資料。

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。本聲明旨在向閣下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、處理及持有閣下的個人資料、有關個人資料的用途和可能獲提供有關個人資料的對象，以及閣下可根據《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. 閣下可於本公司的《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、保留及保護閣下個人資料的政策。

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，積金易公司透過「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、處理及持有與閣下有關的個人資料包括：

a. Information which you provide during enrolment to an MPF scheme; 閣下就參與強積金計劃提供的資料；
b. Information which you provide during registration for the eMPF Platform and, regardless of any such registration, when you transact with the eMPF Platform; 閣下就登記使用積金易平台，以及閣下使用積金易平台（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; 由閣下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; 閣下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閣下的查詢、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，將在獲得閣下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閣下的個人資料及其他資料（除非標記為「可選填」外）後，方能為閣下提供積金易平台的相關服務。如閣下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閣下的交易及 / 或要求，或為閣下提供相關服務。

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、處理及持有閣下的個人資料作下列用途：

a. to facilitate your access to, and the management of your MPF account; 協助閣下查閱及管理強積金帳戶；
b. 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、管理及執行閣下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閣下強積金計劃的核准受託人達成的協定，提供有關的服務；
c. 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，與閣下或閣下僱主的個人及其他資料進行比對；
d. 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；
e. to communicate with you, and to provide you with customer services; 與閣下溝通並為閣下提供客戶服務；
f. 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；

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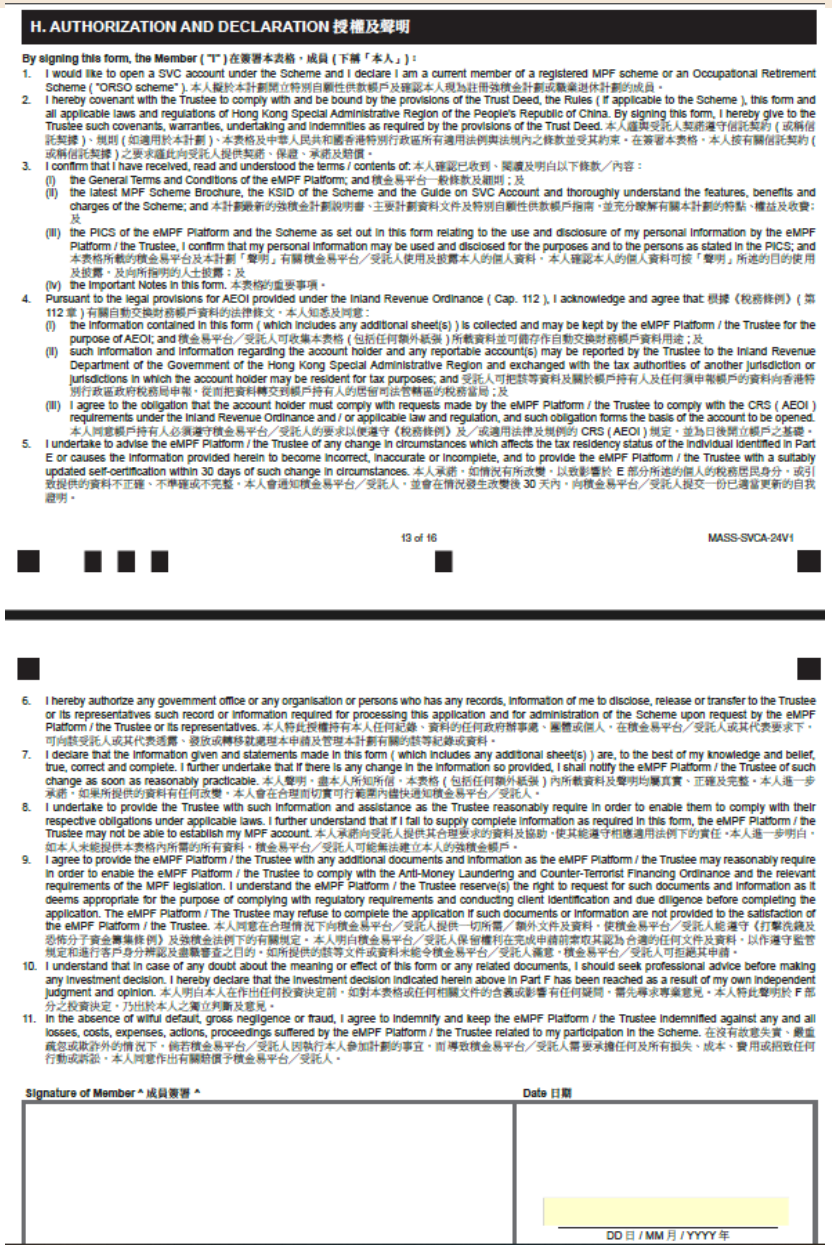
積金易助理介面

範例二: 為成員登記強積金帳戶

iii. 特別自願性供款帳戶申請表

所需資料:

A. 成員資料
B. 計劃及供款詳情
C. 資金來源
D. 付款方法
E. 稅務居民身分自我證明
F. 投資授權
G. 個人資料收集聲明
H. 授權及聲明



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 SVC account under the Scheme and I declare I am a current member of a registered MPF scheme or an Occupational Retirement Scheme ("ORSO scheme"). 本人擬於本計劃開立特別自願性供款帳戶及確認本人現為註冊強積金計劃或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 SVC 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特別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. 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) 所載資料並可儲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可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 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。

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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盡快通知積金易平台／受託人。
8. I undertake to provide the Trustee with such information and assistance as the Trustee reasonably require in order to enable them to comply with their respective obligations under applicable laws. I further 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. 本人承諾向受託人提供其合理要求的資料及協助，使其能遵守相應適用法例下的責任。本人進一步明白，如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 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，當先尋求專業意見。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。
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**

DD 日 / MM 月 / YYYY 年

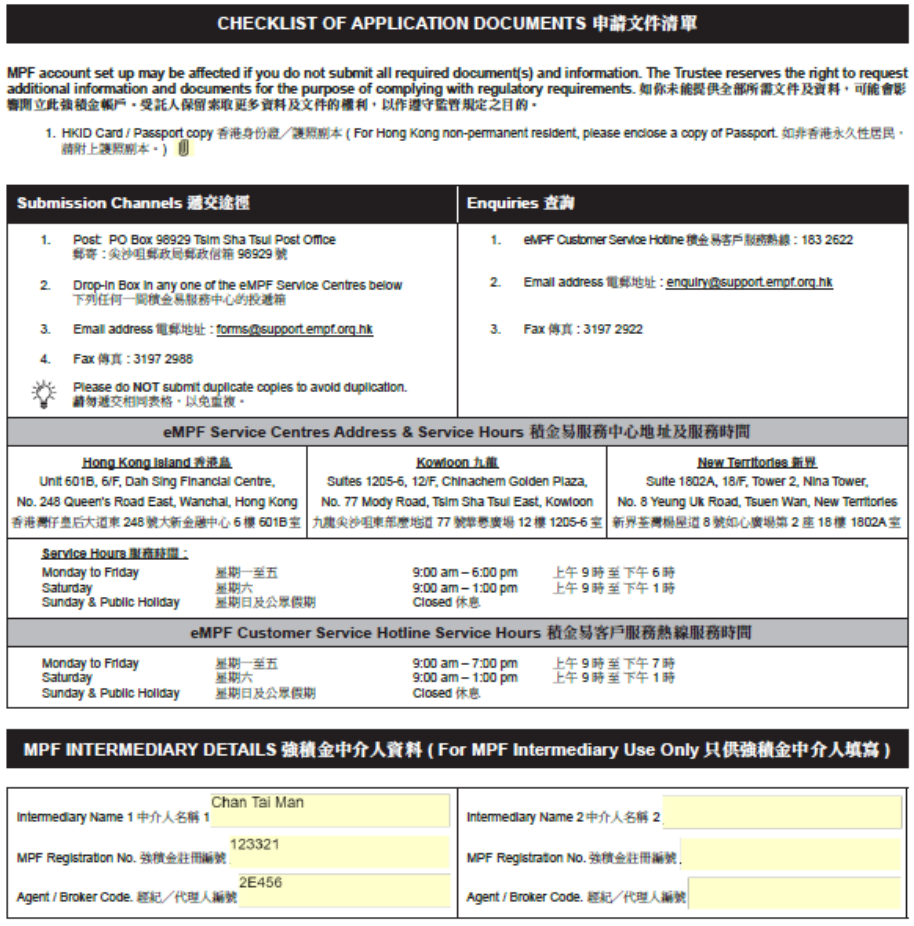
積金易助理介面

範例二: 為成員登記強積金帳戶

iii. 特別自願性供款帳戶申請表

所需資料:

A. 成員資料
B. 計劃及供款詳情
C. 資金來源
D. 付款方法
E. 稅務居民身分自我證明
F. 投資授權
G. 個人資料收集聲明
H. 授權及聲明



CHECKLIST OF APPLICATION DOCUMENTS 申請文件清單

MPF account set up 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. HKID Card / Passport copy 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: Chan Tai Man	Intermediary Name 2 中介人名稱 2:
MPF Registration No. 強積金註冊編號: 123321	MPF Registration No. 強積金註冊編號:
Agent / Broker Code. 經紀／代理人編號: 2E456	Agent / Broker Code. 經紀／代理人編號:

積金易助理介面

範例二: 為成員登記強積金帳戶

iv.個人帳戶持有人申請表

所需資料:

A. 成員資料
B. 稅務居民身分自我證明
C. 投資授權
D. 個人資料收集聲明
E. 授權及聲明



強積金計劃 A

強積金計劃 A
個人帳戶成員申請表

PAA

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

PARTICIPATION AGREEMENT FOR PERSONAL ACCOUNT MEMBER
個人帳戶成員參與協議

BETWEEN 有關雙方：
(1) YF LIFE TRUSTEES LIMITED, whose registered office is at 27/F, YF Life Tower, 33 Lockhart Road, Wanchai, Hong Kong (the "Trustee"); and
萬通信託有限公司，其註冊辦事處位於香港灣仔駱克道 33 號萬通保險大廈 27 樓（下稱「受託人」）；及

(2) The Applicant of Personal Account Member, whose name and address are given in the MASS Mandatory Provident Fund Scheme – Personal Account Member Application Form ("Application Form") attached hereto (the "PM").
個人帳戶成員申請人（下稱「參與成員」），其名稱及地址填寫在萬全強制性公積金計劃－個人帳戶成員申請表（下稱「申請表」）內。

RECITALS 敘文：
(A) The Trustee is the Trustee of the MASS Mandatory Provident Fund Scheme (the "Master Trust Scheme"), which was established by a Trust Deed ("the Deed") dated 27 January 2000 made by the Trustee as amended from time to time.
萬全強制性公積金計劃（下稱「集成信託計劃」）依據於 2000 年 1 月 27 日由其受託人以不時修改的信託契約（下稱「有關契約」）成立，受託人為集成信託計劃的受託人。

(B) The PM wishes to join the Master Trust Scheme in order to establish a retirement benefits scheme (the "Scheme") for his or her own benefit as a personal account member.
參與成員希望以個人帳戶成員參與集成信託計劃，用以成立為保障其利益之退休保障計劃（下稱「本計劃」）。

(C) The Scheme shall be governed by the Deed and this Participation Agreement.
本計劃將受有關契約及本參與協議規限。

PROVISIONS 條文：
1. Unless otherwise stated, words and expressions used in this Participation Agreement (including the Recitals) shall have the meanings given to them in the Deed.
除非另有規定，本參與協議中使用的文字和表述（包括敘文）應具有有關契約所給予的涵義。

2. The PM hereby establishes a Scheme with effect from the Date of Joining the Scheme specified in the Application Form, to be governed by the terms of the Deed and this Participation Agreement.
參與成員現成立一個計劃，於申請表的參加計劃日期起生效，並受有關契約及本參與協議的條款規限。

3. The PM hereby covenants with the Trustee to comply with and be bound by the provisions of the Deed and this Participation Agreement and all applicable laws and regulations.
參與成員現向受託人契諾遵守有關契約及本參與協議及所有適用法律和法例的規定並受其約束。

4. The PM warrants that the information from time to time to be provided by the PM in relation to Investment Mandates, Switching Instruction Forms and otherwise will be correct in all respects.
參與成員保證，由參與成員就不時提供的投資授權、轉換指令表格及其他資料在所有方面均是正確的。

5. Subject to the provisions of the Deed and this Participation Agreement, the PM undertakes and agrees to hold the Trustee indemnified against any and all proceeding, costs, charges, liabilities and expenses occasioned by any and all actions, claims, demands or proceedings in connection with the Master Trust Scheme or the Scheme either:
在有關契約及本參與協議條款的規限下，參與成員承諾且同意，對於任何和所有訴訟、訟費、收費、債項和開支，只要上述各項是因發生下列事件而引起與集成信託計劃或本計劃有關的任何和所有法律行動、索償、要求或法律訴訟所導致的，一概會向受託人作出賠償：
(a) arising out of the breach by the PM of the warranty referred to in paragraph 4; or
因參與成員違反第 4 條所述的保證而引起的；或
(b) as a result of any failure or omission on the part of the PM to duly and punctually perform or observe any obligations pursuant to the Deed and this Participation Agreement or otherwise so far as they relate to the PM.
因參與成員未經妥善及準時地履行或遵守依照有關契約及本參與協議之任何責任或與參與成員相關之責任所造成的失誤或遺漏。

6. The PM undertakes and agrees to pay all fees and expenses which are payable by it under the terms of the Deed and this Participation Agreement.
參與成員承諾且同意支付其在有關契約及本參與協議條款下應該支付的所有費用和開支。

7. The PM hereby acknowledges that :
參與成員確認：
(a) He/she is aware that YF Life Insurance International Ltd. ("YF Life") is the promoter of the Master Trust Scheme and its registered office is at 27/F, YF Life Tower, 33 Lockhart Road, Wanchai, Hong Kong. YF Life, the immediate holding company of the Trustee, is a registered principal intermediary with the Mandatory Provident Fund Schemes Authority (MPF Registration No.: IC000218) and is carrying on life insurance business.
他／她已得悉萬通保險國際有限公司（下稱「萬通保險」）是集成信託計劃的推銷商，其註冊辦事處位於香港灣仔駱克道 33 號萬通保險大廈 27 樓。作為受託人的直屬控股公司，萬通保險是強制性公積金計劃管理局的註冊主事中介人（強積金中介人註冊號碼：IC000218），主要經營人壽保險業務。
(b) The registered subsidiary intermediary ("Intermediary") mentioned in the Application Form, completed for the PM for the purpose of joining the Master Trust Scheme, is appointed by YF Life to distribute the Master Trust Scheme, and to invite and induce another person to make a material decision related to the matters set out in section 34F(5) of the Mandatory Provident Fund Schemes (Amendment) Ordinance 2012.
為參與集成信託計劃，替參與成員填妥的申請表當中提及的註冊強制性公積金附屬中介人（下稱「中介人」）是由萬通保險委任，負責分發集成信託計劃及邀請和誘使其他人士作出與 2012 年強制性公積金（修訂）條例第 34F(5) 條中所述的事項有關的重要決定。

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積金易助理介面

範例二: 為成員登記強積金帳戶

iv.個人帳戶持有人申請表

所需資料:

A. 成員資料
B. 稅務居民身分自我證明
C. 投資授權
D. 個人資料收集聲明
E. 授權及聲明



(c) The intermediary has provided his/ her business card to the PM.
中介人已向參與成員提供他 / 她的名片。
(d) In respect of the invitation and inducement mentioned in clause 7(b) hereinabove, the intermediary will be compensated by way of commission and/or other monetary benefits which will not be different depending on the choices of the constituent funds made by the PM.
就上述第 7(b) 條提及的邀請和誘使，中介人將會獲得佣金及 / 或其他金錢利益作為報酬，而該報酬不會因應參與成員對成分基金的選擇而有差異。

8. This Participation Agreement shall be terminated in accordance with Rule 19 of the Deed.
按照有關契約第 19 條，本參與協議可被終止。

9. The Application Form shall form part of this Participation Agreement.
申請表將構成本參與協議的一部份。

10. Subject to the approval of the Mandatory Provident Fund Scheme Authority, the Trustee can amend this Participating Agreement from time to time by way of notice to the PM before any proposed amendments shall take effect.
在強制性公積金計劃管理局給予批准的規限下，受託人可對本參與協議不時作出修改，但須在任何建議中的修訂向參與成員發出通知。

11. This Participation Agreement shall be governed by the laws of Hong Kong.
本參與協議應受香港法律約束。

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/MT00350_MASS_Mandatory_Provident_Fund_Scheme_EN.pdf#F) 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/MT00350_MASS_Mandatory_Provident_Fund_Scheme_CH.pdf#F) 或掃描以下列 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 advisors. 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 purpose of Automatic Exchange of Financial Account Information ("AEOI") and Common Reporting Standard ("CRS"). 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。

A. MEMBER PARTICULARS 成員資料

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

(1) Scheme Details 計劃資料

(I) Name of Trustee 受託人名稱 YF Life Trustees Limited 興證保誠有限公司 ("the Trustee" 「受託人」)

(II) Scheme Name 計劃名稱 MASS Mandatory Provident Fund Scheme 興全強制性公積金計劃 ("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

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

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

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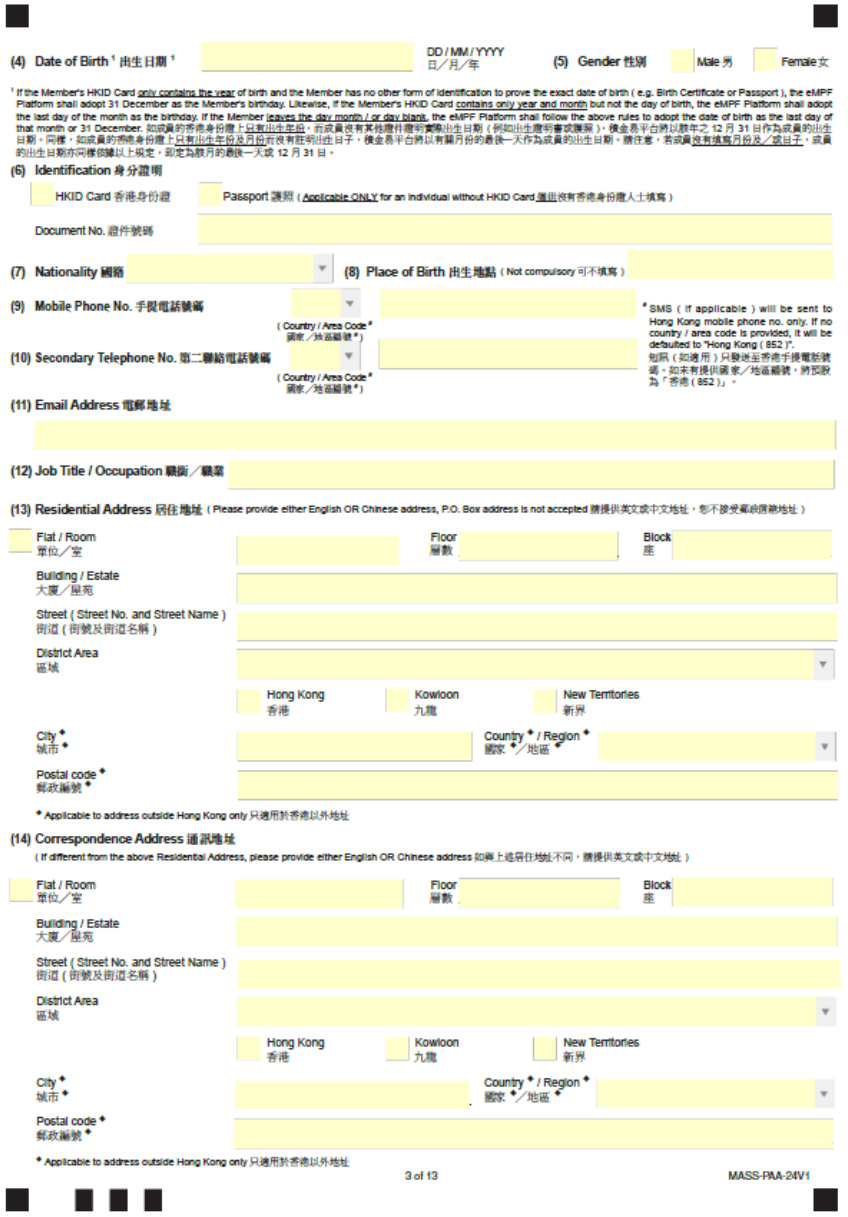
積金易助理介面

範例二: 為成員登記強積金帳戶

iv.個人帳戶持有人申請表

所需資料:

A. 成員資料
B. 稅務居民身分自我證明
C. 投資授權
D. 個人資料收集聲明
E. 授權及聲明



(4) Date of Birth [1] 出生日期 [1] 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 day month / 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其確出生日期（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。

(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)

Document No. 證件號碼

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

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

(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

(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 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

(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

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積金易助理介面

範例二: 為成員登記強積金帳戶

iv.個人帳戶持有人申請表

所需資料:

A. 成員資料
B. 稅務居民身分自我證明
C. 投資授權
D. 個人資料收集聲明
E. 授權及聲明

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). 這是閣下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)。
- 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，並提供相關資料讓閣下判定是否屬某一稅務管轄區的稅務居民。一般而言，閣下的稅務居留司法管轄區／國家會根據閣下的居住地點而定，因此，如閣下有多於一處居所 (雙重居住地)，閣下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，請諮詢閣下的稅務顧問或瀏覽 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. 如閣下的稅務居民所在地屬香港申報稅務管轄區 [3]，閣下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閣下於本自我證明申報的資料，閣下財務帳戶有關的某些財務資料轉交予香港稅務局，而相關資料或會與閣下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，閣下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／受託人不獲允許向閣下提供稅務或法律意見。任何稅務相關的疑問，請與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。)

☐ (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。)

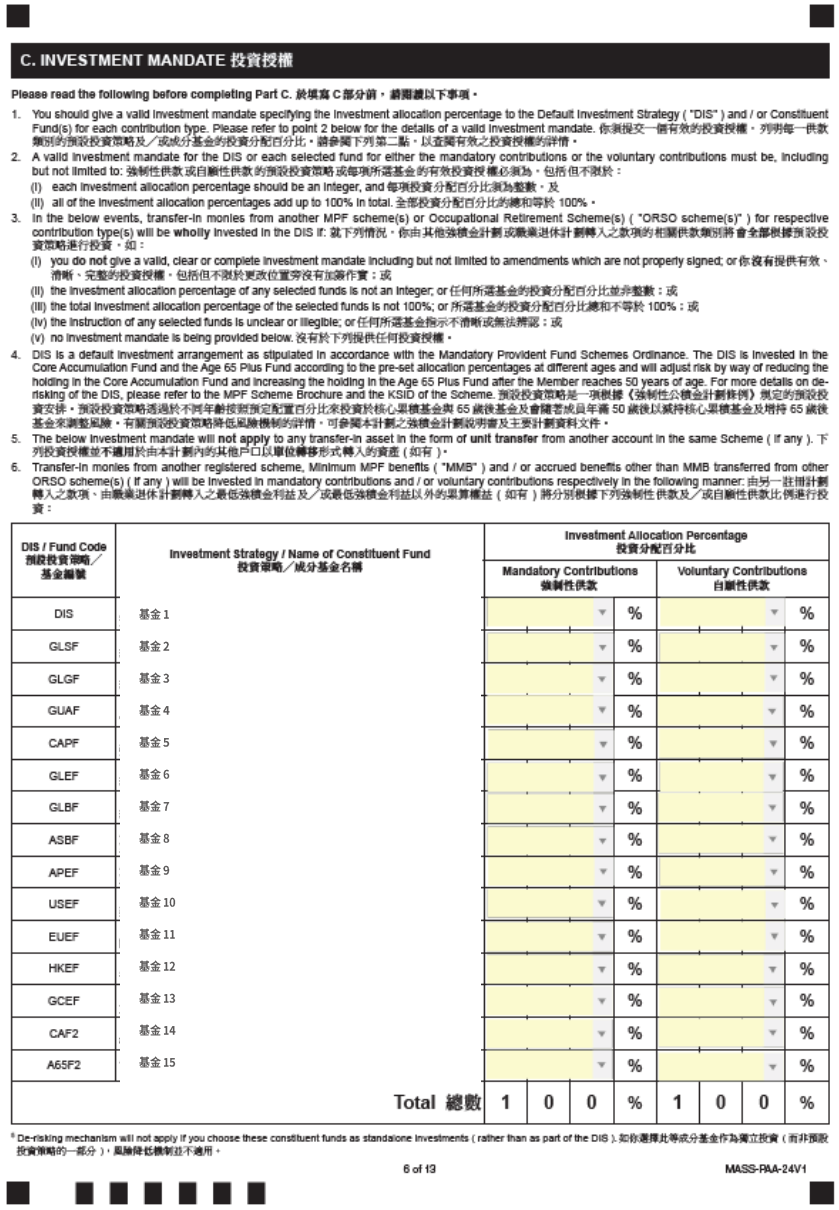
積金易助理介面

範例二: 為成員登記強積金帳戶

iv.個人帳戶持有人申請表

所需資料:

A. 成員資料
B. 稅務居民身分自我證明
C. 投資授權
D. 個人資料收集聲明
E. 授權及聲明



C. INVESTMENT MANDATE 投資授權

Please read the following before completing Part C. 於填寫 C 部分前，請細閱以下事項：

1. You should give a valid investment mandate specifying the investment allocation percentage to the Default Investment Strategy ("DIS") and / or Constituent Fund(s) for each contribution type. Please refer to point 2 below for the details of a valid investment mandate. 你須提交一個有效的投資授權，列明每一供款類別的預設投資策略及／或成分基金的投資分配百分比，請參閱下列第二點，以查閱有效之投資授權的詳情。
2. 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 每項投資分配百分比須為整數，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%。
3. 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 **wholly** invested in the DIS if: 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別將會全部根據預設投資策略進行投資，如：
   (I) you **do not** give a valid, clear or complete investment mandate including but not limited to amendments which are not properly signed; or 你沒有提供有效、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
   (II) the investment allocation percentage of any selected funds is not an integer; or 任何所選基金的投資分配百分比並非整數；或
   (III) the total investment allocation percentage of the selected funds is not 100%; or 所選基金的投資分配百分比總和不等於 100%；或
   (IV) the instruction of any selected funds is unclear or illegible; or 任何所選基金指示不清晰或無法辨認；或
   (V) no investment mandate is being provided below. 沒有於下列提供任何投資授權。
4. 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。預設投資策略適用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。
5. The below investment mandate will **not apply** to any transfer-in asset in the form of **unit transfer** from another account in the same Scheme (if any). 下列投資授權並不適用於由本計劃內的其他戶口以**單位轉移**形式轉入的資產 (如有)。
6. Transfer-in monies from another registered scheme, Minimum MPF benefits ("MMB") and / or accrued benefits other than MMB transferred from other ORSO scheme(s) (if any) will be invested in mandatory contributions and / or voluntary contributions respectively in the following manner: 由另一註冊計劃轉入之款項、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) 將分別根據下列強制性供款及／或自願性供款比例進行投資：

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	
		Mandatory Contributions 強制性供款	Voluntary Contributions 自願性供款
DIS	基金 1	%	%
GLSF	基金 2	%	%
GLGF	基金 3	%	%
GUAF	基金 4	%	%
CAPF	基金 5	%	%
GLEF	基金 6	%	%
GLBF	基金 7	%	%
ASBF	基金 8	%	%
APEF	基金 9	%	%
USEF	基金 10	%	%
EUEF	基金 11	%	%
HKEF	基金 12	%	%
GCEF	基金 13	%	%
CAF2	基金 14	%	%
A65F2	基金 15	%	%
	Total 總數	1 0 0 %	1 0 0 %

[6] De-risking mechanism will not apply if you choose these constituent funds as standalone investments (rather than as part of the DIS). 如你選擇此等成分基金作為獨立投資 (而非預設投資策略的一部分)，風險降低機制並不適用。

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積金易助理介面

範例二: 為成員登記強積金帳戶

iv.個人帳戶持有人申請表

所需資料:

A. 成員資料
B. 稅務居民身分自我證明
C. 投資授權
D. 個人資料收集聲明
E. 授權及聲明



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、處理及持有閣下的個人資料，用作處理閣下強積金計劃的登記和閣下強積金帳戶管理的用途。閣下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。若閣下已註冊積金易平台，即表示閣下已同意我們的收集個人資料聲明，其最新版本載於下文。若閣下尚未註冊，請參閱我們以下的收集個人資料聲明。閣下透過此表格提供個人資料，即表示閣下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、處理及持有閣下的個人資料。

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，本聲明旨在向閣下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、處理及持有閣下的個人資料、有關個人資料的用途和可能獲提供有關個人資料的對象，以及閣下可根據《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 . 閣下可於本公司的《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、保留及保護閣下個人資料的政策。

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。積金易公司透過「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、處理及持有與閣下有關的個人資料包括：

a. Information which you provide during enrolment to an MPF scheme; 閣下就參與強積金計劃提供的資料；
b. Information which you provide during registration for the eMPF Platform and, regardless of any such registration, when you transact with the eMPF Platform; 閣下就登記使用積金易平台，以及閣下使用積金易平台(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; 由閣下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; 閣下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閣下的查詢、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，將在獲得閣下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閣下的個人資料及其他資料(除非標記為「可選填」外)後，方能為閣下提供積金易平台的相關服務。如閣下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閣下的交易及/或要求，或為閣下提供相關服務。

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、處理及持有閣下的個人資料作下列用途：

a. to facilitate your access to, and the management of your MPF account; 協助閣下查閱及管理強積金帳戶；
b. 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、管理及執行閣下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閣下強積金計劃的核准受託人達成的協定，提供有關的服務；
c. 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，與閣下或閣下僱主的個人及其他資料進行比對；
d. 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；
e. to communicate with you, and to provide you with customer services; 與閣下溝通並為閣下提供客戶服務；
f. 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；

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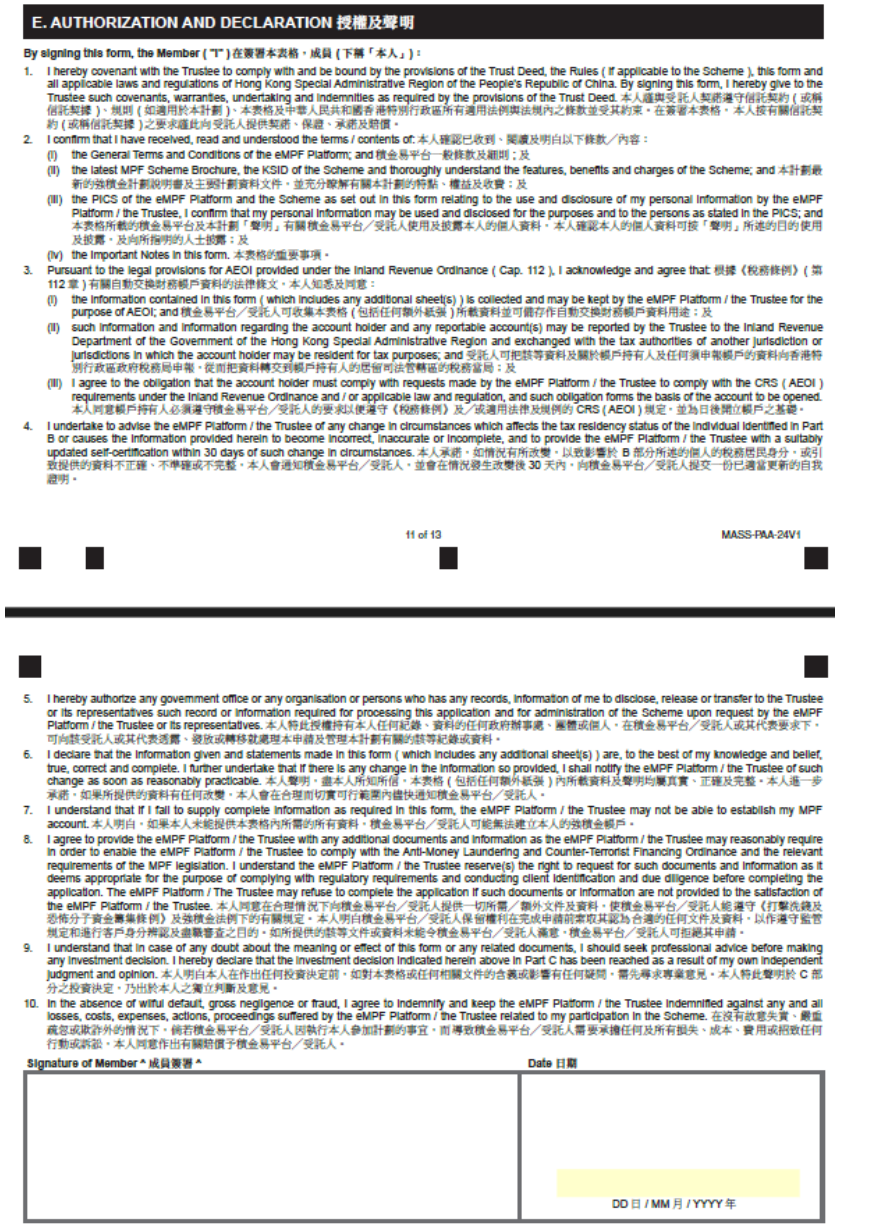
積金易助理介面

範例二: 為成員登記強積金帳戶

iv.個人帳戶持有人申請表

所需資料:

A. 成員資料
B. 稅務居民身分自我證明
C. 投資授權
D. 個人資料收集聲明
E. 授權及聲明



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. 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) 所載資料並可儲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可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。
4. 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。

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5. 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。
6. 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。
7. 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。
8. 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。
9. 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。
10. 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。

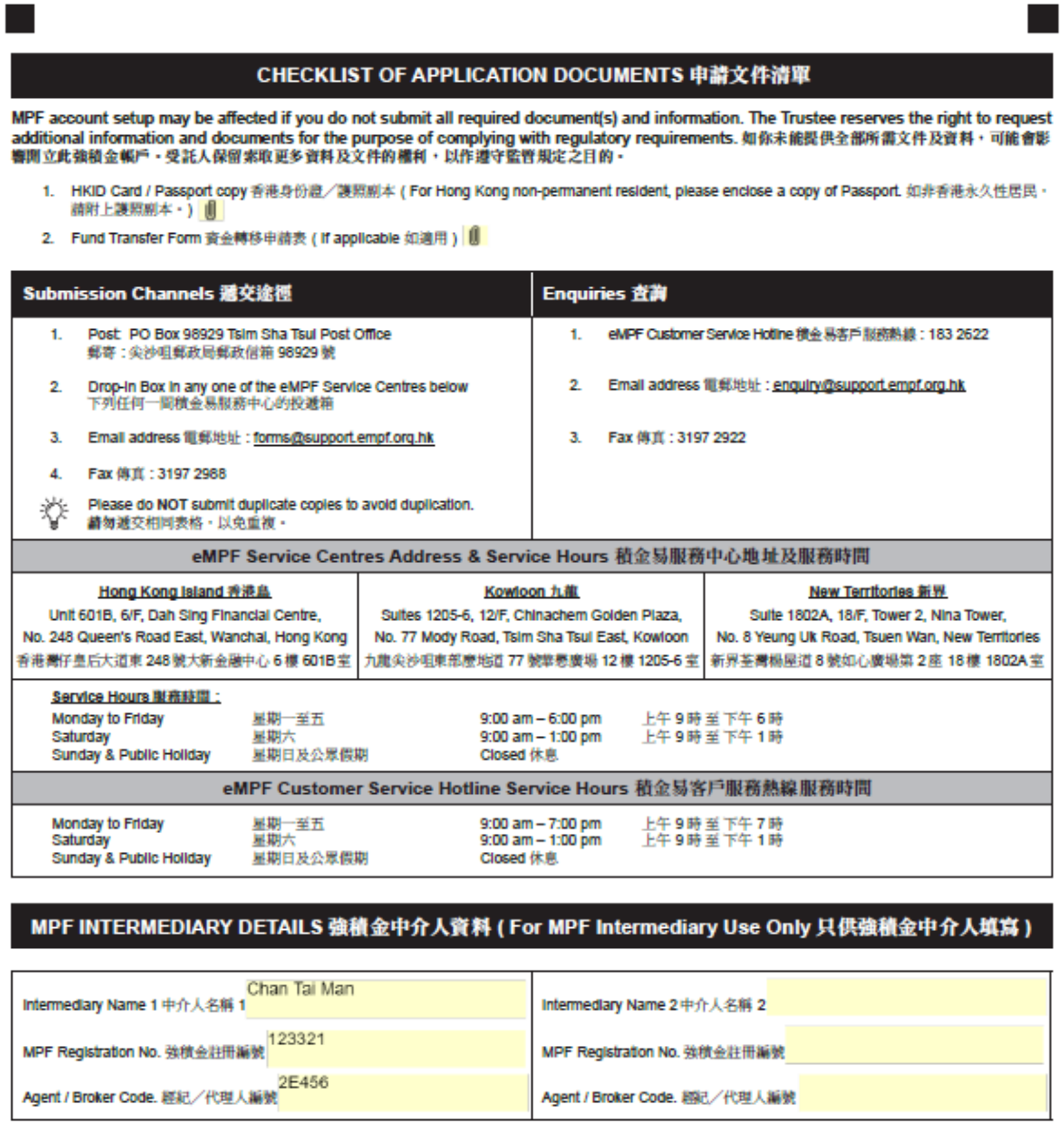
Signature of Member ^ 成員簽署 ^ **Date 日期**

DD 日 / MM 月 / YYYY 年

iv.個人帳戶持有人申請表

所需資料:

A. 成員資料
B. 稅務居民身分自我證明
C. 投資授權
D. 個人資料收集聲明
E. 授權及聲明



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. HKID Card / Passport copy 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. Fund Transfer Form 資金轉移申請表 (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 2968	
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)

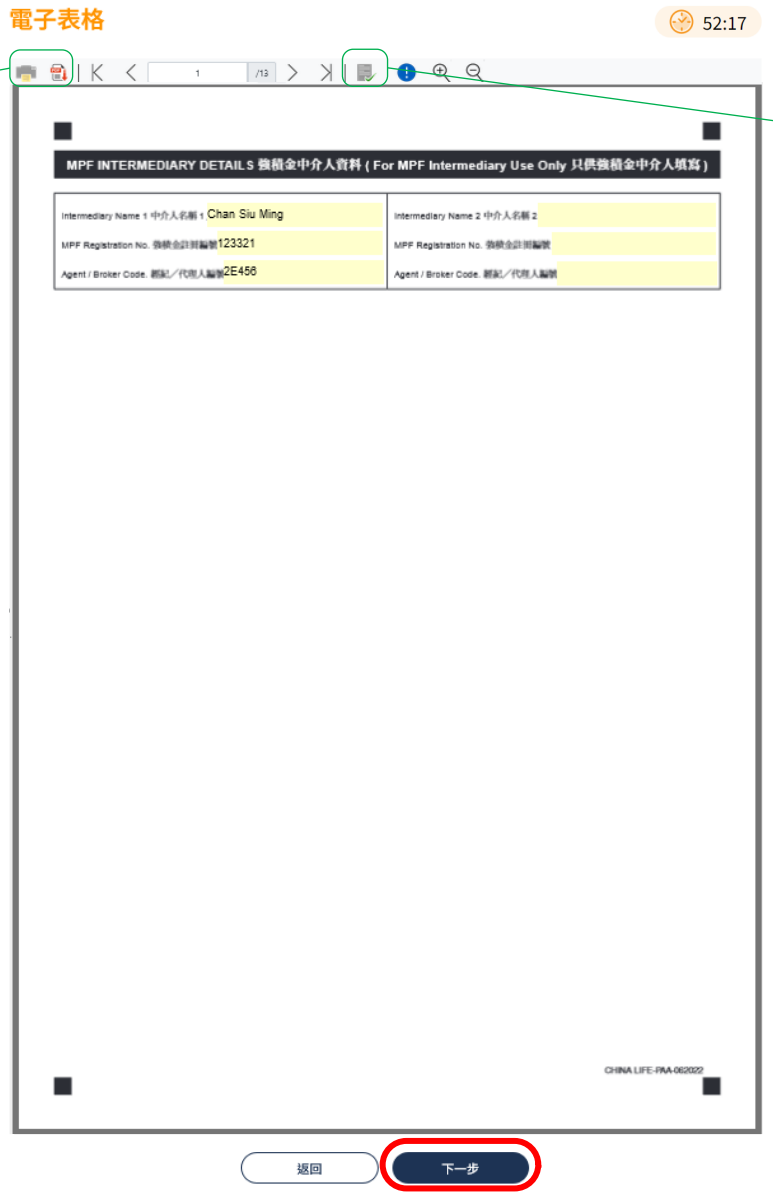
Intermediary Name 1 中介人名稱 1	Chan Tai Man	Intermediary Name 2 中介人名稱 2	
MPF Registration No. 強積金註冊編號	123321	MPF Registration No. 強積金註冊編號	
Agent / Broker Code. 經紀／代理人編號	2E456	Agent / Broker Code. 經紀／代理人編號	

積金易助理介面

範例二: 為成員登記強積金帳戶

小貼士：

輸入完成後，中介人可點擊**列印**或**匯出PDF**來儲存表格副本

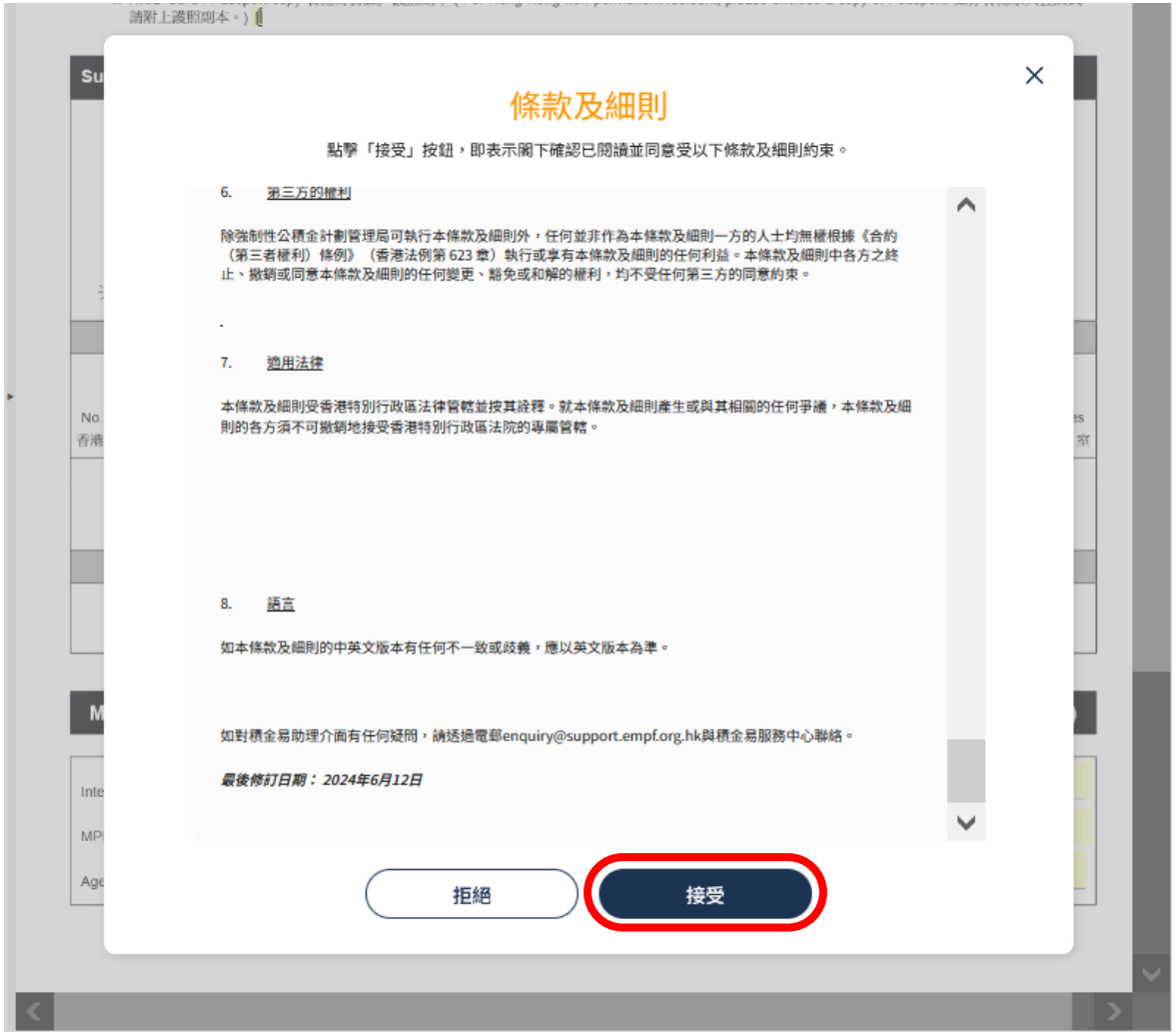


點擊**下一步**前，中介人可點擊**驗證**以查驗漏報卻又必需的資料

積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 | 選擇受託人和計劃名稱 | 選擇申請表 | **輸入申請人資料並提交** | 申請人核對及確認



細閱條款與細則並到達網頁底部後按**「接受」**

積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 | 選擇受託人和計劃名稱 | 選擇申請表 | **輸入申請人資料並提交** | 申請人核對及確認

成功遞交後，系統會顯示確認訊息

中介人亦同時會收到電郵／短訊通知



積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > 輸入申請人資料並提交 > **申請人核對及確認**

中介人提交申請後，成員將會收到電郵或短訊通知

中介人亦可提醒成員登入積金易處理相關申請

積金易平台 - 參考編號：
EAD1508602000035266
我們已收到您的強積金中介人 / 積金局代表 / 授權代理人 Chan Tai Man 為您提交的登記計劃指示。請下載／開啟積金易流動應用程式以完成註冊程序。
查詢 (852) 183 2622

From: empfinfo <no-reply@osc.empf.org.hk>

Subject: Confirmation - Successful Submission of Your MPF Request 確認 - 你的強積金指示遞交成功

網上提交參考編號： EAD1508602000035266

敬啓者，

我們已收到您的強積金中介人 / 積金局代表 / 授權代理人 Chan Tai Man 為您提交的登記計劃指示，請登入積金易平台查閱詳情及採所需行動（如適用）。

如有任何查詢，歡迎致電 (852) 183 2622 或電郵 enquiry@support.empf.org.hk 與我們聯絡。

積金易平台 謹啓

積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > 輸入申請人資料並提交 > **申請人核對及確認**

按「**待辦事項**」進入頁面，然後選擇「**登記計劃**」的事項



積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > 輸入申請人資料並提交 > **申請人核對及確認**

然後選擇**「登記計劃」**的事項

成員可在此查閱中介人資料，然後按**下一步**



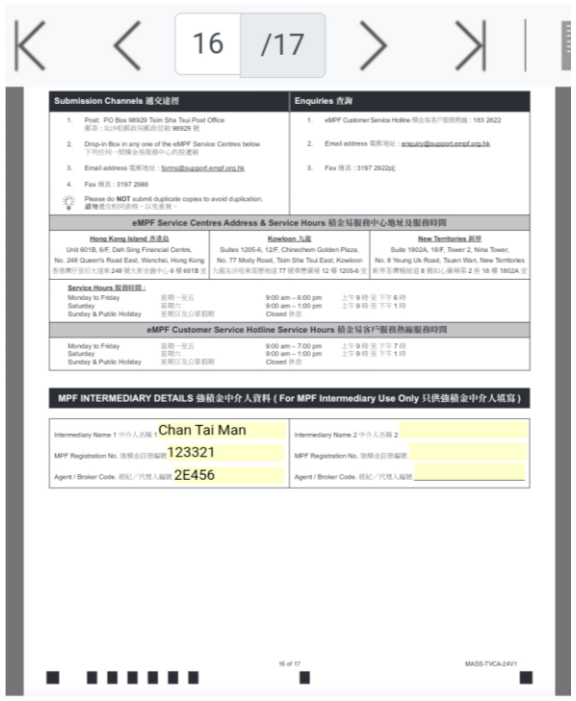
積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 → 選擇受託人和計劃名稱 → 選擇申請表 → 輸入申請人資料並提交 → **申請人核對及確認**

核對中介人預備的電子表格後，按**下一步**，然後按**同意**以提交申請

來自強積金註冊中介人／代表的申請正待你查閱





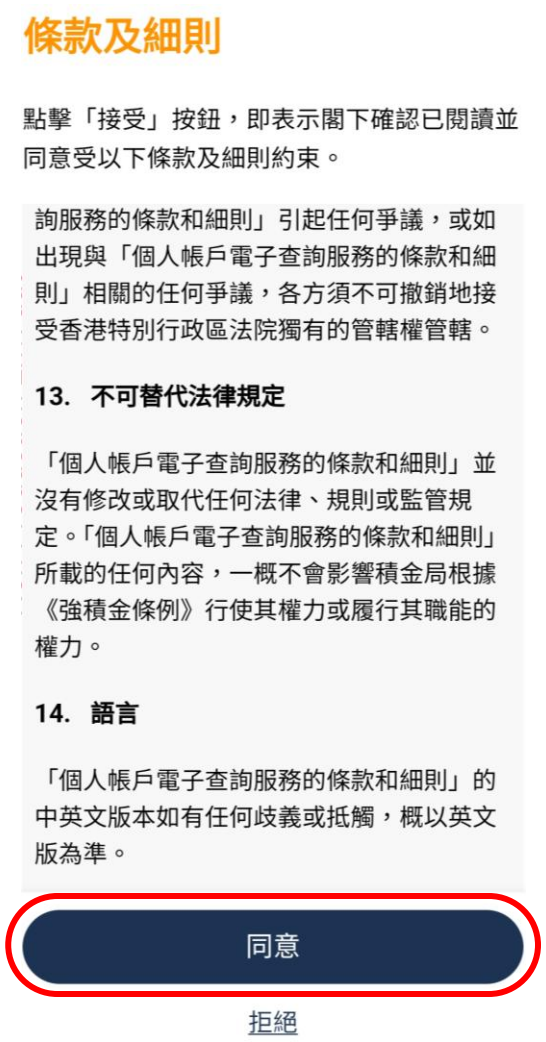
積金易助理介面

範例二: 為成員登記強積金帳戶

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > 輸入申請人資料並提交 > **申請人核對及確認**

細閱條款及細則，然後按**同意**

申請成功提交後，中介人會透過電郵／短訊收到平台相關通知





範例三: 為成員轉移強積金權益

範例三: 為成員轉移強積金權益

- 選擇申請人身分（**成員**）
- 點選相應的申請類別（**轉移強積金**），然後點擊「**下一步**」

小貼士:

- 中介人請留意申請時限。



積金易助理介面

範例三: 為成員轉移強積金權益

選擇申請人身分和申請類別 | **選擇申請表** | 輸入申請人資料並提交 | 申請人核對及確認

選擇相應申請表，包括：

i. 計劃成員整合個人帳戶申請表

ii. 計劃成員資金轉移申請表

iii.「僱員自選安排」 – 轉移選擇表格

iv.計劃成員可扣稅自願性供款轉移申請表



積金易助理介面

範例三: 為成員轉移強積金權益

選擇申請人身分和申請類別 | **選擇申請表** | 輸入申請人資料並提交 | 申請人核對及確認

選擇表格後，請細閱重要資訊，再按**確定**



積金易助理介面

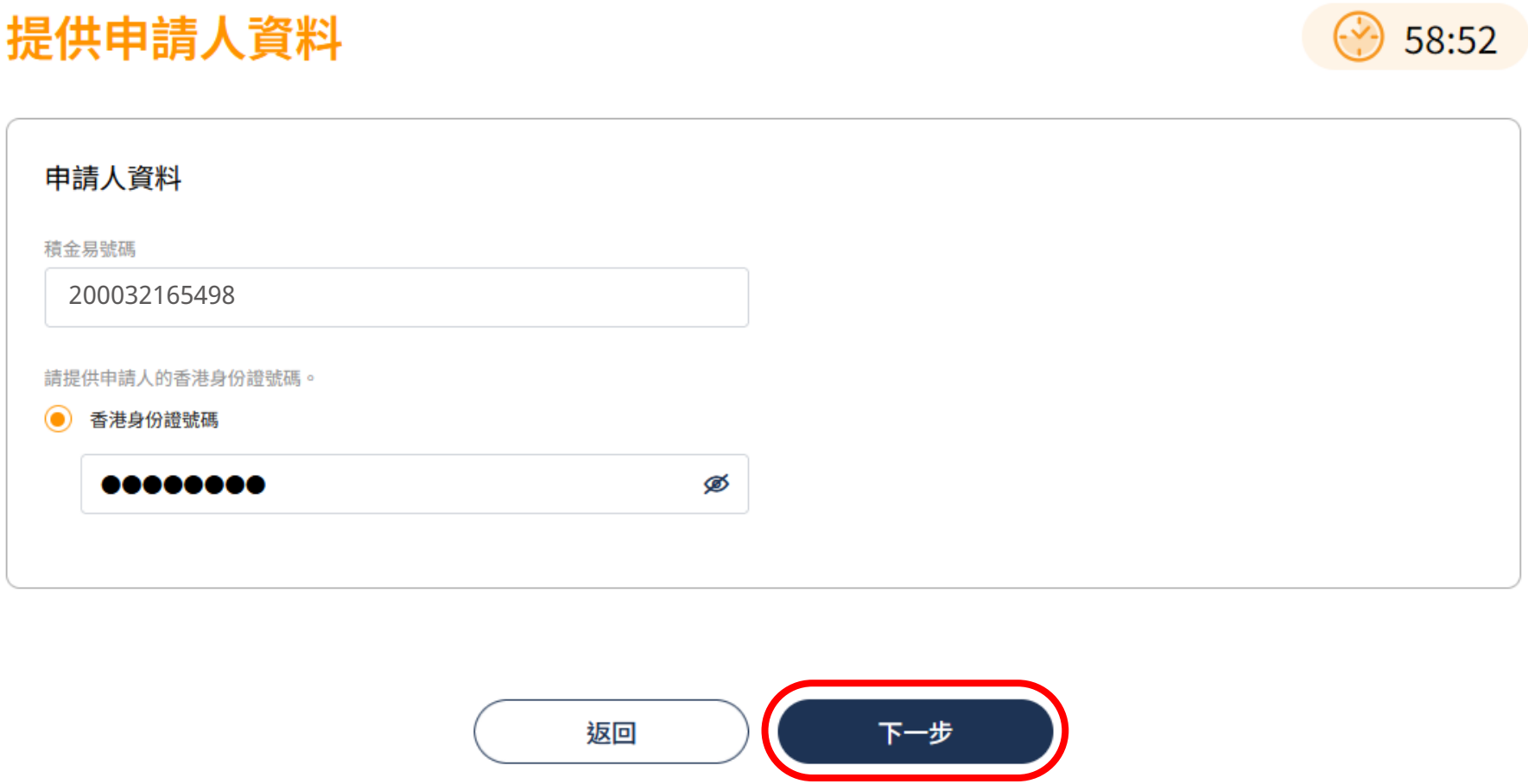
範例三: 為成員轉移強積金權益

選擇申請人身分和申請類別 > 選擇申請表 > **輸入申請人資料並提交** > 申請人核對及確認

請輸入申請人的

1. **積金易號碼** 及
2. **香港身份證號碼**

然後點擊**下一步**



積金易助理介面

範例三: 為成員轉移強積金權益

i. 計劃成員整合個人帳戶申請表

所需資料:

A. 計劃成員資料

B. 我選擇的計劃

C. 授權及聲明

D. 附錄A: 本人選擇整合的個人帳戶列表

E. 附錄 B: 積金易平台及已轉移至積金易平台的強積金計劃《個人資料收集聲明》列表



積金易

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)

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)

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。
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 ✓。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。

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

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

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

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

積金易助理介面

i. 計劃成員整合個人帳戶申請表

A. 計劃成員資料

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 Cheng

Given Name in English 英文名字 Wing Shan ("the Member")

Name in Chinese 中文姓名 (Surname 姓氏) 鄭 (Given Name 名字) 永珊 (「成員」)

(2) Identification 身分證明

✓ HKID Card 香港身份證

Document No. 證件號碼 A345****

積金易助理介面

範例三: 為成員轉移強積金權益

i. 計劃成員整合個人帳戶申請表

A. 計劃成員資料

(3) Contact Details 聯絡資料

(i) Mobile Phone No. 手提電話號碼 (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 #)

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)

(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

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

積金易助理介面

i. 計劃成員整合個人帳戶申請表

B. 我選擇的計劃

注意！

此下拉式選單只能選擇已上線至積金易平台的強積金計劃。



B. MY ELECTED SCHEME 我選擇的計劃

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)

強積金計劃Y ("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

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 3766535473

小貼士:

- 若申請人未獲悉成員帳戶號碼（例如相關帳戶未完成登記），中介人可留空此項。

積金易助理介面

i. 計劃成員整合個人帳戶申請表

C. 授權及聲明

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
	DD 日 / MM 月 / YYYY 年

積金易助理介面

i. 計劃成員整合個人帳戶申請表

附錄A: 本人選擇整合的個人帳戶列表

小貼士:

- 當相關強積金計劃上線至積金易平台後，成員的每個強積金帳戶均會獲得一組新的帳戶號碼
- 成員若提供了舊有的帳戶號碼，積金易平台亦能處理相關申請

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
受託人 A	強積金計劃 A	8745299034
受託人 B	強積金計劃 B	
	強積金計劃 C	
	強積金計劃 D	
	強積金計劃 E	
	強積金計劃 F	
受託人 C	強積金計劃 G	

範例三: 為成員轉移強積金權益

i. 計劃成員整合個人帳戶申請表

中介人資料

APPENDIX B: LIST OF "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE ONBOARDED MPF SCHEME
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 scheme. Please download and read the PICS of the eMPF Platform and the onboarded MPF scheme by 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」。閣下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		QR Code 二維碼
The eMPF Platform 積金易平台		
Personal Information Collection Statement of The Onboarded MPF Scheme 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**	**QR Code 二維碼**
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	

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 Chan Tai Man	Intermediary Name 2 中介人名稱 2
MPF Registration No. 強積金註冊編號 123321	MPF Registration No. 強積金註冊編號
Agent / Broker Code. 經紀／代理人編號 2E456	Agent / Broker Code. 經紀／代理人編號

積金易助理介面

範例三: 為成員轉移強積金權益

ii. 計劃成員資金轉移申請表

所需資料:

A. 計劃成員資料
B. 轉移資料
C. 轉移選項
D. 終止沒有結餘的強積金帳戶 (如適用)
E. 授權及聲明



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(M)

SCHEME MEMBER'S REQUEST FOR FUND TRANSFER FORM
[FORM MPF(S) – P(M)]
(For self-employed person, personal account holder or employee ceasing employment)
計劃成員資金轉移申請表 [第 MPF(S) – P(M) 號表格]
(適用於自僱人士、個人帳戶持有人或終止受僱的僱員)

P(M)

Sections 145, 146, 147, 148 and 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 145、146、147、148 及 149 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。
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。如有劃改，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。

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

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

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

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

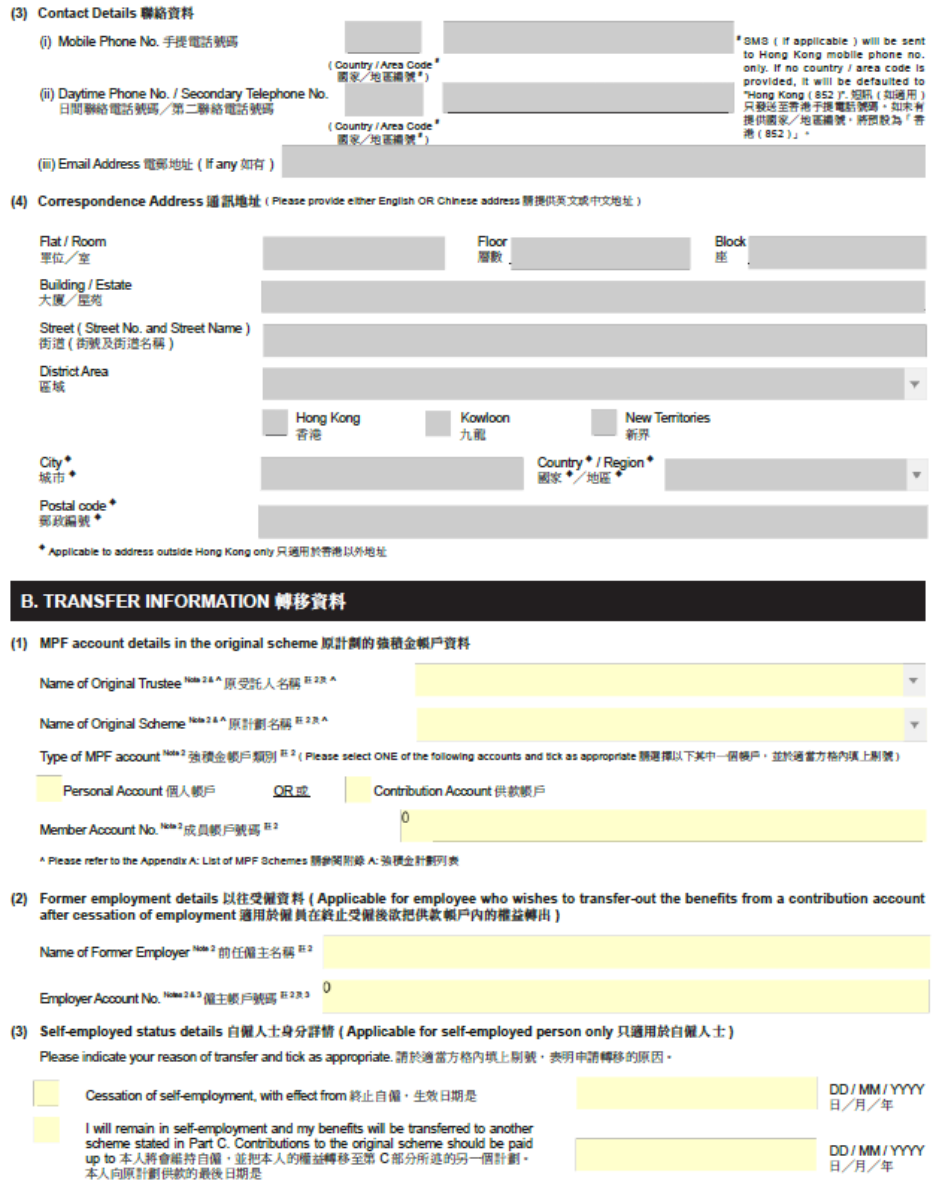
Document No. 證件號碼

範例三: 為成員轉移強積金權益

ii. 計劃成員資金轉移申請表

所需資料:

A. 計劃成員資料
B. 轉移資料
C. 轉移選項
D. 終止沒有結餘的強積金帳戶 (如適用)
E. 授權及聲明



(3) Contact Details 聯絡資料

(i) Mobile Phone No. 手提電話號碼 (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*)

* 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)

(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 | 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

B. TRANSFER INFORMATION 轉移資料

(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 Note 2 & ^

Name of Original Scheme Note 2 & ^ 原計劃名稱 Note 2 & ^

Type of MPF account Note 2 強積金帳戶類別 Note 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

Member Account No. Note 2 成員帳戶號碼 Note 2 0

^ Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃列表

(2) Former employment details 以往受僱資料 (Applicable for employee who wishes to transfer-out the benefits from a contribution account 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 Note 2

Employer Account No. Note 2 & 3 僱主帳戶號碼 Note 2 & 3 0

(3) Self-employed status details 自僱人士身分詳情 (Applicable for self-employed person only 只適用於自僱人士)

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 本人將會維持自僱，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

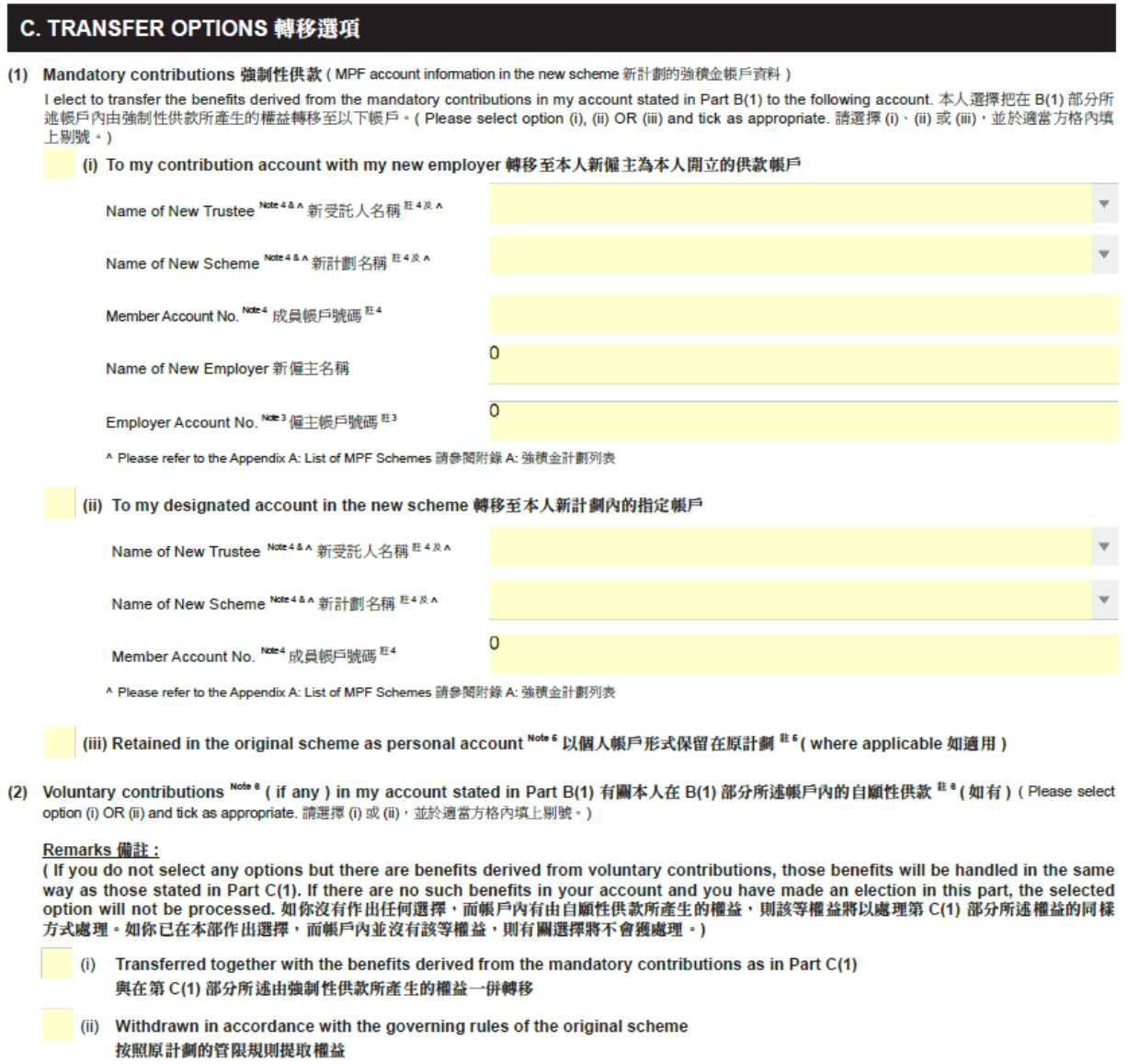
積金易助理介面

範例三: 為成員轉移強積金權益

ii. 計劃成員資金轉移申請表

所需資料:

A. 計劃成員資料
B. 轉移資料
C. 轉移選項
D. 終止沒有結餘的強積金帳戶 (如適用)
E. 授權及聲明



C. TRANSFER OPTIONS 轉移選項

(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 transfer the benefits derived from the mandatory contributions in my account stated in Part B(1) to the following account. 本人選擇把在 B(1) 部分所述帳戶內由強制性供款所產生的權益轉移至以下帳戶。(Please select option (i), (ii) OR (iii) and tick as appropriate. 請選擇 (i)、(ii) 或 (iii)，並於適當方格內填上剔號。)

☐ **(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 ^

Name of New Scheme Note 4 & ^ 新計劃名稱 註 4 及 ^

Member Account No. Note 4 成員帳戶號碼 註 4

Name of New Employer 新僱主名稱 0

Employer Account No. Note 3 僱主帳戶號碼 註 3 0

^ Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃列表

☐ **(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 ^

Name of New Scheme Note 4 & ^ 新計劃名稱 註 4 及 ^

Member Account No. Note 4 成員帳戶號碼 註 4 0

^ 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 8 (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 8 (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。)

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**

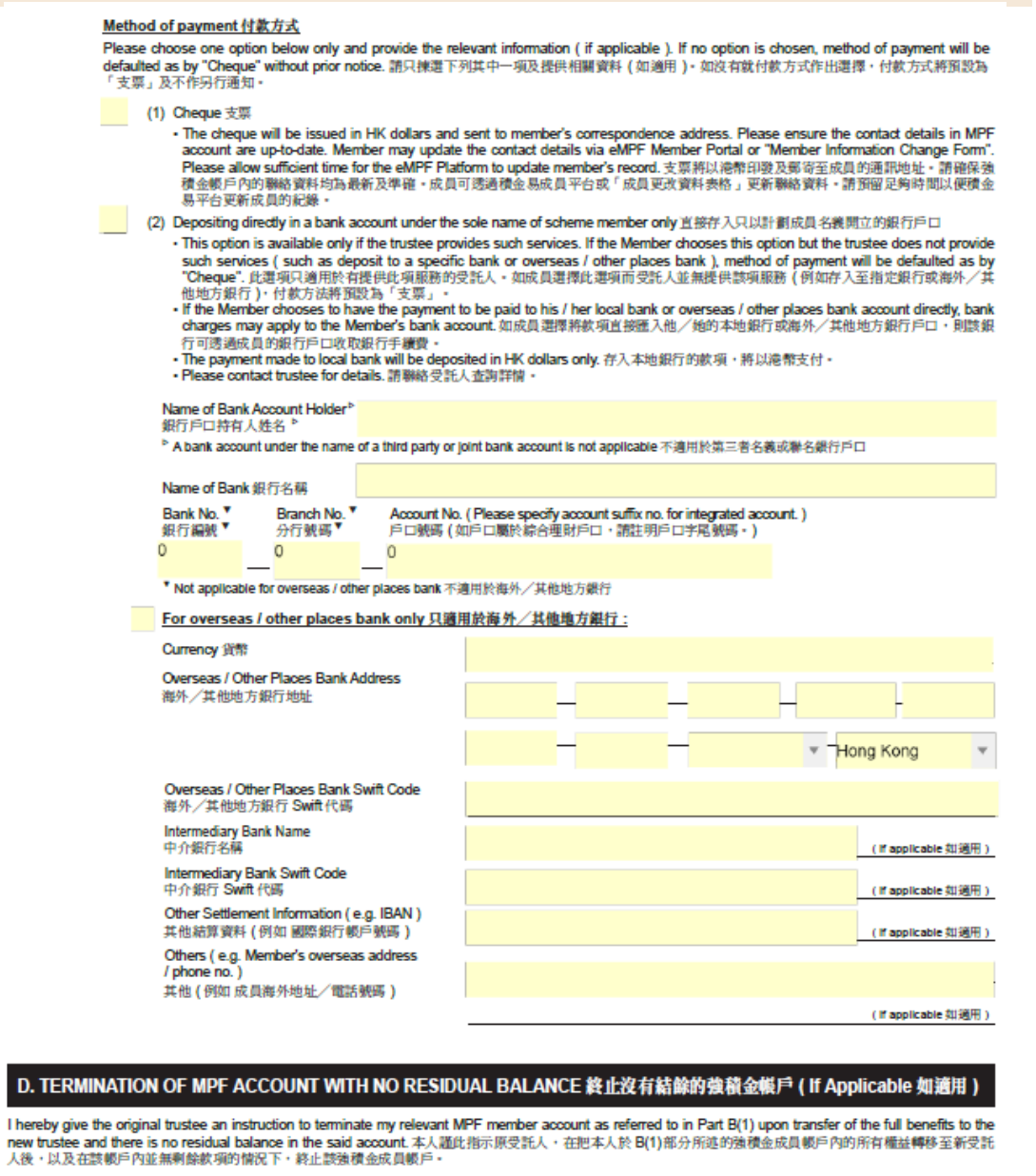
積金易助理介面

範例三: 為成員轉移強積金權益

ii. 計劃成員資金轉移申請表

所需資料:

A. 計劃成員資料
B. 轉移資料
C. 轉移選項
D. 終止沒有結餘的強積金帳戶 (如適用)
E. 授權及聲明



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 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 ▷
▷ 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

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。)
0 — 0 — 0

▼ 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

Hong Kong

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。

積金易助理介面

範例三: 為成員轉移強積金權益

ii. 計劃成員資金轉移申請表

所需資料:

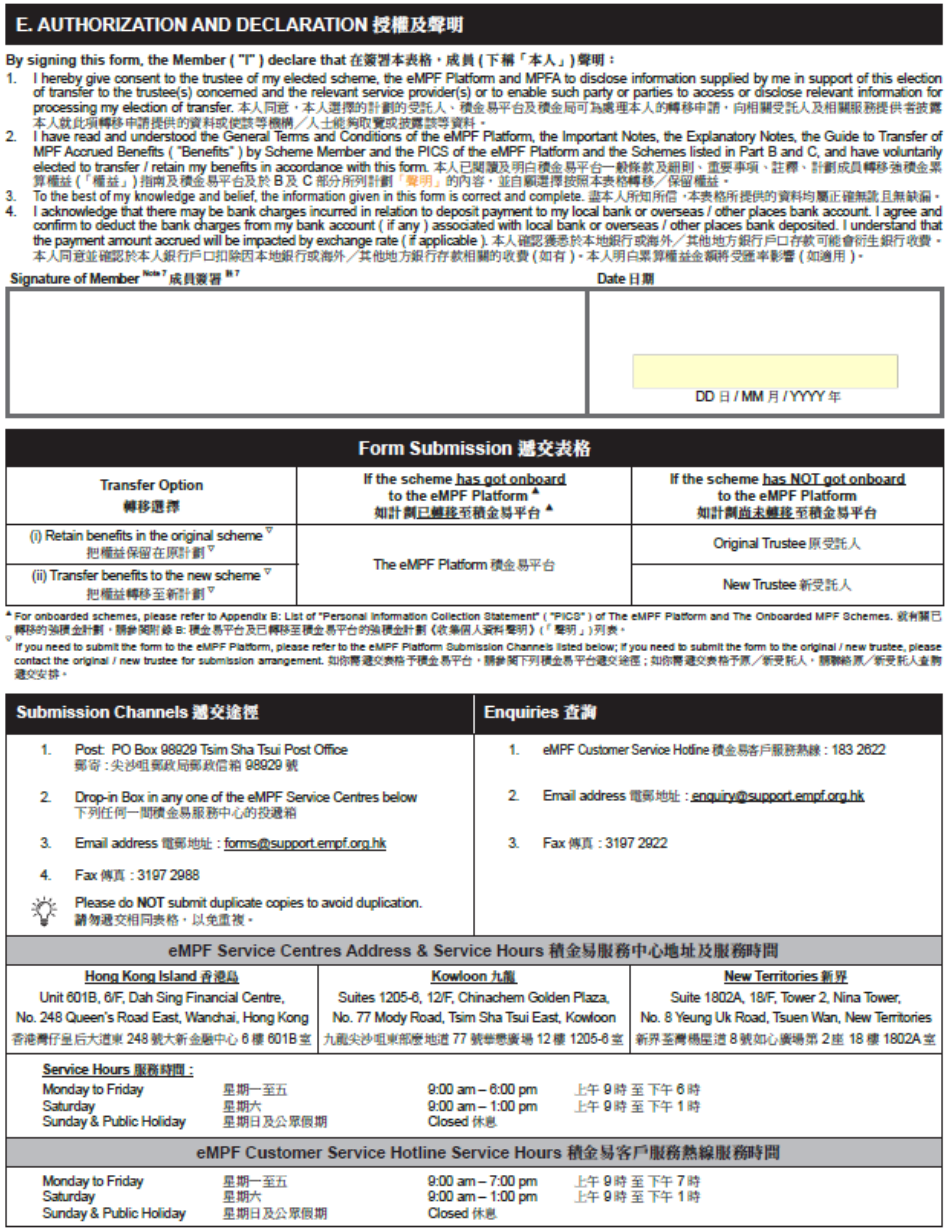
A. 計劃成員資料

B. 轉移資料

C. 轉移選項

D. 終止沒有結餘的強積金帳戶 (如適用)

E. 授權及聲明



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. 本人已閱覽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 [附註 7] | Date 日期

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；如你需遞交表格予原／新受託人，請聯絡原／新受託人安排遞交安排。

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 九龍尖沙咀東部歷地道 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	

積金易助理介面

範例三: 為成員轉移強積金權益

ii. 計劃成員資金轉移申請表

所需資料:

A. 計劃成員資料

B. 轉移資料

C. 轉移選項

D. 終止沒有結餘的強積金帳戶 (如適用)

E. 授權及聲明

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	Chan Tai Man	Intermediary Name 2 中介人名稱 2	
MPF Registration No. 強積金註冊編號	123321	MPF Registration No. 強積金註冊編號	
Agent / Broker Code. 經紀／代理人編號	2E456	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。

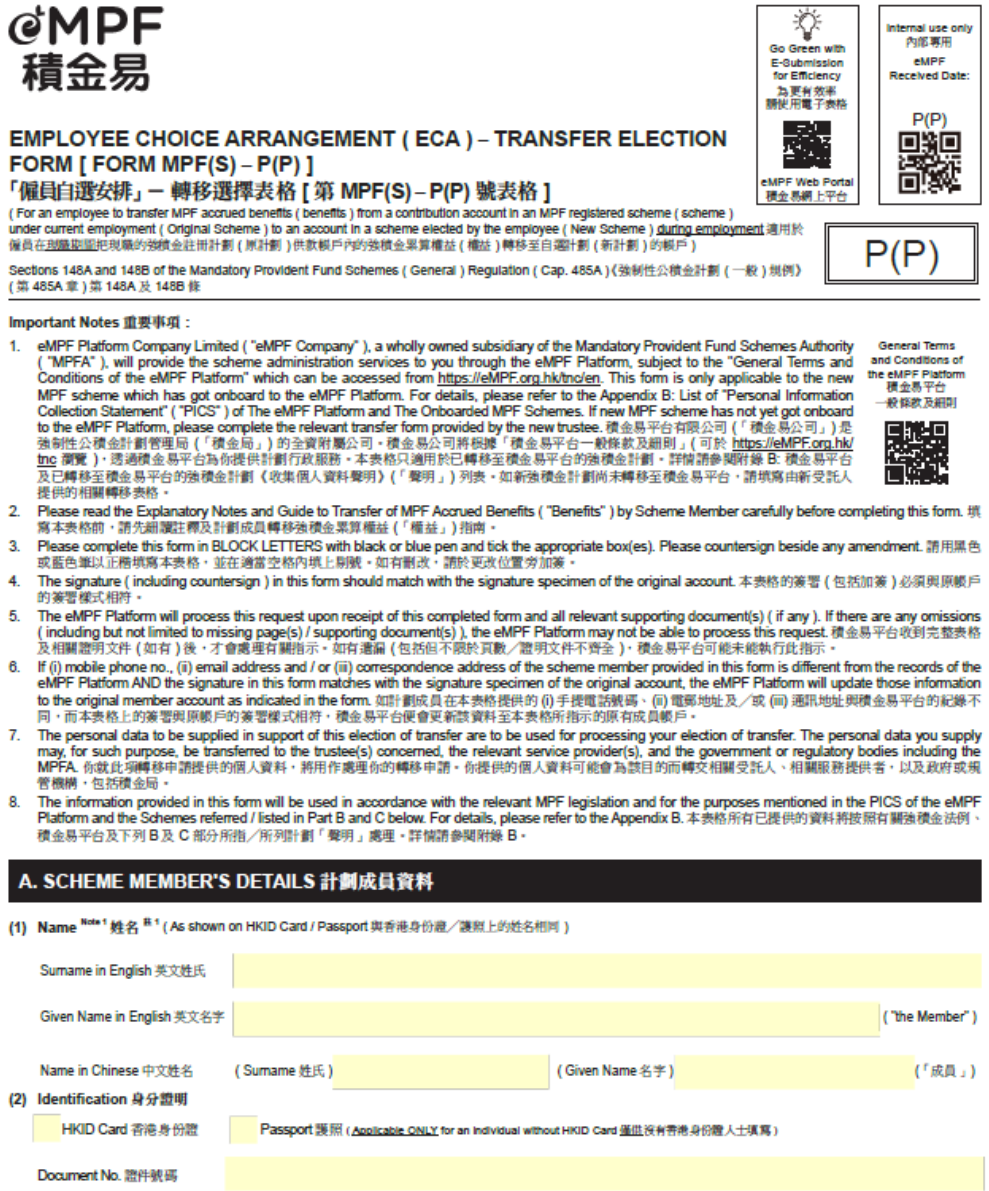
   If you are in doubt, please contact the eMPF Platform, the original trustee or your former employer. 如有疑問，請聯絡積金易平台、原受託人或前任僱主。
3. The employer account no. is the number assigned by the eMPF Platform / the trustee to the employer concerned. The number can be found in the statements issued by the eMPF Platform / 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) 就新地強積金僱主管辦計劃，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管辦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。

iii.「僱員自選安排」 – 轉移選擇表格

所需資料:

A. 計劃成員資料
B. 原計劃的供款帳戶資料
C. 轉移權益
D. 授權及聲明



積金易

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

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]

(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職的強積金註冊計劃 (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

P(P)

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。
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 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。

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

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

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

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

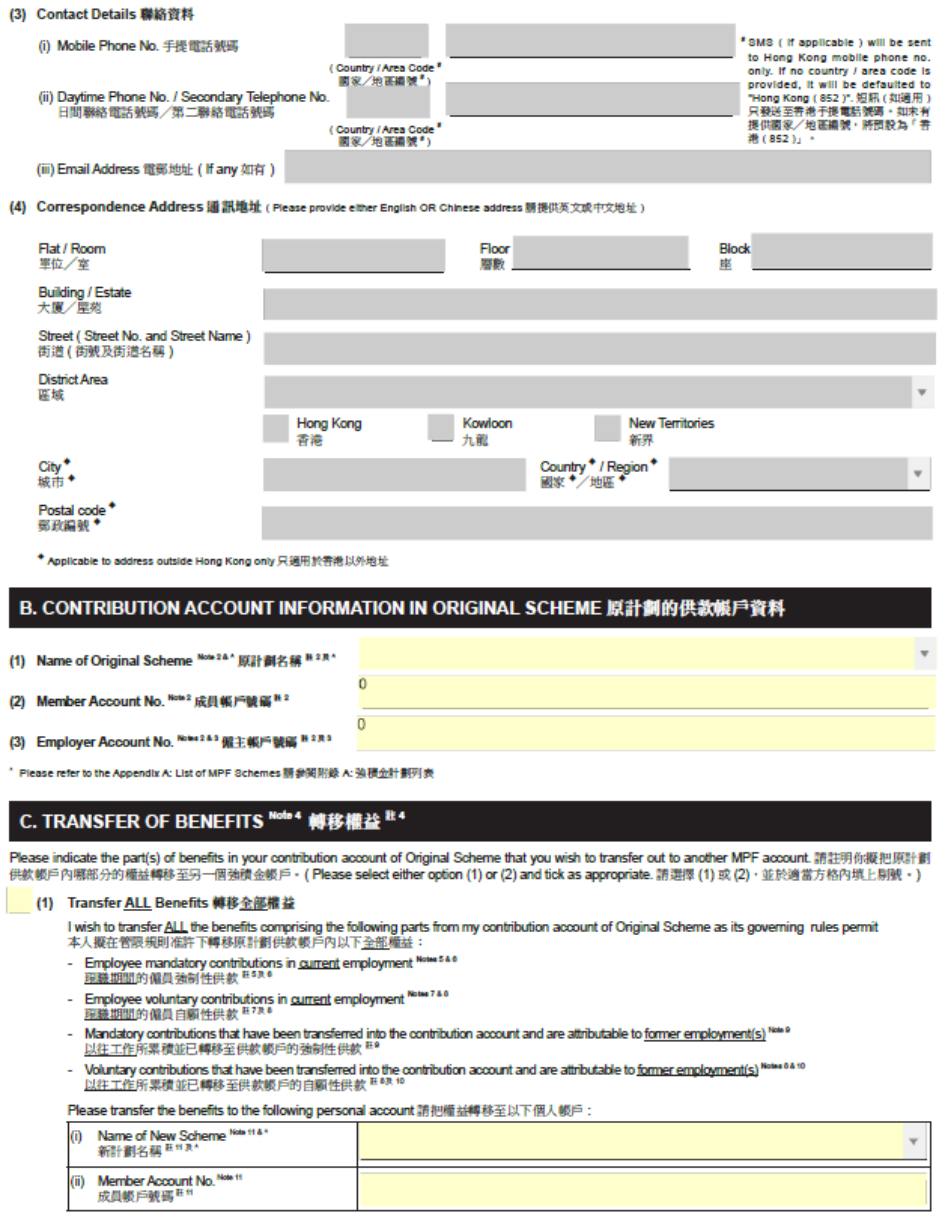
積金易助理介面

範例三: 為成員轉移強積金權益

iii.「僱員自選安排」 – 轉移選擇表格

所需資料:

A. 計劃成員資料
B. 原計劃的供款帳戶資料
C. 轉移權益
D. 授權及聲明



(3) Contact Details 聯絡資料

(i) Mobile Phone No. 手提電話號碼 (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 *)

* 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)

(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 | 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

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 *

(2) Member Account No. Note 2 成員帳戶號碼 註 2

(3) Employer Account No. Notes 2 & 3 僱主帳戶號碼 註 2 及 3

* Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃列表

C. TRANSFER OF BENEFITS Note 4 轉移權益 註 4

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

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 8 & 10 以往工作所累積並已轉移至供款帳戶的自願性供款 註 8 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 *	
(ii) Member Account No. Note 11 成員帳戶號碼 註 11	

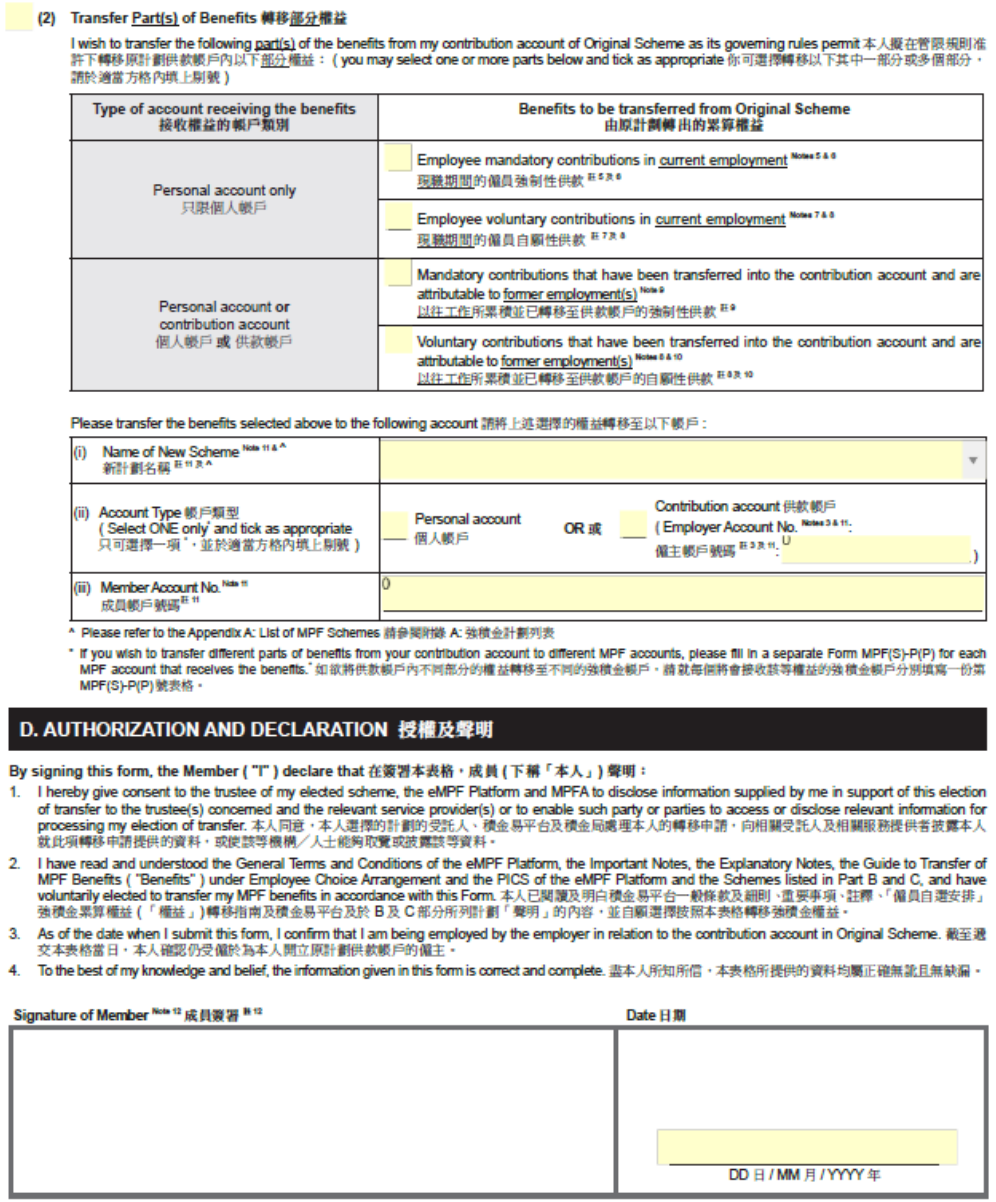
積金易助理介面

範例三: 為成員轉移強積金權益

iii.「僱員自選安排」 – 轉移選擇表格

所需資料:

A. 計劃成員資料
B. 原計劃的供款帳戶資料
C. 轉移權益
D. 授權及聲明



(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
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：

(i) Name of New Scheme 新計劃名稱 ^	
(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	

^ 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第 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 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. 本人已閱覽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

DD 日 / MM 月 / YYYY 年

積金易助理介面

範例三: 為成員轉移強積金權益

iii.「僱員自選安排」 – 轉移選擇表格

所需資料:

A. 計劃成員資料
B. 原計劃的供款帳戶資料
C. 轉移權益
D. 授權及聲明

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	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: Chan Tai Man	Intermediary Name 2 中介人名稱 2:
MPF Registration No. 強積金註冊編號: 123321	MPF Registration No. 強積金註冊編號:
Agent / Broker Code. 經紀／代理人編號: 2E456	Agent / Broker Code. 經紀／代理人編號:

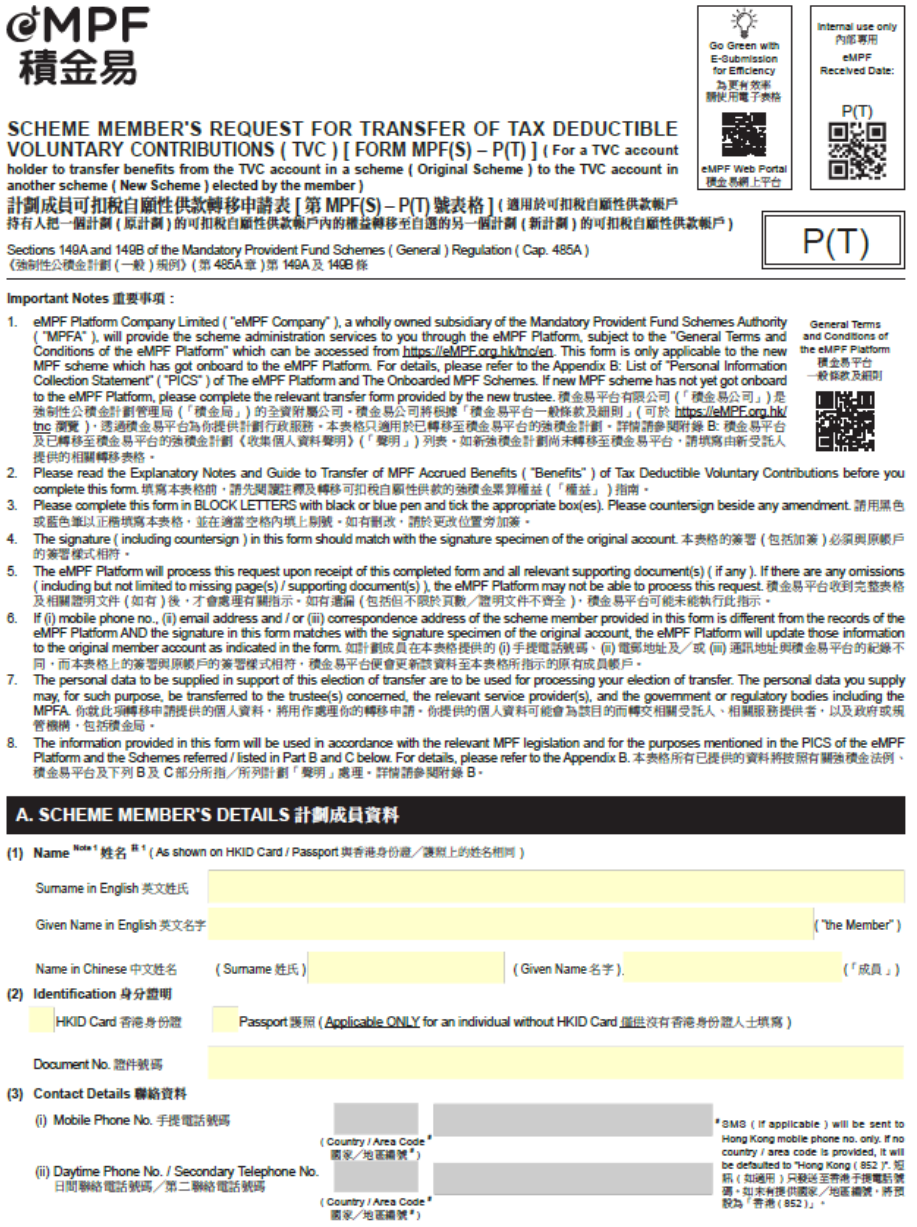
積金易助理介面

範例三: 為成員轉移強積金權益

iv.計劃成員可扣稅自願性供款轉移申請表

所需資料:

A. 計劃成員資料
B. 可扣稅自願性供款帳戶所屬原計劃的資料
C. 可扣稅自願性供款帳戶所屬新計劃的資料
D. 授權及聲明



eMPF 積金易

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

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)

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

P(T)

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。
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 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。

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

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

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

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

(3) Contact Details 聯絡資料

(i) Mobile Phone No. 手提電話號碼 (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 *)

* 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)」。

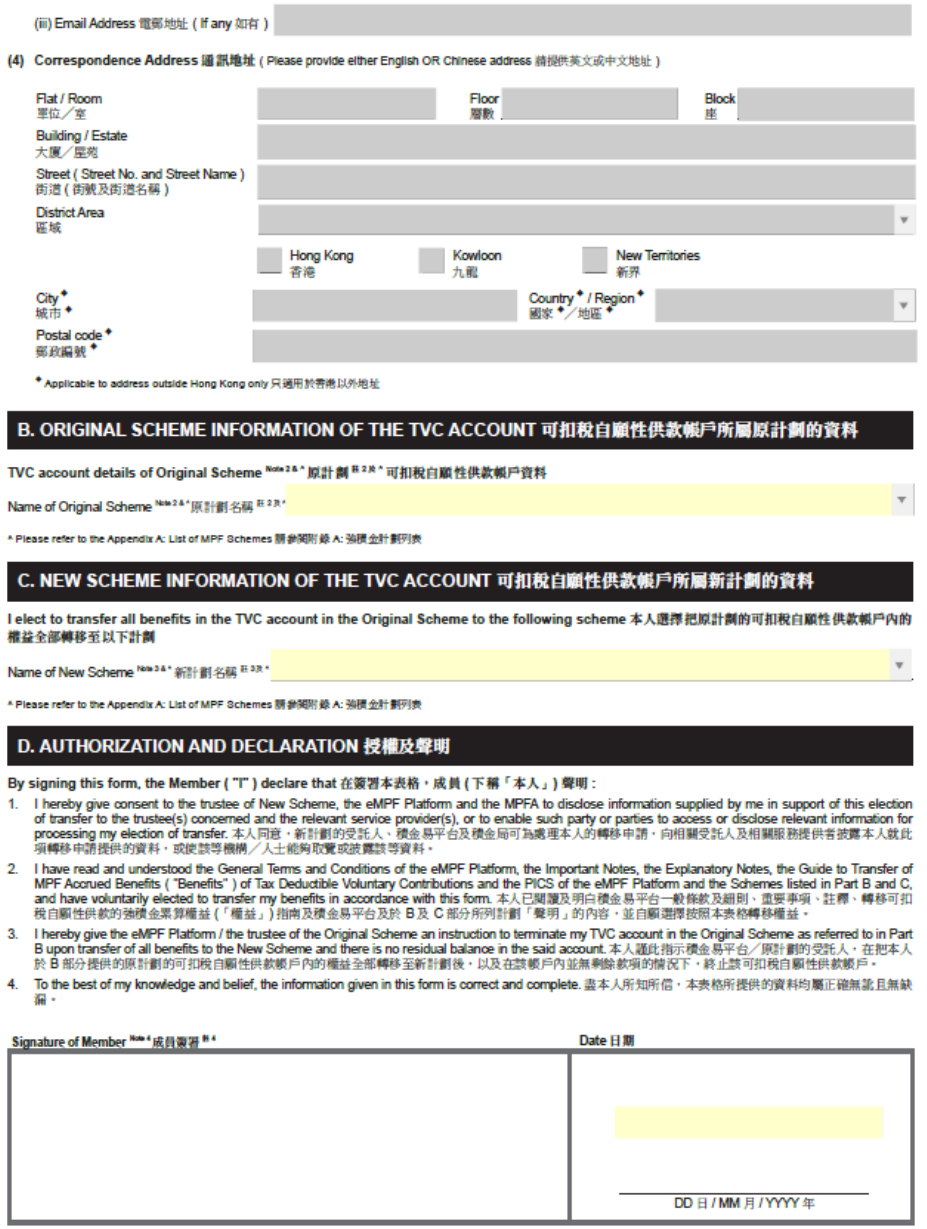
積金易助理介面

範例三: 為成員轉移強積金權益

iv.計劃成員可扣稅自願性供款轉移申請表

所需資料:

A. 計劃成員資料
B. 可扣稅自願性供款帳戶所屬原計劃的資料
C. 可扣稅自願性供款帳戶所屬新計劃的資料
D. 授權及聲明



(iii) Email Address 電郵地址 (If any 如有)

(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 | 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

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 ^

^ Please refer to the Appendix A: List of MPF Schemes 請參閱附錄 A: 強積金計劃列表

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 ^

^ 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

DD 日 / MM 月 / YYYY 年

積金易助理介面

範例三: 為成員轉移強積金權益

iv.計劃成員可扣稅自願性供款轉移申請表

所需資料:

A. 計劃成員資料
B. 可扣稅自願性供款帳戶所屬原計劃的資料
C. 可扣稅自願性供款帳戶所屬新計劃的資料
D. 授權及聲明

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	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)

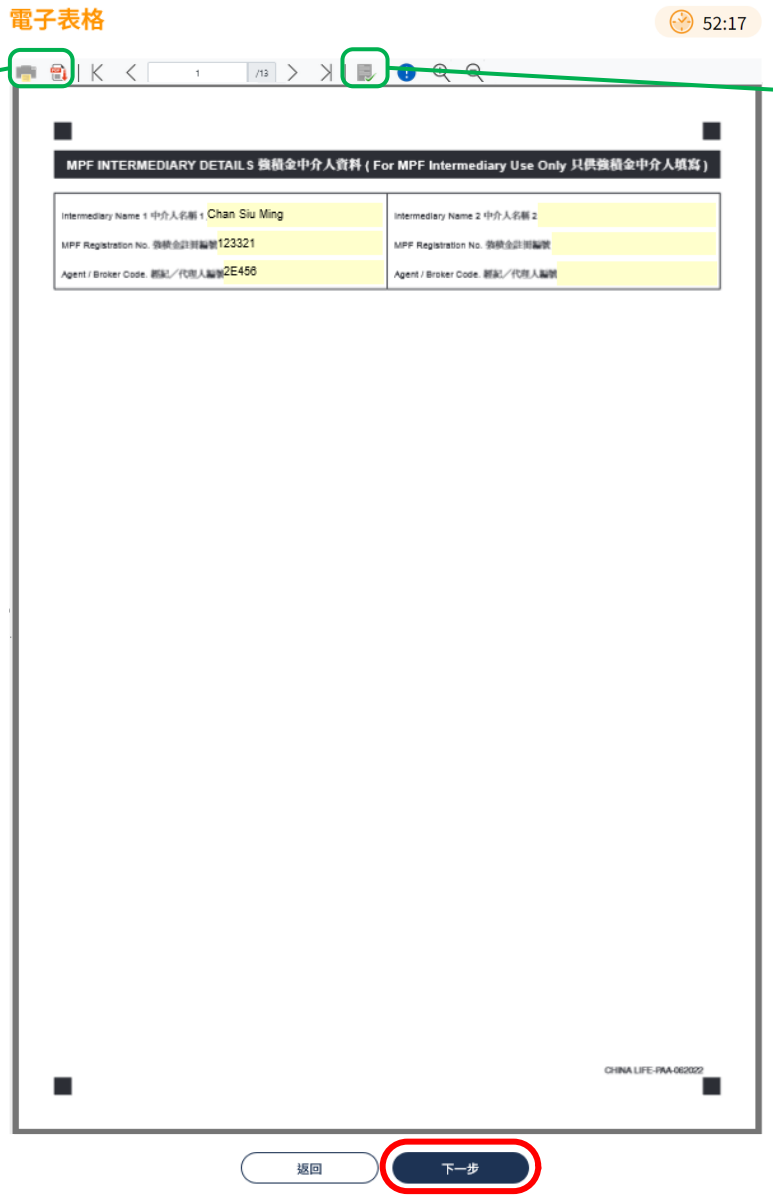
Intermediary Name 1 中介人名稱 1	Chan Tai Man	Intermediary Name 2 中介人名稱 2	
MPF Registration No. 強積金註冊編號	123321	MPF Registration No. 強積金註冊編號	
Agent / Broker Code. 經紀／代理人編號	2E456	Agent / Broker Code. 經紀／代理人編號	

積金易助理介面

範例三: 為成員轉移強積金權益

小貼士：

輸入完成後，中介人可點擊**列印**或**匯出PDF**來儲存表格副本



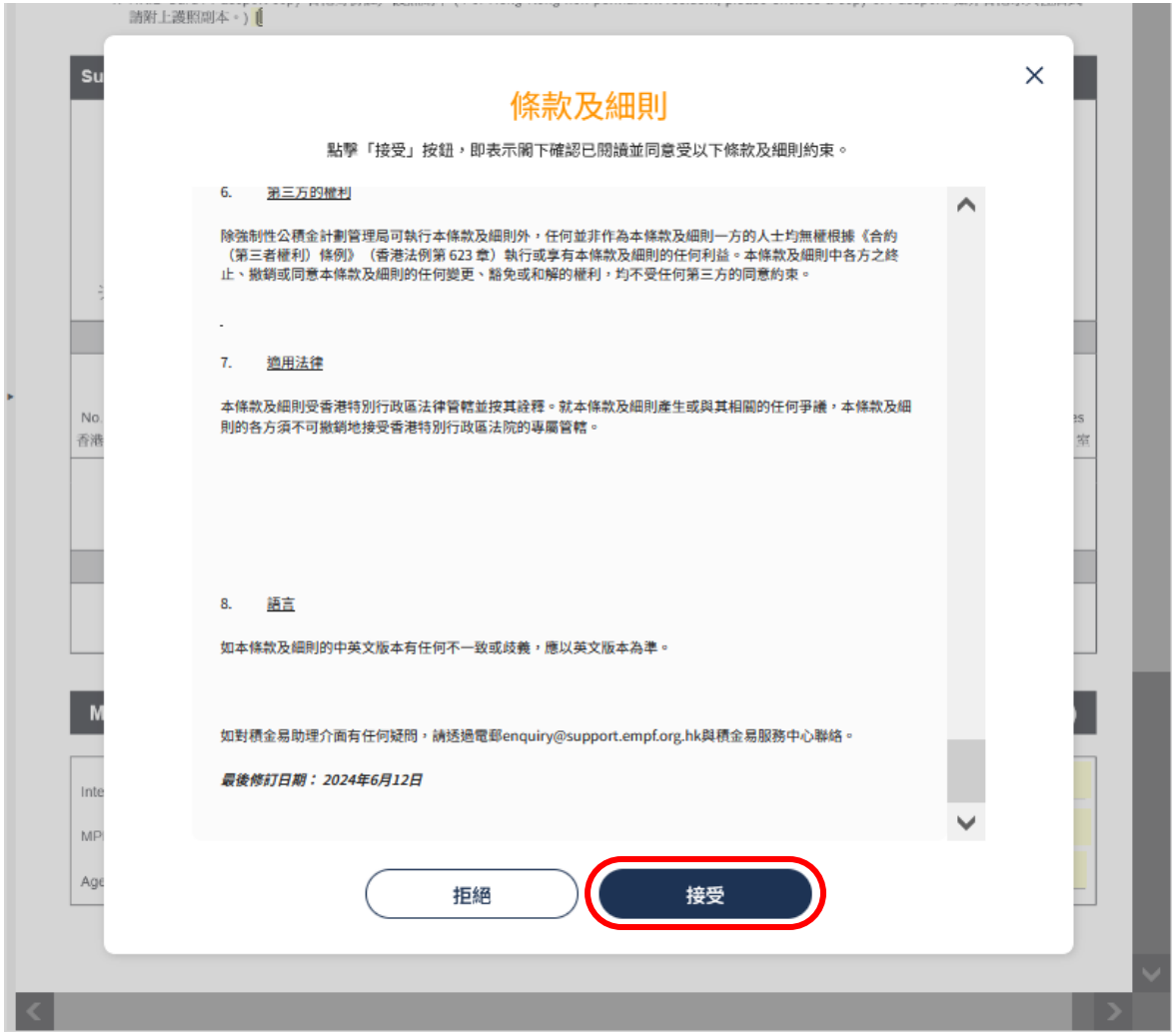
點擊**下一步**前，中介人可點擊**驗證**以查驗漏報卻又必需的資料

積金易助理介面

範例三: 為成員轉移強積金權益

選擇申請人身分和申請類別 > 選擇申請表 > **輸入申請人資料並提交** > 申請人核對及確認

細閱條款與細則並到達
網頁底部後按「**接受**」



積金易助理介面

範例三: 為成員轉移強積金權益

選擇申請人身分和申請類別 > 選擇申請表 > **輸入申請人資料並提交** > 申請人核對及確認

成功遞交後，系統會顯示確認訊息

中介人亦同時會收到電郵／短訊通知



積金易助理介面

範例三: 為成員轉移強積金權益

選擇申請人身分和申請類別 > 選擇申請表 > 輸入申請人資料並提交 > **申請人核對及確認**

按「**待辦事項**」進入頁面，然後選擇「**轉移**」的事項



積金易助理介面

範例三: 為成員轉移強積金權益

選擇申請人身分和申請類別 > 選擇申請表 > 輸入申請人資料並提交 > **申請人核對及確認**

成員須檢視，再確認及提交申請資料以完成整個強積金指示

成員提交申請後，平台將透過中介人已驗證的通訊方式向其發送通知



選擇申請人身分和申請類別 > 選擇申請表 > 輸入申請人資料並提交 > 申請人核對及確認

範例四: 為成員申索強積金權益

- 選擇申請人身分（**成員**）
- 點選相應的申請類別（**申索強積金權益**），然後點擊「**下一步**」

小貼士:

- 中介人請留意申請時限。



積金易助理介面

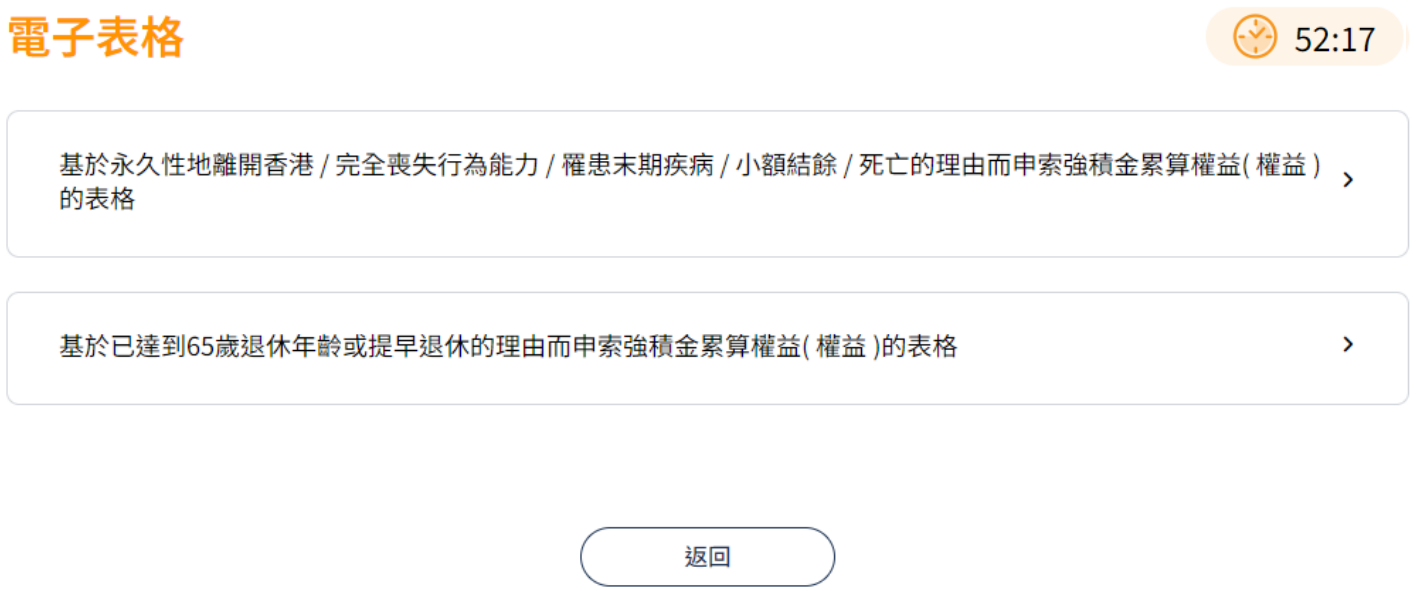
範例四: 為成員申索強積金權益

選擇申請人身分和申請類別 | **選擇申請表** | 輸入申請人資料並提交 | 申請人核對及確認

選擇相應申請表，包括：

i. **基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益 (權益)的表格**

ii. **基於已達到65歲退休年齡或提早退休的理由而申索強積金累算權益(權益) 的表格**



積金易助理介面

範例四: 為成員申索強積金權益

選擇申請人身分和申請類別 | **選擇申請表** | 輸入申請人資料並提交 | 申請人核對及確認

選擇表格後，請細閱重要資訊，再按**確定**



積金易助理介面

範例四: 為成員申索強積金權益

選擇申請人身分和申請類別 > 選擇申請表 > **輸入申請人資料並提交** > 申請人核對及確認

請輸入申請人的

1. **積金易號碼** 及
2. **香港身份證號碼**

然後點擊**下一步**



積金易助理介面

範例四: 為成員申索強積金權益

i. 基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益(權益)的表格

所需資料:

A. 申索人資料／計劃成員資料

B. 申索資料

1. 帳戶資料
2. 申索權益的理由及所需文件
3. 付款方式

C. 授權及聲明



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: WO

CLAIM FORM FOR PAYMENT OF MPF ACCRUED BENEFITS (BENEFITS) ON GROUNDS OF PERMANENT DEPARTURE FROM HONG KONG / TOTAL INCAPACITY / TERMINAL ILLNESS / SMALL BALANCE / DEATH [FORM MPF(S) – W(O)]
基於永久性地離開香港／完全喪失行為能力／罹患末期疾病／小額結餘／死亡的理由而申索強積金累算權益 (權益) 的表格 [第 MPF(S) – W(O) 號表格]

W(O)

Mandatory Provident Fund Schemes Ordinance (Cap. 485)《強制性公積金計劃條例》(第 485 章)
Sections 161, 163, 164, 164A and 165 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 161、163、164、164A 及 165 條

Important Notes 重要事項 :

1. Please read the following notes before completing this form. 請於填寫本表格前參閱以下注意事項。
   (I) 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 MPF scheme(s) which has / have got onboard to the eMPF Platform. For details, please refer to the Appendix A: List of "Personal Information Collection Statement" ("PICS") of The eMPF Platform and The Onboarded MPF Schemes. 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 A: 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。
   (II) This form is applicable only if you have previously given your signature specimen to the eMPF Platform / the trustee(s). If not, please submit your request via eMPF Member Portal or visit eMPF Service Centre to provide your signature specimen for verification. 本表格只適用於如閣下已經提供簽署樣式予積金易平台／受託人。如閣下尚未提供有關紀錄，請透過積金易成員平台遞交指示或前往積金易服務中心以提供閣下的簽署樣式以作核對用途。
   (III) The "Scheme(s)" refers to the MPF scheme(s) which is / are listed in Part B(1) of this form. For details, please refer to the Appendix A.「計劃」指於本表格 B(1) 部分所列的強積金計劃。詳情請參閱附錄 A。
   (IV) The "Trustee(s)" refers to the trustee(s) which is / are associated with the Scheme(s) listed in Part B(1) of this form. For details, please refer to the Appendix A.「受託人」指於本表格 B(1) 部分所列的計劃其相關受託人。詳情請參閱附錄 A。
2. This form is to be completed by any person who wishes to claim for payment of benefits from the Scheme(s) on the grounds of permanent departure from Hong Kong, total incapacity, terminal illness, small balance or death. For a claim for payment of benefits on the grounds of attaining the retirement age of 65 or early retirement, please use Form MPF(S) – W(R). 本表格僅供擬基於永久性地離開香港、完全喪失行為能力、罹患末期疾病、小額結餘或死亡的理由提出申索權益，要求從計劃提取權益的人士填寫。若基於已達到 65 歲退休年齡或提早退休的理由申索權益，請填寫第 MPF(S) – W(R) 號表格。
3. This form is not applicable for withdrawal of special voluntary contributions. If necessary, please complete "Special Voluntary Contributions Withdrawal / Scheme Termination Form". 本表格不適用於提取特別自願性供款。如需要，請填寫「特別自願性供款提取／終止計劃表格」。
4. 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。
5. 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。
6. The signature (including countersign) in this form should match with the signature specimen of the eMPF Platform / the trustee(s) (please refer to point 1(II) of the Important Notes). 本表格的簽署 (包括加簽) 必須與積金易平台／受託人的簽署樣式相符 (請參閱重要事項第 1(II) 點)。
7. Please read the Explanatory Notes and "Guide to Claim for Payment of MPF Accrued Benefits ("Benefits") on Grounds of Permanent Departure from Hong Kong / Total Incapacity / Terminal Illness / Small Balance / Death" carefully before completing this form. 填寫本表格前，請先參閱註釋及《永久性地離開香港／完全喪失行為能力／罹患末期疾病／小額結餘／死亡的理由而申索強積金累算權益 (「權益」) 指南》。
8. The personal data to be supplied in support of this claim for payment of benefits are to be used for processing your claim. The personal data you supply may, for such purpose, be transferred to the relevant service provider(s), the trustee(s) and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority ("MPFA"). 就此項申索權益申請提供的個人資料，將用作處理你的申索。你提供的個人資料可能會為該目的而轉交相關服務提供者、受託人及政府或規管機構，包括強制性公積金計劃管理局 (「積金局」)。
9. If (I) mobile phone no., (II) email address and / or (III) correspondence address of the scheme member provided on this form is different from the records of the eMPF Platform AND the signature in this form matches the signature specimen previously given to the eMPF Platform / the trustee(s), the eMPF Platform will update those information to the concerned member account(s). 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你之前給予積金易平台／受託人的簽署樣式相符，積金易平台便會更新該資料至相關成員帳戶。
10. 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 Scheme(s) referred / listed in Part B(1) below. For details, please refer to the Appendix A. 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(1) 部分所指／所列計劃「聲明」處理。詳情請參閱附錄 A。

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

積金易助理介面

範例四: 為成員申索強積金權益

i. 基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益(權益)的表格

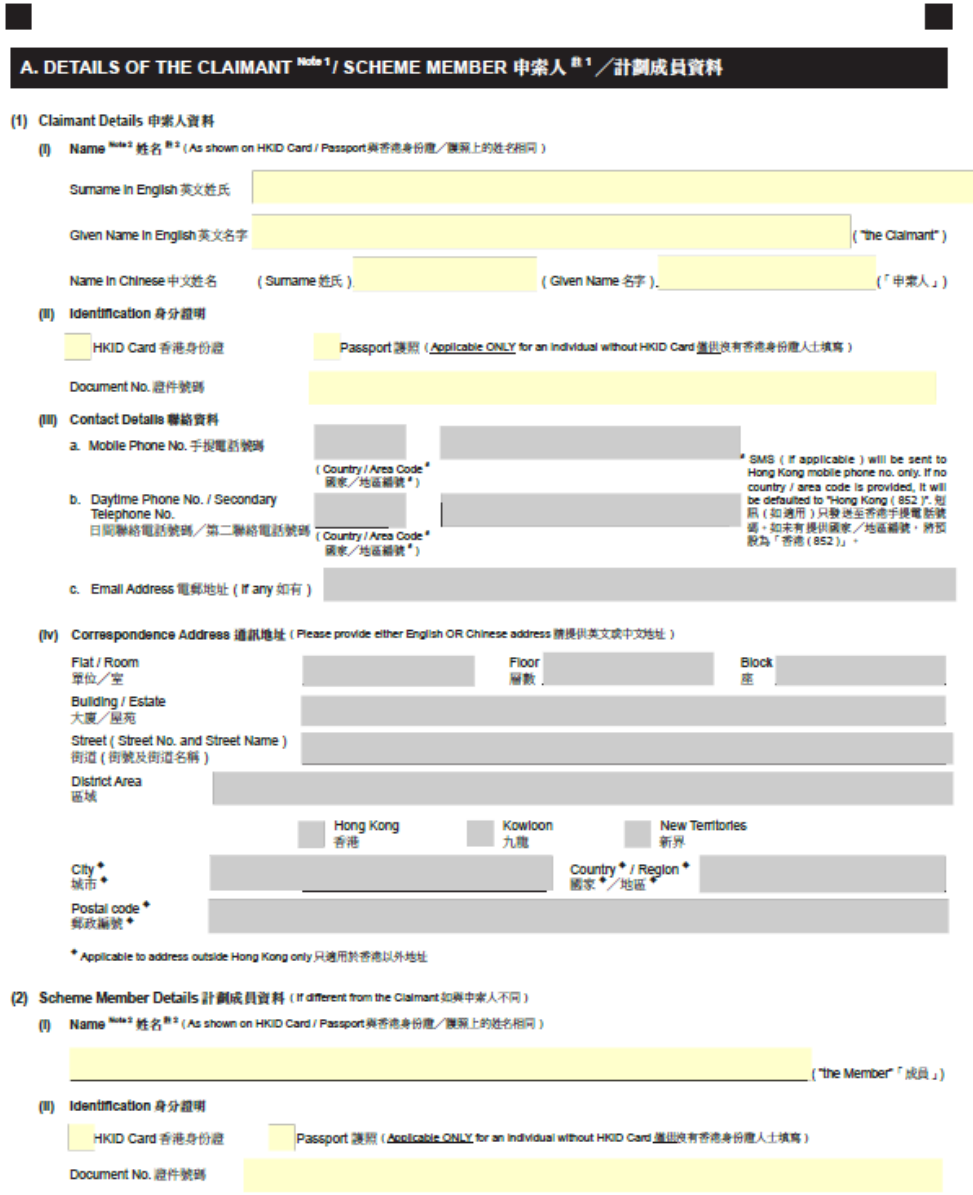
所需資料:

A. 申索人資料／計劃成員資料

B. 申索資料

1. 帳戶資料
2. 申索權益的理由及所需文件
3. 付款方式

C. 授權及聲明



A. DETAILS OF THE CLAIMANT Note 1 / SCHEME MEMBER 申索人 註 1 ／計劃成員資料

(I) Claimant Details 申索人資料

(i) Name Note 2 姓名 註 2 (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 ("the Claimant")

Name in Chinese 中文姓名 (Surname 姓氏) (Given Name 名字) (「申索人」)

(ii) 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

(iii) Contact Details 聯絡資料

a. Mobile Phone No. 手提電話號碼 (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)」。

b. 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 ✦)

c. Email Address 電郵地址 (if any 如有)

(iv) 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 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

(2) Scheme Member Details 計劃成員資料 (If different from the Claimant 如與申索人不同)

(i) Name Note 2 姓名 註 2 (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同)

("the Member" 「成員」)

(ii) 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

積金易助理介面

範例四: 為成員申索強積金權益

i. 基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益(權益)的表格

所需資料:

A. 申索人資料／計劃成員資料

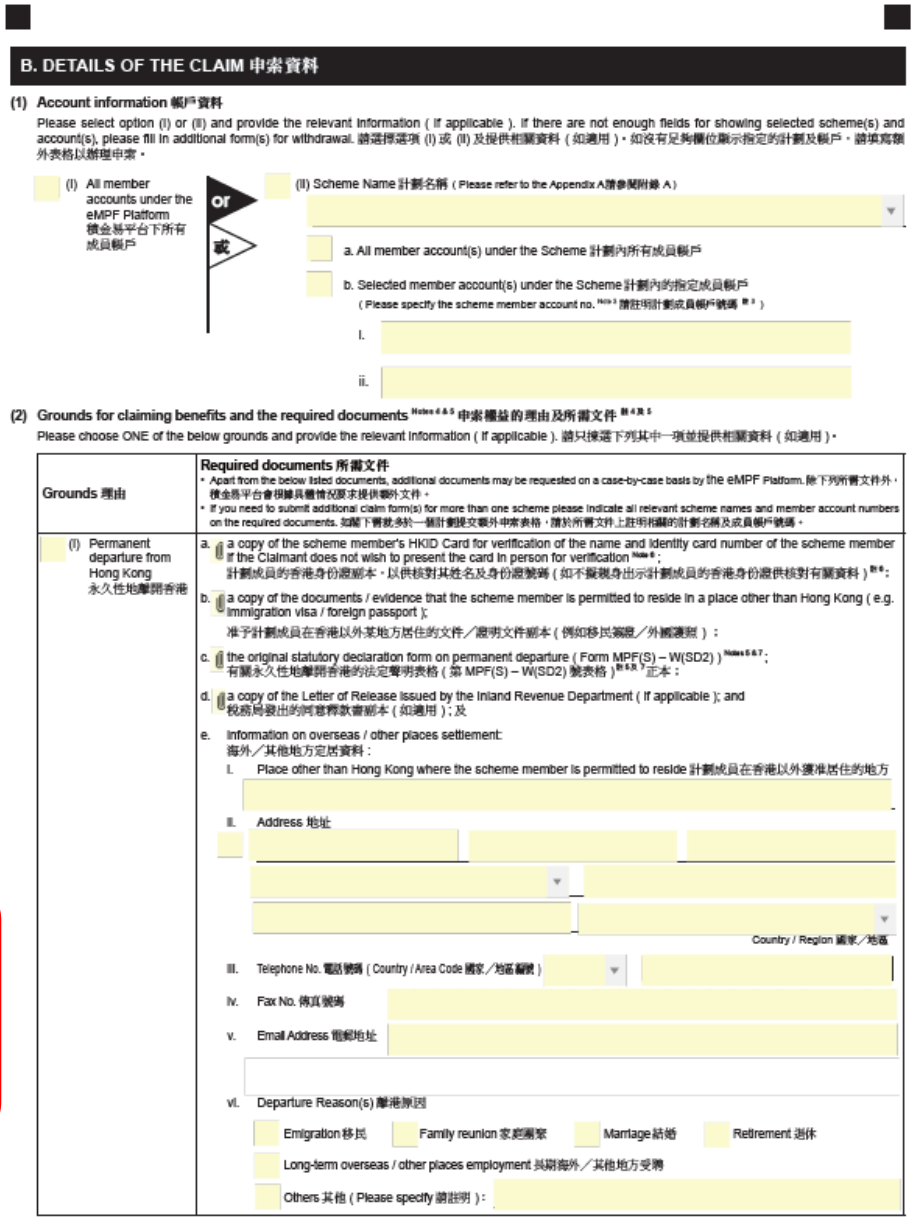
B. 申索資料

1. 帳戶資料
2. 申索權益的理由及**所需文件**
3. 付款方式

C. 授權及聲明

注意！

若所選擇的申索理由需要文件，此步驟必須上傳。
中介人應在填寫此表格前向客戶索取有關申請的所需文件。



B. DETAILS OF THE CLAIM 申索資料

(1) Account information 帳戶資料

Please select option (I) or (II) and provide the relevant information (if applicable). If there are not enough fields for showing selected scheme(s) and account(s), please fill in additional form(s) for withdrawal. 請選擇選項 (I) 或 (II) 及提供相關資料 (如適用)。如沒有足夠欄位顯示指定的計劃及帳戶，請填寫額外表格以辦理申索。

(I) All member accounts under the eMPF Platform 積金易平台下所有成員帳戶

or 或

(II) Scheme Name 計劃名稱 (Please refer to the Appendix A 請參閱附錄 A)

a. All member account(s) under the Scheme 計劃內所有成員帳戶

b. Selected member account(s) under the Scheme 計劃內的指定成員帳戶
(Please specify the scheme member account no. 請註明計劃成員帳戶號碼)

i.

ii.

(2) Grounds for claiming benefits and the required documents 申索權益的理由及所需文件

Please choose ONE of the below grounds and provide the relevant information (if applicable). 請只揀選下列其中一項並提供相關資料 (如適用)。

Grounds 理由	Required documents 所需文件
(I) Permanent departure from Hong Kong 永久性地離開香港	• Apart from the below listed documents, additional documents may be requested on a case-by-case basis by the eMPF Platform. 除下列所需文件外，積金易平台會視乎個別情況要求提供額外文件。 • If you need to submit additional claim form(s) for more than one scheme please indicate all relevant scheme names and member account numbers on the required documents. 如閣下需就多於一個計劃提交額外申索表格，請於所需文件上註明相關的計劃名稱及成員帳戶號碼。 a. a copy of the scheme member's HKID Card for verification of the name and identity card number of the scheme member if the Claimant does not wish to present the card in person for verification; 計劃成員的香港身份證副本，以供核對其姓名及身份證號碼 (如不擬親身出示計劃成員的香港身份證供核對有關資料); b. a copy of the documents / evidence that the scheme member is permitted to reside in a place other than Hong Kong (e.g. immigration visa / foreign passport); 准予計劃成員在香港以外某地方居住的文件／證明文件副本 (例如移民簽證／外國護照)； c. the original statutory declaration form on permanent departure (Form MPF(S) – W(SD2)); 有關永久性地離開香港的法定聲明表格 (第 MPF(S) – W(SD2) 號表格) 正本； d. a copy of the Letter of Release issued by the Inland Revenue Department (if applicable); and 稅務局發出的同意釋款書副本 (如適用)；及 e. Information on overseas / other places settlement: 海外／其他地方定居資料： i. Place other than Hong Kong where the scheme member is permitted to reside 計劃成員在香港以外獲准居住的地方 ii. Address 地址 Country / Region 國家／地區 iii. Telephone No. 電話號碼 (Country / Area Code 國家／地區編號) iv. Fax No. 傳真號碼 v. Email Address 電郵地址 vi. Departure Reason(s) 離港原因 Emigration 移民 Family reunion 家庭團聚 Marriage 結婚 Retirement 退休 Long-term overseas / other places employment 長期海外／其他地方受聘 Others 其他 (Please specify 請註明):

積金易助理介面

範例四: 為成員申索強積金權益

i. 基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益(權益)的表格

所需資料:

A. 申索人資料／計劃成員資料

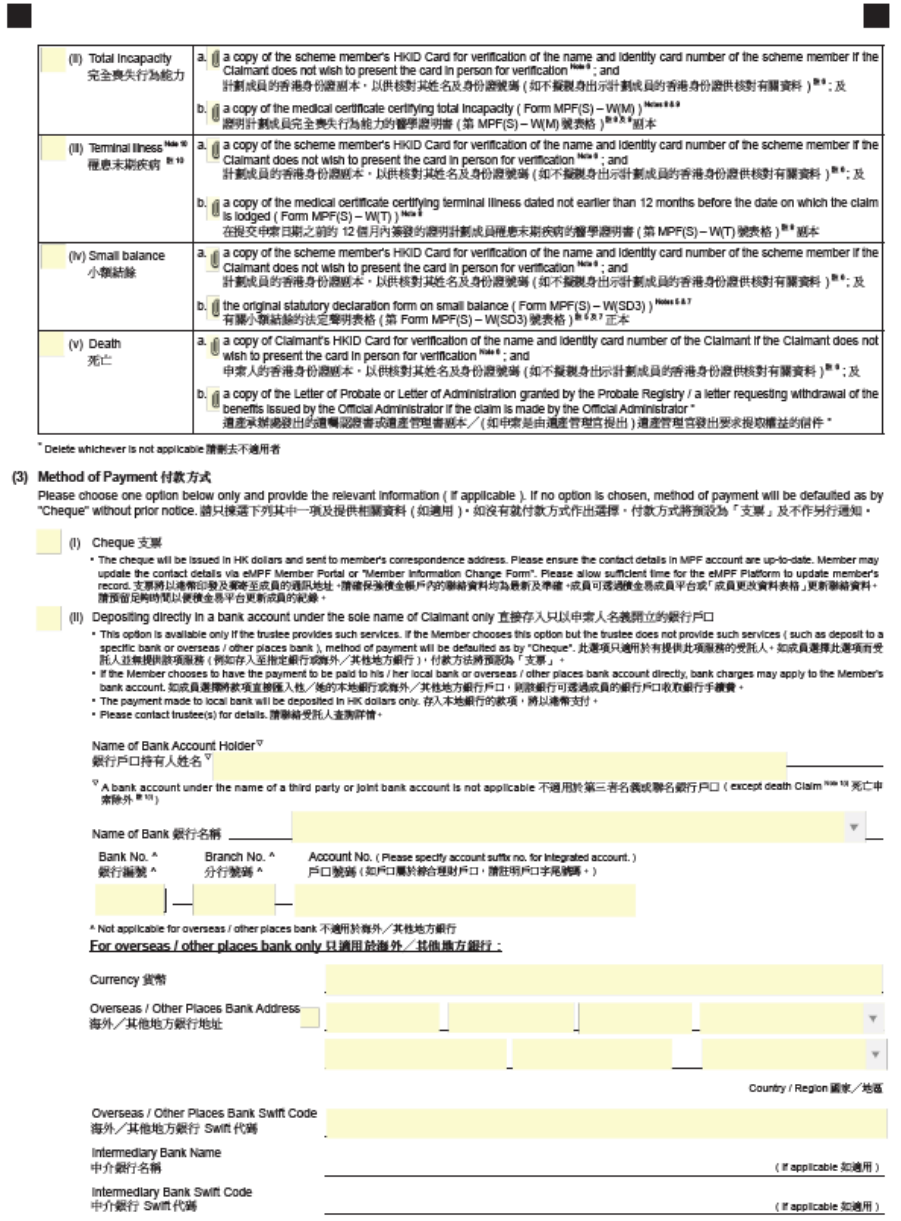
B. 申索資料

1. 帳戶資料
2. 申索權益的理由及**所需文件**
3. 付款方式

C. 授權及聲明

注意！

若所選擇的申索理由需要文件，此步驟必須上傳。
中介人應在填寫此表格前向客戶索取有關申請的所需文件。



(II) Total Incapacity 完全喪失行為能力	a. a copy of the scheme member's HKID Card for verification of the name and identity card number of the scheme member if the Claimant does not wish to present the card in person for verification [Note 9]; and 計劃成員的香港身份證副本，以供核對其姓名及身份證號碼（如不擬親身出示計劃成員的香港身份證供核對有關資料）[Note 9]；及 b. a copy of the medical certificate certifying total incapacity (Form MPF(S) – W(M)) [Notes 8 & 9] 證明計劃成員完全喪失行為能力的醫學證明書（第 MPF(S) – W(M) 號表格）[Notes 8 & 9] 副本
(III) Terminal Illness [Note 10] 罹患末期疾病 [Note 10]	a. a copy of the scheme member's HKID Card for verification of the name and identity card number of the scheme member if the Claimant does not wish to present the card in person for verification [Note 9]; and 計劃成員的香港身份證副本，以供核對其姓名及身份證號碼（如不擬親身出示計劃成員的香港身份證供核對有關資料）[Note 9]；及 b. a copy of the medical certificate certifying terminal illness dated not earlier than 12 months before the date on which the claim is lodged (Form MPF(S) – W(T)) [Note 8] 在提交申索日期之前的 12 個月內簽發的證明計劃成員罹患末期疾病的醫學證明書（第 MPF(S) – W(T) 號表格）[Note 8] 副本
(IV) Small balance 小額結餘	a. a copy of the scheme member's HKID Card for verification of the name and identity card number of the scheme member if the Claimant does not wish to present the card in person for verification [Note 9]; and 計劃成員的香港身份證副本，以供核對其姓名及身份證號碼（如不擬親身出示計劃成員的香港身份證供核對有關資料）[Note 9]；及 b. the original statutory declaration form on small balance (Form MPF(S) – W(SD3)) [Notes 6 & 7] 有關小額結餘的法定聲明表格（第 Form MPF(S) – W(SD3) 號表格）[Notes 6 & 7] 正本
(V) Death 死亡	a. a copy of Claimant's HKID Card for verification of the name and identity card number of the Claimant if the Claimant does not wish to present the card in person for verification [Note 9]; and 申索人的香港身份證副本，以供核對其姓名及身份證號碼（如不擬親身出示計劃成員的香港身份證供核對有關資料）[Note 9]；及 b. a copy of the Letter of Probate or Letter of Administration granted by the Probate Registry / a letter requesting withdrawal of the benefits issued by the Official Administrator if the claim is made by the Official Administrator * 遺產承辦處發出的遺囑認證書或遺產管理書副本／（如申索是由遺產管理官提出）遺產管理官發出要求提取權益的信件 *

* Delete whichever is not applicable 請刪去不適用者

(3) 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。

(I) 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寄交至成員的通訊地址。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。

(II) Depositing directly in a bank account under the sole name of Claimant only 直接存入只以申索人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 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. 如成員選擇將款項直接匯入其／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(s) 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▽

▽ 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 (except death Claim [Note 10] 死亡申索除外 [Note 10])

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)

積金易助理介面

範例四: 為成員申索強積金權益

i. 基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益(權益)的表格

所需資料:

A. 申索人資料／計劃成員資料

B. 申索資料

1. 帳戶資料
2. 申索權益的理由及所需文件
3. 付款方式

C. 授權及聲明



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. Claimant's overseas address / phone no.)
其他 (例如申索人海外地址／電話號碼)

C. AUTHORIZATION AND DECLARATION 授權及聲明

(1) Termination of MPF Account(s) with no residual balance 終止沒有剩餘款項的強積金帳戶 (if applicable 如適用)

I / We [Note 1] hereby authorize the eMPF Platform / the trustee(s) to terminate the relevant scheme member account(s) as referred to in Part B(1) upon :
本人／我們 [Note 1] 謹此授權積金易平台／受託人在以下情況終止在 B(1) 部分所述的計劃成員帳戶：

(I) withdrawal of the full amount of benefits with no residual balance in the said account(s); and
該帳戶內的權益已被全數提取，並無剩餘款項；及

(II) (for employee contribution account only) termination of the employment in relation to the contribution account; or
(只適用於僱員供款帳戶) 該供款帳戶所涉及的受僱已經終止；或

(III) (for self-employed person contribution account only) cessation of the self-employment, with effect from
(只適用於自僱人士供款帳戶) 終止自僱，生效日期為

Date 日期 DD / MM / YYYY 日／月／年

(2) For claim for payment of benefits on grounds of total incapacity only 只適用於基於完全喪失行為能力的理由而要求支付權益的申索

For the claim for payment of benefits on the grounds of total incapacity, I / We [Note 1] hereby declare that I / the scheme member last performed the relevant kind of work as set out in the medical certificate (Form MPF(S) – W(M)) before becoming totally incapacitated or the "Certificate of an employee's permanent unfitness for a particular type of work" [Note 8] and that contract of employment has been terminated.
本人／我們 [Note 1] 謹此就基於完全喪失行為能力的理由而要求支付權益的申索作出聲明，本人／計劃成員在完全喪失行為能力前，最後是執行醫學證明書 (第 MPF(S) – W(M) 號表格) 或「證明僱員永久不適合擔任某類工作的證明書」[Note 8] 所載有關類別的工作，而該僱傭合約已經終止。

(3) Declaration 聲明

By signing this form, the Claimant ("I / We") [Note 1] 在簽署本表格，申索人 (下稱「本人／我們」) [Note 1]：

(I) I have read and understood the General Terms and Conditions of the eMPF Platform, the Important Notes, the Explanatory Notes, the Guide to Claim for Payment of MPF Accrued Benefits ("Benefits") on Grounds of Permanent Departure from Hong Kong / Total Incapacity / Terminal Illness / Small Balance / Death and the PICS of the eMPF Platform and the Scheme(s). 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、基於永久性地離開香港／完全喪失行為能力／罹患末期疾病／小額結餘／死亡的理由而申索強積金累算權益 (「權益」) 指南及積金易平台及計劃「聲明」的內容。

(II) I / We declare that to the best of my / our knowledge and belief, the information given in this form and its attachments is correct and complete ✦.
本人／我們聲明，盡本人／我們所知所信，本表格及隨附文件所提供的資料均屬正確無誤且並無缺漏 ✦。

(III) I / We agree to indemnify and keep the eMPF Platform / the trustee(s) indemnified against any and all losses, costs, expenses, actions, proceedings suffered by the eMPF Platform / the trustee(s) as a result of any inaccuracy and / or incompleteness of the information provided by me / us and / or upon execution of any such request by the eMPF Platform / the trustee(s).
倘若本人／我們所提供之資料有任何錯誤及／或不完整，及／或積金易平台／受託人因執行相關指示，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。

(IV) I / We acknowledge that there may be bank charges incurred in relation to deposit payment to local bank or overseas / other places bank account. I / We agree and confirm to deduct the bank charges from my / our bank account (if any), associated with local bank or overseas / other places bank deposited. I / We understand that the payment amount accrued will be impacted by exchange rate (if applicable).
本人／我們確認據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／我們同意並確認於本人／我們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／我們明白累算權益金額將受滙率影響 (如適用)。

Signature of the Claimant(s) 申索人簽署 | Date 日期

✦ 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，任何人在就予 (I) 強制性公積金計劃管理局，(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。

積金易助理介面

範例四: 為成員申索強積金權益

ii. 基於已達到65歲退休年齡或提早退休的理由而申索強積金累算權益(權益)的表格

所需資料:

A. 申索人 / 計劃成員資料

B. 申索資料

1. 帳戶資料及提取選項
2. 申索權益的理由及**所需文件**
3. 付款方式

C. 授權及聲明



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:

WR

CLAIM FORM FOR PAYMENT OF MPF ACCRUED BENEFITS (BENEFITS) ON GROUNDS OF ATTAINING THE RETIREMENT AGE OF 65 OR EARLY RETIREMENT [FORM MPF(S) – W(R)]
基於已達到 65 歲退休年齡或提早退休的理由而申索強積金累算權益 (權益) 的表格 [第 MPF(S) – W(R) 號表格]

W(R)

Mandatory Provident Fund Schemes Ordinance (CAP. 485) 《強制性公積金計劃條例》(第 485 章)
Sections 159 and 160 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 159 及 160 條

Important Notes 重要事項 :

1. Please read the following notes before completing this form. 請於填寫本表格前參閱以下注意事項。
   (I) 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 MPF scheme(s) which has / have got onboard to the eMPF Platform. For details, please refer to the Appendix A: List of "Personal Information Collection Statement" ("PICS") of The eMPF Platform and The Onboarded MPF Schemes And Partial Withdrawal Options. 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 A: 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」) 及部分提取選項列表。
   (II) This form is applicable only if you have previously given your signature specimen to the eMPF Platform / the trustee(s). If not, please submit your request via eMPF Member Portal or visit eMPF Service Centre to provide your signature specimen for verification. 本表格只適用於如閣下已經提供簽署樣式予積金易平台／受託人，如閣下尚未提供有關紀錄，請透過積金易成員平台遞交指示或前往積金易服務中心以提供閣下的簽署樣式以作核對用途。
   (III) The "Scheme(s)" refers to the MPF scheme(s) which is / are listed in Part B(1) of this form. For details, please refer to the Appendix A. 「計劃」指與本表格 B(1) 部分所列的強積金計劃。詳情請參閱附錄 A。
   (IV) The "Trustee(s)" refers to the trustee(s) which is / are associated with the Scheme(s) listed in Part B(1) of this form. For details, please refer to the Appendix A. 「受託人」指於本表格 B(1) 部分所列的計劃其相關受託人。詳情請參閱附錄 A。
2. This form is to be completed by any person who wishes to claim for payment of benefits from the Scheme(s) on the grounds of attaining the retirement age of 65 or early retirement only. For a claim for payment of benefits on the grounds of early retirement, the scheme member must reach the age of 60 and have permanently ceased all employment and self-employment with no intention of becoming employed or self-employed again. For a claim for payment of benefits on other grounds, please use form MPF(S) – W(O). 本表格僅供擬基於已達到 65 歲退休年齡或提早退休的理由提出申索權益，要求從計劃提取權益的人士填寫。若基於提早退休的理由申索權益，計劃成員必須達到 60 歲，並已永久性地終止所有受僱及自僱工作，且無意再次受僱或自僱。若基於其他理由申索權益，請填寫第 MPF(S) – W(O) 號表格。
3. This form is not applicable for withdrawal of special voluntary contributions. If necessary, please complete "Special Voluntary Contributions Withdrawal / Scheme Termination Form". 本表格不適用於提取特別自願性供款。如需要，請填寫「特別自願性供款提取／終止計劃表格」。
4. 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。
5. 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。
6. The signature (including countersign) in this form should match with the signature specimen of the eMPF Platform / the trustee(s) (please refer to point 1(II) of the Important Notes). 本表格的簽署 (包括加簽) 必須與積金易平台／受託人的簽署樣式相符 (請參閱重要事項第 1(II) 點)。
7. Please read the Explanatory Notes and "Guide to Claim for Payment of MPF Accrued Benefits ("Benefits") on Grounds of Attaining The Retirement Age of 65 or Early Retirement" carefully before completing this form. 填寫本表格前，請先參閱註釋及《基於已達到 65 歲退休年齡或提早退休的理由而申索強積金累算權益 (「權益」) 指南》。
8. The personal data to be supplied in support of this claim for payment of benefits are to be used for processing your claim. The personal data you supply may, for such purpose, be transferred to the relevant service provider(s), the trustee(s) and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority ("MPFA"). 就此項申索權益申請提供的個人資料，將用作處理你的申索。你提供的個人資料可能會為該目的而轉交相關服務提供者、受託人及政府或規管機構，包括強制性公積金計劃管理局 (「積金局」)。
9. If (I) mobile phone no., (II) email address and / or (III) correspondence address of the scheme member provided on this form is different from the records of the eMPF Platform AND the signature in this form matches the signature specimen previously given to the eMPF Platform / the trustee(s), the eMPF Platform will update those information to the concerned member account(s). 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你之前給予積金易平台／受託人的簽署樣式相符，積金易平台便會更新該資料至相關成員帳戶。
10. 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 Scheme(s) referred / listed in Part B(1) below. For details, please refer to the Appendix A. 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(1) 部分所指／所列計劃「聲明」處理。詳情請參閱附錄 A。

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

積金易助理介面

範例四: 為成員申索強積金權益

ii. 基於已達到65歲退休年齡或提早退休的理由而申索強積金累算權益(權益)的表格

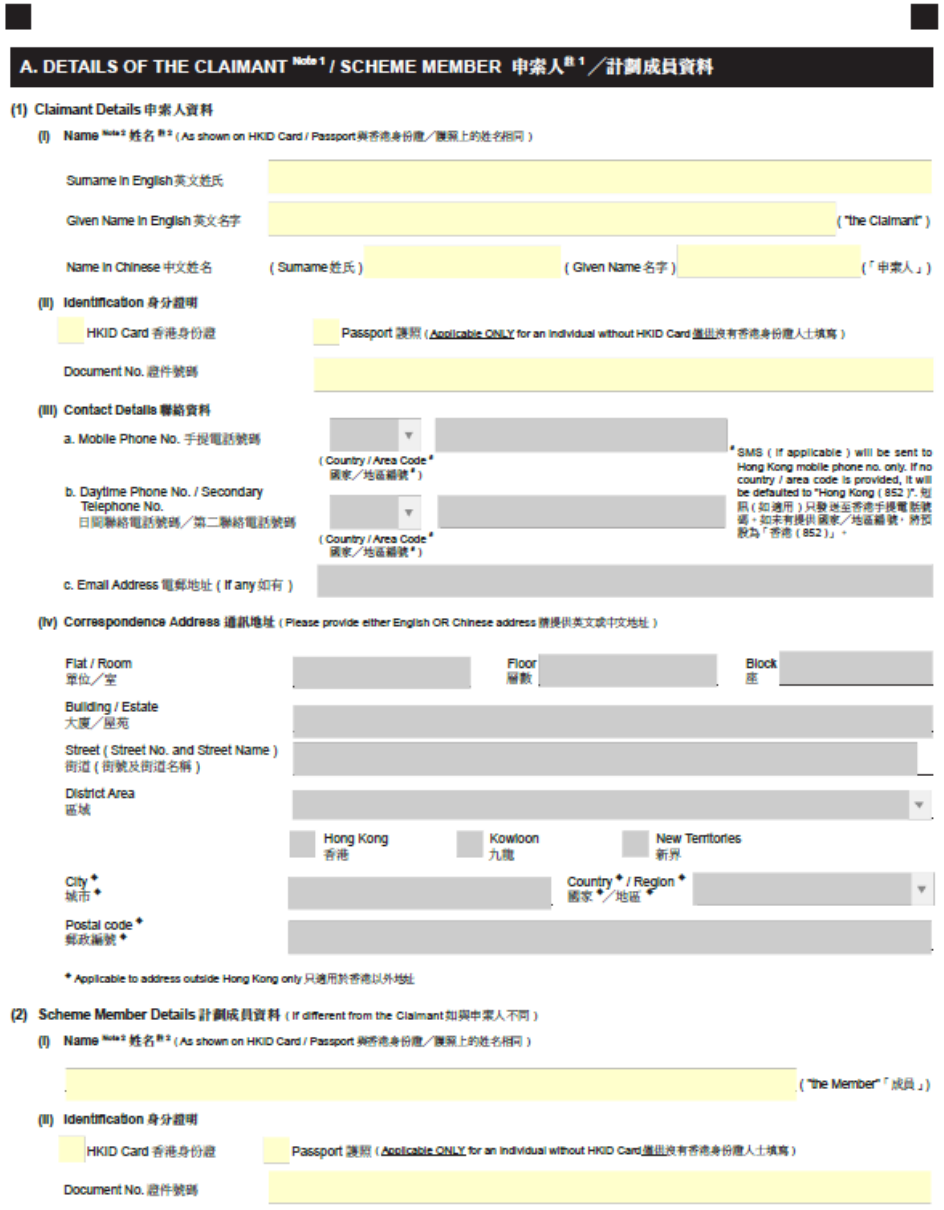
所需資料:

A. 申索人 / 計劃成員資料

B. 申索資料

1. 帳戶資料及提取選項
2. 申索權益的理由及**所需文件**
3. 付款方式

C. 授權及聲明



A. DETAILS OF THE CLAIMANT Note 1 / SCHEME MEMBER 申索人註 1 /計劃成員資料

(1) Claimant Details 申索人資料

(I) Name Note 2 姓名註 2 (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 ("the Claimant")

Name in Chinese 中文姓名 (Surname 姓氏) (Given Name 名字) (「申索人」)

(II) 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

(III) Contact Details 聯絡資料

a. Mobile Phone No. 手提電話號碼 (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)」。

b. 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 *)

c. Email Address 電郵地址 (If any 如有)

(IV) 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 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

(2) Scheme Member Details 計劃成員資料 (If different from the Claimant 如與申索人不同)

(I) Name Note 2 姓名註 2 (As shown on HKID Card / Passport 與香港身份證/護照上的姓名相同)

("the Member" 「成員」)

(II) 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

積金易助理介面

範例四: 為成員申索強積金權益

ii. 基於已達到65歲退休年齡或提早退休的理由而申索強積金累算權益(權益)的表格

所需資料:

A. 申索人 / 計劃成員資料

B. 申索資料

1. 帳戶資料及提取選項
2. 申索權益的理由及**所需文件**
3. 付款方式

C. 授權及聲明

注意！

若所選擇的申索理由需要文件，此步驟必須上傳。
中介人應在填寫此表格前向客戶索取有關申請的所需文件。



B. DETAILS OF THE CLAIM 申索資料

(1) Account information and withdrawal options 帳戶資料及提取選項

Please select option (I) or (II) and provide the relevant information (if applicable). If there are not enough fields for showing selected scheme(s) and account(s), please fill in additional form(s) for withdrawal. 請選擇選項 (I) 或 (II) 及提供相關資料 (如適用) 。如沒有足夠欄位顯示指定的計劃及帳戶，請填寫額外表格以辦理申索。

Account information 帳戶資料	A Lump Sum 整筆	One-off Partial Withdrawal Amount from Each Member Account 從每一個成員帳戶一次性部份提取金額
(I) All member accounts under the eMPF Platform 積金易平台下所有成員帳戶		HKD 港幣 元 ^
OR 或		
(II) Scheme name 計劃名稱 (Please refer to the Appendix A for scheme name and select option (a) or (b). 計劃名稱請參閱附錄 A 及揀選選項 (a) 或 (b)。)		
(a) All member account(s) under the Scheme 計劃內所有成員帳戶		HKD 港幣 元 ^
(b) Selected member account(s) under the Scheme 計劃內的指定成員帳戶 (Please specify the scheme member account no. 請註明計劃成員帳戶號碼)		
I.		HKD 港幣 元
II.		HKD 港幣 元

* Please refer to the Appendix A and / or check with the eMPF Platform or the relevant trustee(s) for the requirements of one-off partial withdrawal (if applicable). 請參閱附錄 A 及／或向積金易平台或有關受託人查詢一次性部份提取的規定 (如適用) 。

^ One-off partial withdrawal amount must be the same among the member accounts under this option. If you wish to withdraw different amount for the member accounts as selected, please select option Part B(1)(I)(b). 此選項下成員帳戶的一次性部分提取金額必須相同。如你擬就揀選的成員帳戶提取不同的金額，請選擇選項 B(1)(I)(b) 部分。

(2) Grounds for claiming benefits and the required documents 申索權益的理由及所需文件

Please tick the appropriate box(es) and provide the relevant information as applicable. 請在適當空格內填上剔號及提供適用的相關資料。

I have previously withdrawn the benefits by instalments on the below grounds from the accounts specified in Part B(1), therefore, I DO NOT provide the required documents for this claim again. 本人之前曾基於下述理由從 B(1) 部分指明的帳戶分期提取權益，因此無須就是次申索再次提供所需文件。

Grounds 理由	Required documents 所需文件
	• Apart from the below listed documents, additional documents may be requested on a case-by-case basis by the eMPF Platform. 除下列所需文件外，積金易平台會視乎具體情況要求提供額外文件。 • If you need to submit additional claim form(s) for more than one scheme, please indicate all relevant scheme names and member account numbers on the required documents. 如閣下需就多於一個計劃提交額外申索表格，請於所需文件上註明相關的計劃名稱及成員帳戶號碼。
Attaining the retirement age of 65 已達到 65 歲退休年齡	(I) a copy of the scheme member's HKID Card for verification of the name, date of birth and identity card number of the scheme member if the Claimant does not wish to present the card in person for verification 計劃成員的香港身份證副本，以供核對其姓名、出生日期及身份證號碼 (如不擬親身出示計劃成員的香港身份證供核對有關資料) ；
Early retirement 提早退休	(I) a copy of the scheme member's HKID Card for verification of the name, date of birth and identity card number of the scheme member if the Claimant does not wish to present the card in person for verification ; and 計劃成員的香港身份證副本，以供核對其姓名、出生日期及身份證號碼 (如不擬親身出示計劃成員的香港身份證供核對有關資料) ；及 (II) the original statutory declaration form on early retirement (MPF(S) – W(SD1)) MPF(S) – W(SD1) 號表格) 正本
For a scheme member whose HKID Card does not contain the month and / or day of birth, evidence showing the scheme member's date of birth 如計劃成員的香港身份證並未載有出生月份及／或日子，請提供載有該計劃成員出生日期的證明 ：	
(I) a copy of the scheme member's passport or other travel document showing the month and / or day of birth; or 載有計劃成員出生月份及／或日子的護照或其他旅遊證件的副本；或	
(II) a copy of the scheme member's HKID Card with the month and day of the issue date of the HKID Card circled or by other means to indicate that the scheme member wishes to use the month and day of the issue date of the HKID Card as the month and day of birth; or 在計劃成員的香港身份證副本上圈出 (或以其他方式顯示) 該身份證的簽發日期的月份及日子，以表示計劃成員擬採用其香港身份證的簽發日期的月份及日子作為其出生月份及日子；或	
(III) the original statutory declaration of the scheme member's date of birth 有關計劃成員出生日期的法定聲明 正本	

積金易助理介面

範例四: 為成員申索強積金權益

ii. 基於已達到65歲退休年齡或提早退休的理由而申索強積金累算權益(權益)的表格

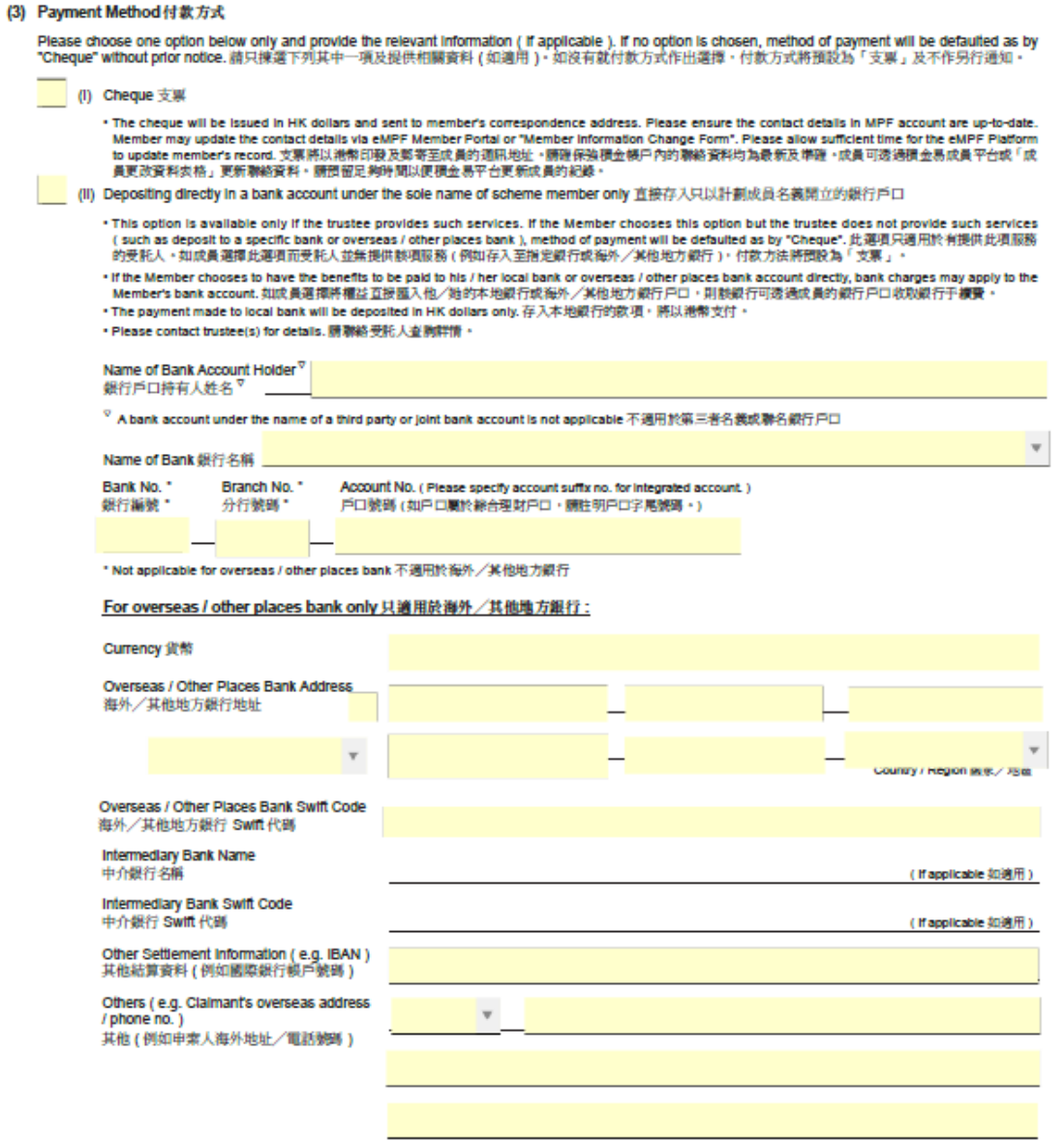
所需資料:

A. 申索人 / 計劃成員資料

B. 申索資料

1. 帳戶資料及提取選項
2. 申索權益的理由及**所需文件**
3. 付款方式

C. 授權及聲明



(3) Payment Method 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。

(I) 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。

(II) 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 benefits 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. 如成員選擇將權益直接匯入他／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(s) 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▽

▽ 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

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)

Others (e.g. Claimant's overseas address / phone no.)
其他 (例如申索人海外地址／電話號碼)

積金易助理介面

範例四: 為成員申索強積金權益

ii. 基於已達到65歲退休年齡或提早退休的理由而申索強積金累算權益(權益)的表格

所需資料:

A. 申索人 / 計劃成員資料

B. 申索資料

1. 帳戶資料及提取選項
2. 申索權益的理由及**所需文件**
3. 付款方式

C. 授權及聲明

C. AUTHORIZATION AND DECLARATION 授權及聲明

(1) Termination of MPF Account(s) with no residual balance 終止沒有剩餘款項的強積金帳戶 (if applicable 如適用)

I / We [Note1] hereby authorize the eMPF Platform / the trustee(s) to terminate the relevant scheme member account(s) as referred to in Part B(1) upon :
本人／我們 [Note1] 謹此授權積金易平台／受託人在以下情況終止在 B(1) 部分所述的計劃成員帳戶：

(I) withdrawal of the full amount of benefits with no residual balance in the said account(s); and
該帳戶內的權益已被全數提取，並無剩餘款項；及

(II) (for employee contribution account only) termination of the employment in relation to the contribution account; or
(只適用於僱員供款帳戶) 該供款帳戶所涉及的受僱已經終止；或

(III) (for self-employed person contribution account only) cessation of the self-employment, with effect from
(只適用於自僱人士供款帳戶) 終止自僱，生效日期為

Date 日期 _____ DD / MM / YYYY 日／月／年

(2) Declaration 聲明

By signing this form, the Claimant ("I / we") [Note1] 在簽署本表格，申索人 (下稱「本人／我們」) [Note1]：

(I) I have read and understood the General Terms and Conditions of the eMPF Platform, the Important Notes, the Explanatory Notes, the Guide to Claim for Payment of MPF Accrued Benefits ("Benefits") on Grounds of Attaining The Retirement age of 65 or Early Retirement and the PICS of the eMPF Platform and the Scheme(s). 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、基於已達到 65 歲退休年齡或提早退休的理由而申索強積金累算權益 (「權益」) 指南及積金易平台及計劃「聲明」的內容。

(II) I / We declare that to the best of my / our knowledge and belief, the information given in this form and its attachments is correct and complete *. 本人／我們聲明，盡本人／我們所知所信，本表格及隨附文件所提供的資料均屬正確無誤且並無缺漏 *。

(III) I / We agree to indemnify and keep the eMPF Platform / the trustee(s) indemnified against any and all losses, costs, expenses, actions, proceedings suffered by the eMPF Platform / the trustee(s) as a result of any inaccuracy and / or incompleteness of the information provided by me / us and / or upon execution of any such request by the eMPF Platform / the trustee(s).
倘若本人／我們所提供之資料有任何錯誤及／或不完整，及／或積金易平台／受託人因執行相關指示，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。

(IV) I / We acknowledge that there may be bank charges incurred in relation to deposit payment to local bank or overseas / other places bank account. I / We agree and confirm to deduct the bank charges from my / our bank account (if any) associated with local bank or overseas / other places bank deposited. I / We understand that the payment amount accrued will be impacted by exchange rate (if applicable).
本人／我們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／我們同意並確認於本人／我們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／我們明白累算權益金額將受匯率影響 (如適用)。

(V) I / We acknowledge that there may be withdrawal fee incurred if the number of withdrawal exceeds the limit of the scheme(s) listed in Appendix A. Additional withdrawal will be subject to a handling charge for each withdrawal. I / We agree and confirm to deduct the said fees from the withdrawal value (if applicable). 本人／我們確認獲悉如提取次數超出附錄 A 中計劃所列的次數，可能會衍生提取費用。額外提取則需每次從提取款項中扣除手續費。本人／我們同意並確認從提取款項中扣除該手續費 (如適用)。

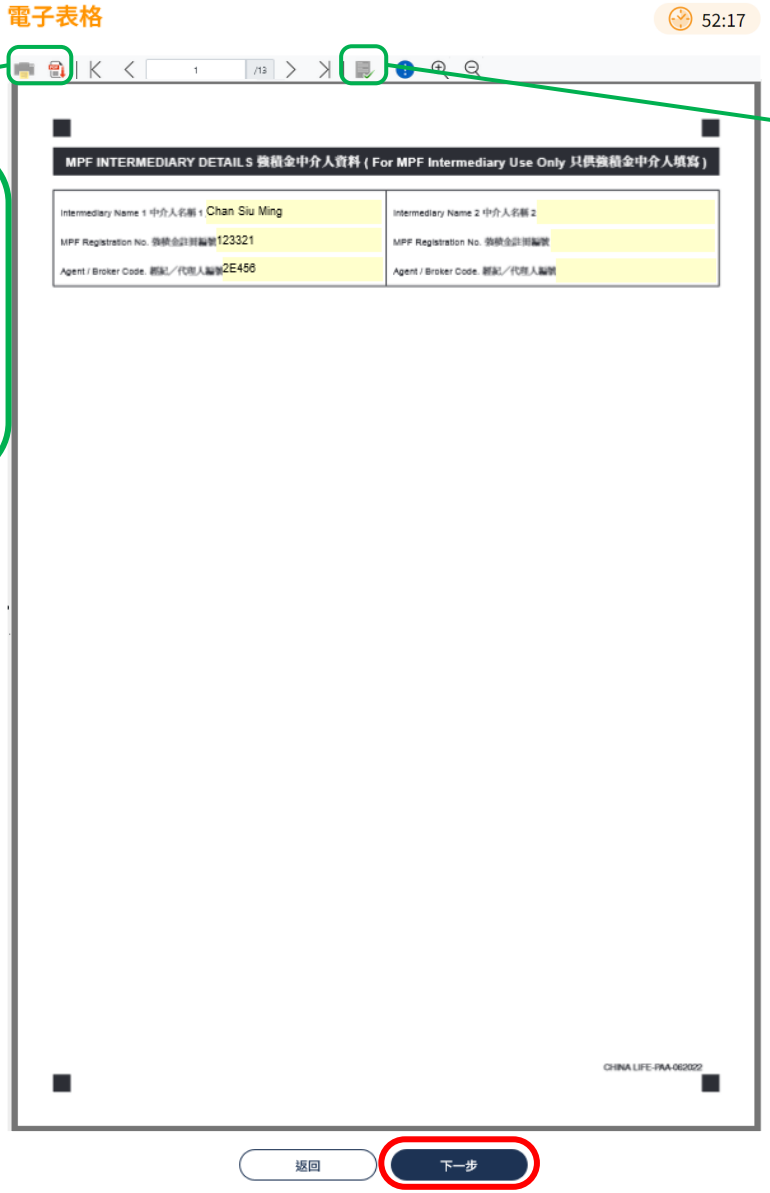
Signature of the Claimant(s) 申索人簽署	Date 日期
	DD 日 / MM 月 / YYYY 年

積金易助理介面

範例四: 為成員申索強積金權益

小貼士：

輸入完成後，中介人可點擊**列印**或**匯出PDF**來儲存表格副本



點擊**下一步**前，中介人可點擊**驗證**以查驗漏報卻又必需的資料

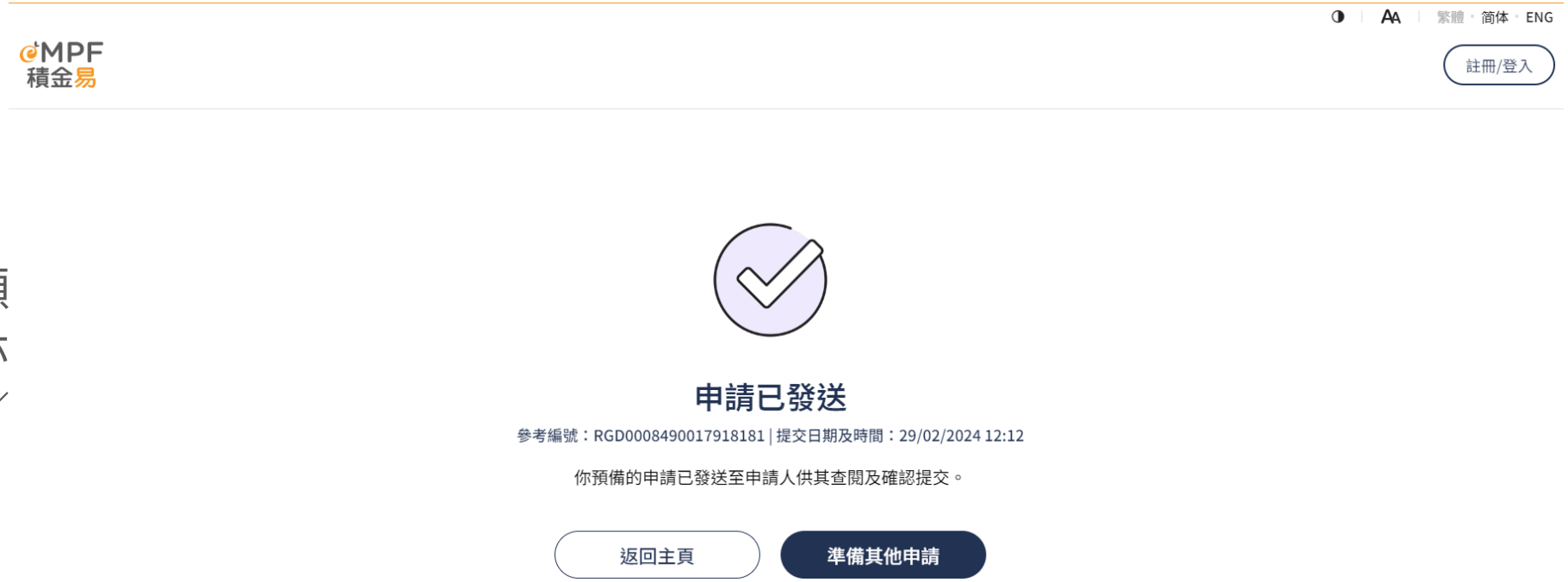
積金易助理介面

範例四: 為成員申索強積金權益

選擇申請人身分和申請類別 > 選擇申請表 > **輸入申請人資料並提交** > 申請人核對及確認

細閱條款與細則並到達網頁底部後按**「接受」**

成功遞交後，系統會顯示確認訊息。中介人亦同時會收到電子郵件／短訊通知



積金易助理介面

範例四: 為成員申索強積金權益

選擇申請人身分和申請類別 > 選擇申請表 > 輸入申請人資料並提交 > **申請人核對及確認**

- 中介人提醒成員登入積金易後，按**「待辦事項」**進入頁面，然後選擇**「申索強積金權益」**的事項
- 成員須檢視，再確認及提交申請資料以完成整個強積金指示
- 成員提交申請後，平台將透過中介人已驗證的通訊方式向其發送通知



為僱主提交申請


9:41
您好! 齊整合
積金易戶口號碼: 398571928Y
我的帳戶
帳戶餘額
(損益)
$ 900,000.00
▲ $ 50,000.00
23% – 宏利環球精選強積金計劃
$ 207,000.00
▲ $ 15,000.00
投資組合
我的積金易
行動項目
我的戶口
宏利MPF中華威力基金
$ 12,450.00
我的計劃
個人帳戶
轉移
選擇心儀的強積金受託人及強積金計劃作出轉移。
投資
提取

積金易助理介面

選擇申請人身分和申請類別 → 選擇受託人和計劃名稱 → 選擇申請表 → 輸入申請人資料並提交

範例五: 為僱主登記強積金計劃

- 選擇申請人身分（**僱主**）
- 點選相應的申請類別（**登記計劃**），然後點擊「**下一步**」

小貼士:

- 中介人請留意申請時限。



積金易助理介面

範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 | **選擇受託人和計劃名稱** | 選擇申請表 | 輸入申請人資料並提交

請選擇**受託人**和**計劃**，然後點擊**「下一步」**



積金易助理介面

範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > **選擇申請表** > 輸入申請人資料並提交

電子表格

54:54

選擇**僱主申請協議書**

僱主申請協議書 ›

返回

積金易助理介面

範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > **選擇申請表** > 輸入申請人資料並提交

選擇表格後，請細閱重要資訊，然後按**確定**

注意！

如僱主並不符合以下**所有**條件，中介人請協助僱主直接在積金易平台提交**登記計劃**指示。

- 實體類別*為「金融／財務機構」或 「主動非財務實體」；
- 只有一個工資組別；
- 以支票繳付供款；及
- 不涉及成員自願性供款



*僱主需在申請時填寫**實體稅務居民自我證明**，從以下三個類別中選擇**實體類別**：

1. 金融／財務機構
2. 主動非財務實體
3. 被動非財務實體

積金易助理介面

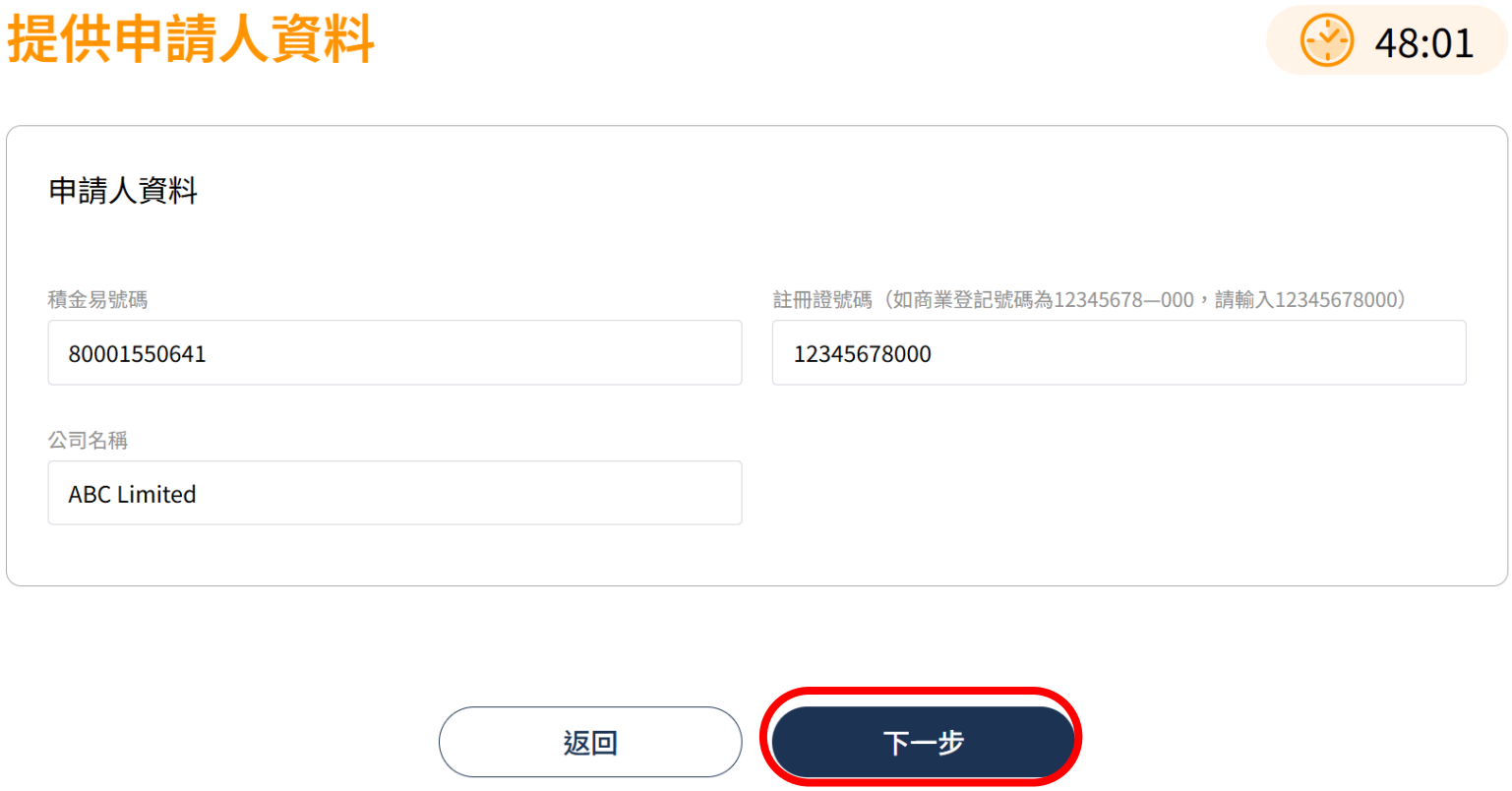
範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > **輸入申請人資料並提交**

請輸入申請人的

1. **積金易號碼;**
2. **商業登記號碼** 及
3. **公司名稱**

然後點擊**下一步**



積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

所需資料:

A. 僱主資料
B. 關連人士資料
C. 計劃詳情及行政安排
D. 自願性供款
E. 稅務居民身分自我證明
F. 個人資料收集聲明
G. 授權及聲明



強積金計劃 A

強積金計劃 A
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

PARTICIPATION AGREEMENT FOR RELEVANT EMPLOYER
有關僱主參與協議

BETWEEN 有關雙方：

(1) 強積金受托人公司 A ITED, whose registered office is at 27/F, YF Life Tower, 33 Lockhart Road, Wanchai, Hong Kong (the "Trustee"); and
冊辦事處位於香港灣仔駱克道 33 號萬通保險大廈 27 樓（下稱「受託人」）；及

(2) The Applicant / Employer, whose name and address are given in the MASS Mandatory Provident Fund Scheme – Employer Participation Agreement ("Employer Participation Agreement ") attached hereto (the "Employer").
申請人 / 僱主（下稱「僱主」），其名稱及地址填寫在萬全強制性公積金計劃 – 僱主參與協議（下稱「僱主參與協議」）內。

RECITALS 敘文：

(A) The Trustee is the Trustee of the MASS Mandatory Provident Fund Scheme (the "Master Trust Scheme"), which was established by Trust Deed ("the Deed") dated 27 January 2000 made by the Trustee as amended from time to time.
強積金計劃 A 下稱「集成信託計劃」）依據於 2000 年 1 月 27 日由其受託人以不時修改的信託契約（下稱「有關契約」）成立，受託人為集成信託

(B) The Employer wishes to join the Master Trust Scheme in order to establish a retirement benefits scheme (the "Scheme") for the benefit of its employees.
僱主希望參與集成信託計劃，用以成立為保障其僱員利益之退休保障計劃（下稱「本計劃」）。

(C) The Scheme shall be governed by the Deed and this Participation Agreement.
本計劃將受有關契約及本參與協議規限。

PROVISIONS 條文：

1. Unless otherwise stated, words and expressions used in this Participation Agreement (including the Recitals) shall have the meanings given to them in the Deed. 除非另有規定，本參與協議中使用的文字和表述（包括敘文）應具有有關契約所給予的涵義。

2. The Employer hereby establishes a Scheme with effect from Scheme Commencement Date specified in the Employer Participation Agreement, to be governed by the terms of the Deed and this Participation Agreement.
僱主現成立一個計劃，於僱主參與協議的計劃生效日起生效，並受有關契約及本參與協議的條款規限。

3. The Employer hereby covenants with the Trustee to comply with and be bound by the provisions of the Deed and this Participation Agreement and all applicable laws and regulations.
僱主現向受託人契諾遵守有關契約及本參與協議及所有適用法律和法規的規定並受其約束。

4. The Employer warrants that the information from time to time to be provided by the Employer in relation to contributions and as to the age, salary, length of service, benefits, Investment Mandates, Switching Instruction Forms and otherwise in relation to each Member will be correct in all respects.
僱主保證，由僱主就供款不時提供的資料及關於每一名成員的年齡、薪金、服務年期、福利、投資授權、轉換指令表格及其他資料在所有方面均是正確的。

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

A. 僱主資料

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 受託人 A ("the Trustee" 「受託人」)

(ii) Scheme Name 計劃名稱 強積金計劃 A ("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 Leonards House ("Participating Employer")

中文 倫納德之家 (「參與僱主」)

(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)

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

A. 僱主資料

Business / Other Registration No. [1] 商業／其他註冊證號碼 [1] 88834978000

Branch No. [1] 分行號碼 [1] 000

[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 88834978000

(ii) Date of Incorporation 註冊日期 01/09/2022 DD / MM / YYYY 日／月／年

(iii) Place of Incorporation 註冊地點 Hong Kong

(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
- [x] (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

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

A. 僱主資料

(6) Nature of Business 業務性質

- [x] (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: 100

(8) Registered Address 註冊地址 (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)

- [x] Flat / Room 單位／室: 1
- Floor 層數: 2
- Block 座: 3
- Building / Estate 大廈／屋苑: ABC Building
- Street (Street No. and Street Name) 街道 (街號及街道名稱): 123 Road
- District Area 區域: Central
- [x] Hong Kong 香港
- [ ] Kowloon 九龍
- [ ] New Territories 新界
- City ◆ 城市 ◆:
- Country ◆ / Region ◆ 國家 ◆／地區 ◆: Hong Kong
- Postal code ◆ 郵政編號 ◆:

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

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

B. 關連人士資料

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: Lee

Given Name in English 英文名字: Wai Ling

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

c. Job Title 職銜: Manager

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: A345****

e. Date of Birth 出生日期: 29/05/1981 DD / MM / YYYY 日／月／年

f. Nationality 國籍: Chinese

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

B. 關連人士資料

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 層數	10	Block 座	F
Building / Estate 大廈／屋苑	ABC Plaza				
Street (Street No. and Street Name) 街道 (街號及街道名稱)	456 Road				
District Area 區域	Central				

✓ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆		Country ◆ / Region ◆ 國家 ◆／地區 ◆	Hong Kong
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 (Country / Area Code * 國家／地區編號 *) 54323456

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貴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。)

wailing@abc.com

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

B. 關連人士資料

(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** (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貴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。)

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

B. 關連人士資料

(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 company type. 適用於法團／合夥經營／獨資經營／其他公司類別。
- 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: Lee

Given Name in English 英文名字: Wai Ling

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

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: A345****

d. **Date of Birth 出生日期**: 29/05/1981 DD / MM / YYYY 日／月／年

e. **Nationality 國籍**: Chinese

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: C　Floor 層數: 10　Block 座: F

Building / Estate 大廈／屋苑: ABC Plaza

Street (Street No. and Street Name) 街道 (街號及街道名稱): 456 Street

District Area 區域: Central

☑ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆

Country ◆ / Region ◆ 國家 ◆／地區 ◆: Hong Kong

Postal code ◆

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

C. 計劃詳情及行政安排

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

(1) Scheme Commencement Date 計劃生效日期 21/06/2024 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(11) and attach for submission. 如貴公司有多於一個工資組別，請影印 C(2) 至 C(11) 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. 請只揀選下列其中一項。)

✓ a. Regular Employee 一般僱員 b. Casual Employee 臨時僱員

(ii) Payroll Group Name 工資組別名稱

(e.g. 例如 : ABC Limited Company - N.T. branch / ABC Reporting Centre / Monthly Payroll Group / ABC 有限公司 - 新界分店／ ABC 報關中心／每月工資組別)

Perm Staff

(iii) Payroll Group ID 工資組別編號 (e.g. 例如 : Tuen Mun 1 / TM01 / PG1)

REE1

(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。

✓ (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

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

C. 計劃詳情及行政安排



(6) 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) 30/06/2024 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。) 28/06/2024 DD 日

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

C. 計劃詳情及行政安排

小貼士:

- 中介人可為僱主選擇**付款結算書安排**。
- 建議選擇 **(ii)** 或 **(iii)**， 平台將會以僱主偏好的電子通訊選項發出付款結算書（包括／不包括供款資料）。

(7) 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。

Form Centre
表格中心

☑ (ii) Cheque 支票 (i.e. Cashier Order / Cheque / E-Cheque 即本票／支票／電子支票)

[2] The set up 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 set up. Please scan the QR code and complete "DDA Form" and settle contribution by other payment means before direct debit set up is completed. 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，通知貴公司有關直接扣帳申請成功設立。請掃描此二維碼及填寫「直接付款授權表格」及於直接扣帳辦妥前，請透過其他付款途徑付款。

(8) Remittance Statement ("RS") Arrangements 付款結算書安排 (Please choose one of the options below. If no selection 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 appliicable) 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 appliicable) 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。

(9) 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。如貴公司擬另作安排，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貴公司供款，你亦可能須要支付未繳供款的附加費。

僱主申請協議書

C. 計劃詳情及行政安排

(10) 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 selection 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

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

Leonards House

Name of Bank 銀行名稱 JPMorgan Chase Bank, National Association

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。)
001	500	54748947

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

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

D. 自願性供款

E. 稅務居民身分自我證明

D. VOLUNTARY CONTRIBUTIONS 自願性供款

If you would like to make Employer Voluntary Contributions, please scan the QR code and complete the "Voluntary Contributions Application / Change Form". 如貴公司擬作出僱主自願性供款，請掃描此二維碼及填寫「自願性供款申請／更改表格」。

Form Centre
表格中心

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). 這是閣下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）。
- 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，並提供相關資料讓閣下判定是否屬某一稅務管轄區的稅務居民。一般而言，閣下的稅務居留司法管轄區／國家會根據閣下的居住地點而定，因此，如閣下有多於一處居所（雙重居住地），閣下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，請諮詢閣下的稅務顧問或瀏覽 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. 如閣下（若閣下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]，閣下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閣下／該帳戶持有人於此自我證明申報的資料，閣下／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，而相關資料或會與閣下／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，閣下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。

僱主申請協議書

E. 稅務居民身分自我證明

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。)

(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 [6] 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／或國家 (香港以外)，以及 **(ii)** 各司法管轄區／國家發出予帳戶持有人的稅務編號 [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 [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. 若閣下選擇理由 B，請在下方解釋無法取得稅務編號的原因。
a.				
b.				
c.				

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

E. 稅務居民身分自我證明

(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 _____

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

F. 個人資料收集聲明

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、處理及持有閣下的個人資料，用作處理閣下強積金計劃的登記和閣下強積金帳戶管理的用途。閣下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。若閣下已註冊積金易平台，即表示閣下已同意我們的收集個人資料聲明，其最新版本載於下文。若閣下尚未註冊，請參閱我們以下的收集個人資料聲明。閣下透過此表格提供個人資料，即表示閣下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、處理及持有閣下的個人資料。

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。本聲明旨在向閣下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、處理及持有閣下的個人資料、有關個人資料的用途和可能獲提供有關個人資料的對象，以及閣下可根據《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 . 閣下可於本公司的《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、保留及保護閣下個人資料的政策。

僱主申請協議書

G. 授權及聲明

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. 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。

積金易助理介面

範例五: 為僱主登記強積金計劃

僱主申請協議書

中介人資料

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	

* 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)

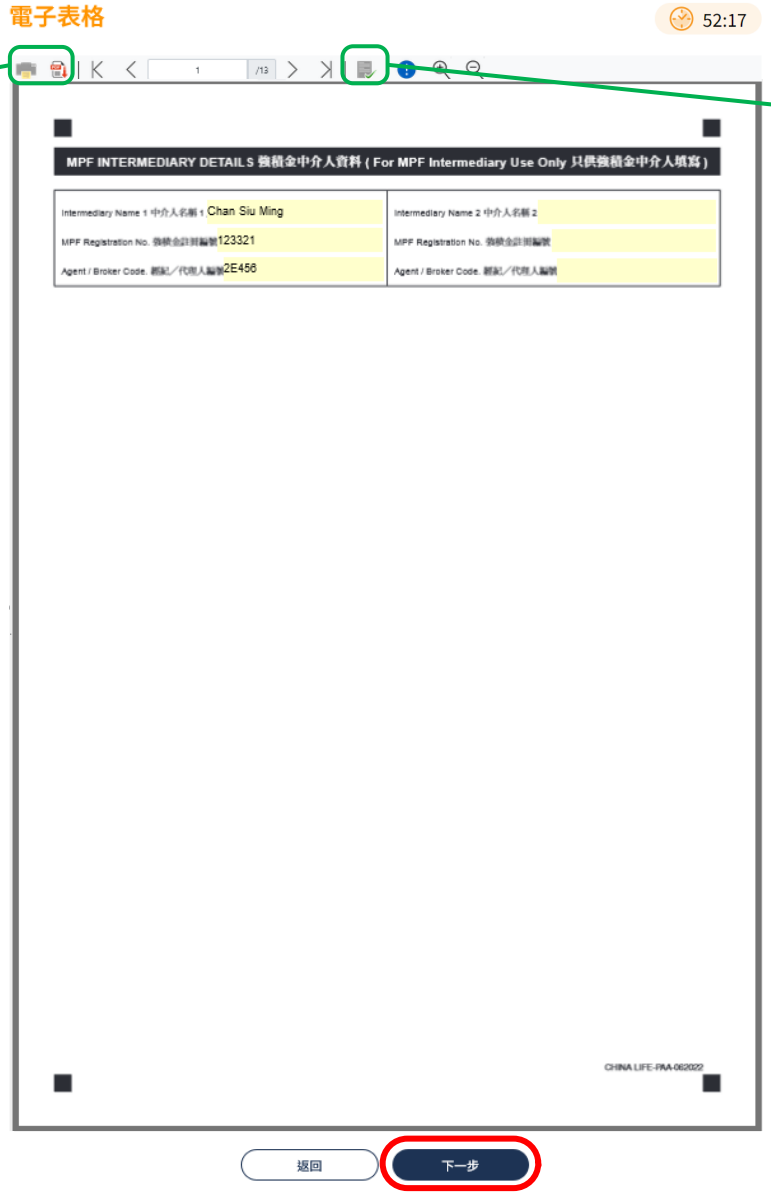
Intermediary Name 1 中介人名稱 1 Chan Tai Man	Intermediary Name 2 中介人名稱 2
MPF Registration No. 強積金註冊編號 123321	MPF Registration No. 強積金註冊編號
Agent / Broker Code. 經紀／代理人編號 2E456	Agent / Broker Code. 經紀／代理人編號

積金易助理介面

範例五: 為僱主登記強積金計劃

小貼士：

輸入完成後，中介人可點擊**列印**或**匯出PDF**來儲存表格副本



點擊**下一步**前，中介人可點擊**驗證**以查驗漏報卻又必需的資料

積金易助理介面

範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > **輸入申請人資料並提交**

細閱**條款及細則**後，到網頁底部按**「接受」**。



積金易助理介面

範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > **輸入申請人資料並提交**

成功遞交後，系統會顯示確認訊息。中介人亦同時會收到電子郵件／短訊通知



小貼士：

- 請提醒申請人登入積金易僱主平台及選擇**「待辦事項」**以核對並提交申請。

積金易助理介面

範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > **輸入申請人資料並提交**

僱主登入後，在**待辦事項**中
選擇**登記**的事項



積金易助理介面

範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > **輸入申請人資料並提交**

僱主可知悉申請及中介人詳情，然後按**下一步**

來自強積金註冊中介人／代表的申請正待你查閱

你的強積金註冊中介人／代表為你預備了以下申請，並待你查閱及提交。請注意，在你確定提交之前，該申請不會進行處理。

申請詳情

功能	預備日期及時間	計劃名稱
登記	21/06/2024 01:45	

參考編號

EAD1508603000035314

強積金註冊中介人／代表詳情

身分類別	電郵地址	手機號碼
強積金中介人	chantaiman@abc.com	+852 57384734

姓名	經紀／代理人編號
Chan Tai Man	

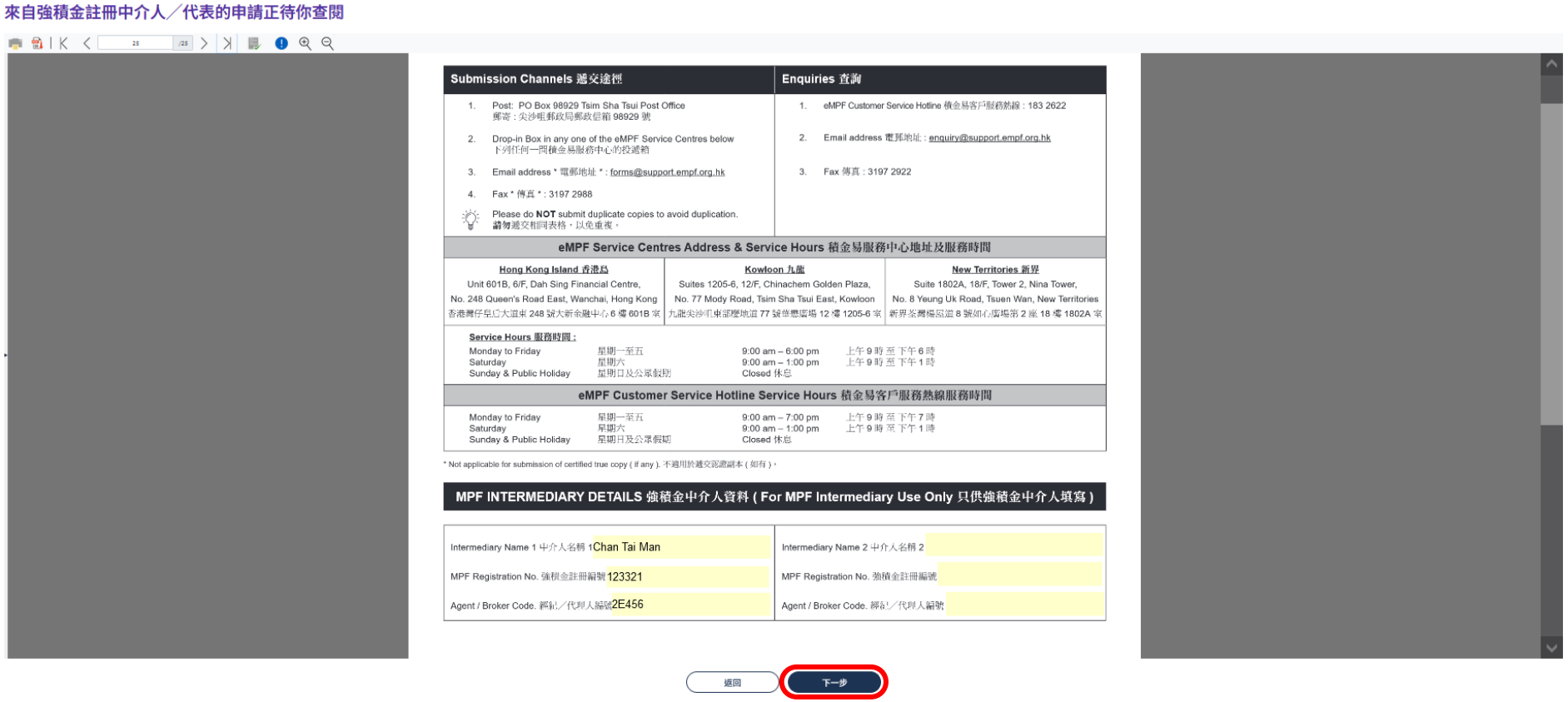
返回　下一步

積金易助理介面

範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > **輸入申請人資料並提交**

核對由中介人填寫的電子表格，然後按**下一步**



積金易助理介面

範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > **輸入申請人資料並提交**

按**確定**以提交申請



積金易助理介面

範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > **輸入申請人資料並提交**

接受條款與細則



積金易助理介面

範例五: 為僱主登記強積金計劃

選擇申請人身分和申請類別 > 選擇受託人和計劃名稱 > 選擇申請表 > **輸入申請人資料並提交**

申請成功提交後，中介人會透過
電郵／短訊收到平台相關通知



申請已提交

參考編號：EAD1508603000035314 | 提交日期及時間：21/06/2024 01:50

你的申請已提交。當處理完成後，我們會通知你。你亦可於「我的紀錄」查閱申請狀態。

返回主頁　　前往我的紀錄

積金易助理介面

選擇申請人身分和申請類別 > 選擇申請表 > 輸入申請人資料並提交

範例六: 為僱主轉移資金

- 選擇申請人身分（**僱主**）
- 點選相應的申請類別（**轉移資金**），然後點擊「**下一步**」

小貼士:

- 中介人請留意申請時限。

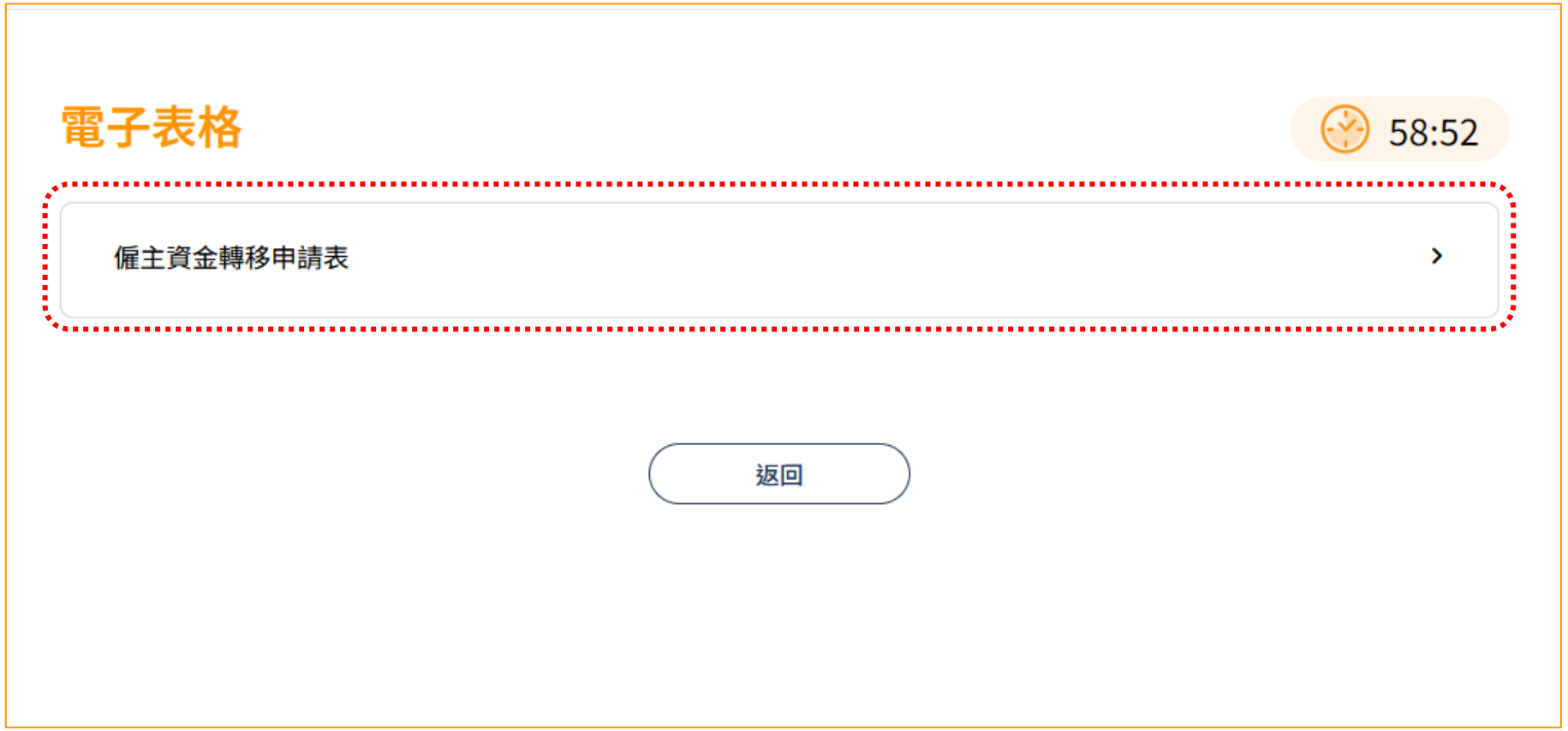


積金易助理介面

範例六: 為僱主轉移資金

選擇申請人身分和申請類別 | **選擇申請表** | 輸入申請人資料並提交

選擇**僱主資金轉移申請表**



積金易助理介面

範例六: 為僱主轉移資金

選擇申請人身分和申請類別 | **選擇申請表** | 輸入申請人資料並提交

選擇表格後，細閱重要資訊，然後按**確定**



積金易助理介面

範例六: 為僱主轉移資金

選擇申請人身分和申請類別 > 選擇申請表 > **輸入申請人資料並提交**

請輸入申請人的

1. **積金易號碼;**
2. **商業登記號碼** 及
3. **公司名稱**

然後點擊**下一步**



積金易助理介面

範例六: 為僱主轉移資金

僱主資金轉移申請表

所需資料:

A. 轉移類別
B. 現任僱主資料
C. 轉移資料
D. 授權及聲明

注意！

中介人只能在助理介面上為僱主提交**同一僱主**下的資金轉移。



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)

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]

P(E)

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。
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，請先細讀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. 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）只作參考而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、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。

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

A. TYPE OF TRANSFER 轉移類別

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。

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。)

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 [註 1]

("the Employer" 「僱主」)

範例六: 為僱主轉移資金

僱主資金轉移申請表

A. 轉移類別

B. 現任僱主資料

A. TYPE OF TRANSFER 轉移類別

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。

☑ 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。)

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** 註 1 HK International Corporation

("the Employer"「僱主」)

積金易助理介面

範例六: 為僱主轉移資金

僱主資金轉移申請表

B. 現任僱主資料

(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 | 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

(3) Name of Contact Person 聯絡人姓名

(4) Contact Details 聯絡資料

(i) Mobile Phone No. 手提電話號碼 (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，積金易平台不會透過此通訊途徑與貴公司聯絡。

(iv) Email Address 電郵地址 (If any 如有)

僱主資金轉移申請表

C. 轉移資料

C. TRANSFER INFORMATION 轉移資料

(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]

HK International Corporation

(ii) Name of Original Trustee ^ 原受託人名稱 ^

受託人A

(iii) Name of the Original Scheme ^ 原計劃名稱 ^

強積金計劃A

(iv) Employer Account No. [Note 4] of the Original Scheme 原計劃的僱主帳戶號碼 [註 4]

651448758

(v) Contributions to original scheme should be paid up to 向原計劃供款的最後日期

30/06/2024 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)

- [x] (i) Yes 是 (Please choose item (i) or (ii) below 請選擇下列項目 (i) 或 (ii))
  - [x] 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

範例六: 為僱主轉移資金

僱主資金轉移申請表

C. 轉移資料

(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。)

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 Siu Ming	A123****
2	Wong Tai Man	B654****
3	Lee Mei Ling	C789****
4		
5		
6		
7		
8		
9		
10		
11		
12		

(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 ^
受託人A

(ii) Name of the New Scheme ^ 新計劃名稱 ^
強積金計劃A

(iii) Employer Account No. [Note 4] of the New Scheme 新計劃的僱主帳戶號碼 [註 4]: 874681875

(iv) Effective Date of Transfer * 轉移開始生效日期 *: 01/07/2024 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. 如閣下／貴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。

僱主資金轉移申請表

D. 授權及聲明

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訛且無缺漏。

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
	DD 日 / MM 月 / YYYY 年

積金易助理介面

範例六: 為僱主轉移資金

僱主資金轉移申請表

中介人資料

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)

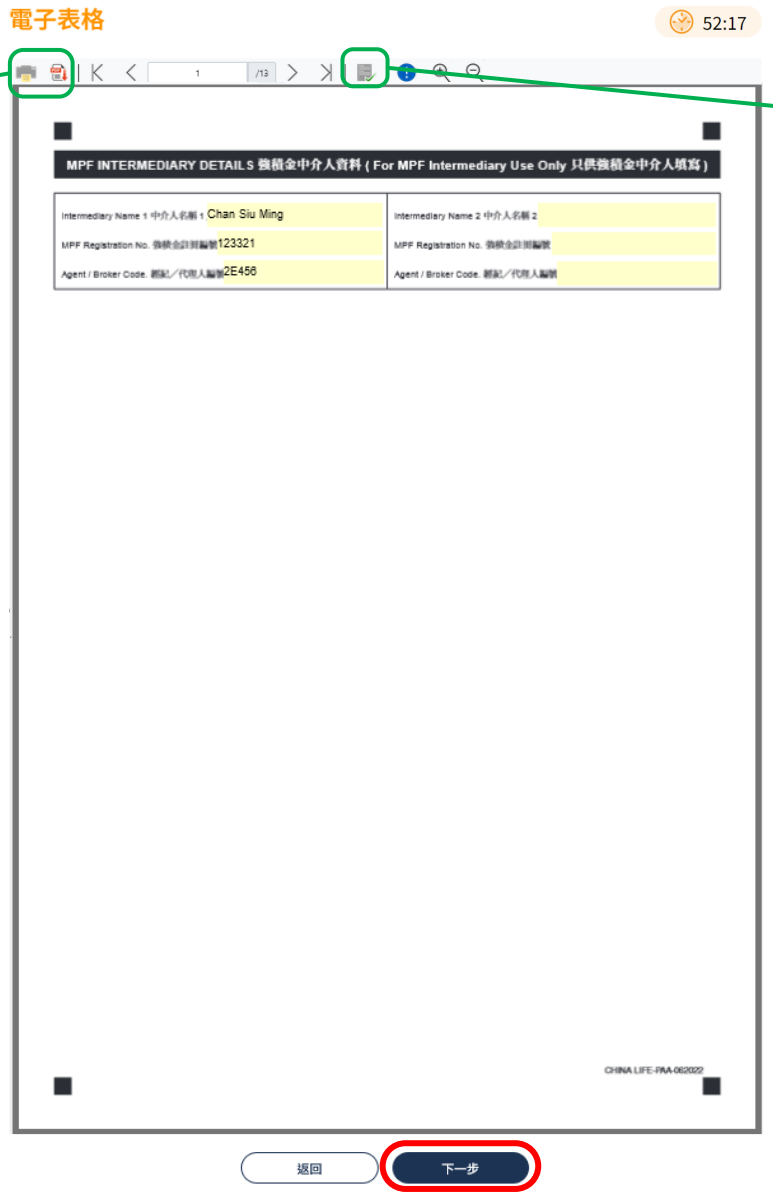
Intermediary Name 1 中介人名稱 1	Chan Tai Man	Intermediary Name 2 中介人名稱 2	
MPF Registration No. 強積金註冊編號	123321	MPF Registration No. 強積金註冊編號	
Agent / Broker Code. 經紀／代理人編號	2E456	Agent / Broker Code. 經紀／代理人編號	

積金易助理介面

範例六: 為僱主轉移資金

小貼士：

輸入完成後，中介人可點擊**列印**或**匯出PDF**來儲存表格副本



點擊**下一步**前，中介人可點擊**驗證**以查驗漏報卻又必需的資料

積金易助理介面

範例六: 為僱主轉移資金

選擇申請人身分和申請類別 > 選擇申請表 > **輸入申請人資料並提交**

細閱**條款及細則**後，到網頁底部按**「接受」**。



積金易助理介面

範例六: 為僱主轉移資金

選擇申請人身分和申請類別 > 選擇申請表 > **輸入申請人資料並提交**

成功遞交後，系統會顯示確認訊息

中介人亦會同時收到電子郵件／短訊通知



申請已發送

參考編號：EAD0008603000035462 | 提交日期及時間：21/06/2024 12:21

你預備的申請已發送至申請人供其查閱及確認提交。

返回主頁　準備其他申請

小貼士：

- 請提醒**僱主申請人**登入積金易平台及選擇**「待辦事項」**以核對並提交申請。

選擇申請人身分和申請類別 → 選擇受託人及計劃 → 輸入申請人資料 → 上載資料並提交

範例七: 為僱主提交供款／僱員資料

- 選擇申請人身分（**僱主**）
- 點選相應的申請類別（**提交僱員供款資料／加入僱員／終止僱員受僱**），然後點擊「**下一步**」

小貼士:

- 中介人請留意申請時限。



積金易助理介面

範例七: 為僱主提交資料

選擇申請人身分和申請類別 | **選擇受託人及計劃** | 輸入申請人資料 | 上載資料並提交

請選擇**受託人**和**計劃**，然後點擊**「下一步」**



積金易助理介面

範例七: 為僱主提交資料

選擇申請人身分和申請類別 > 選擇受託人及計劃 > **輸入申請人資料** > 上載資料並提交

請輸入申請人的

1. **積金易號碼** 及
2. **商業登記號碼**

然後點擊**下一步**



小貼士：

- 中介人可點擊**「下載範本」**，然後協助僱主輸入需要提交的資料，或發送給僱主，讓僱主填妥所需資料。

積金易助理介面

範例七: 為僱主提交資料

選擇申請人身分和申請類別 | 選擇受託人及計劃 | **輸入申請人資料** | 上載資料並提交

僱主資料範本（格式：Excel）

Version 0.3 版本0.3			
Description 描述	Termination data (Fill in only for terminated member status (T), leave blank for other member statuses) 終止受僱資料（僅填寫終止受僱成員狀態為（T），其他成員狀態則留		
	Conditional Mandatory 有條件下為必填項目 YYYYMMDD	Conditional Mandatory 有條件下為必填項目 Select from the dropdown list 從下拉清單中選擇	Conditional Mandatory 有條件下為必填項目 Select from the dropdown list / Blank 從下拉清單中選擇 / 留空
Data Example 例子	20121231	-	-
Data Field 資料欄位 User Remarks: Enter any comments or notes related to the row in column A. This information is for user reference only and will not be used for system validation or upload purposes. 使用者備註：在A列中輸入與該行相關的任何評論或備註。此資訊僅供使用者參考，不會用於系統驗證或上傳目的。	Last Date of Employment 最後受僱日期	Reason of Termination (For details, please refer to Termination of member table in "Note" tab) 離職理由 （詳細資訊請參閱「備註」標籤中的終止受僱成員表）	Long Service Payment/Severance Payment (For details, please refer to Termination of member table in "Note" tab) 長期服務金 / 遣散費 （詳細資訊請參閱「備註」標籤中的終止受僱成員表）
(Example for ordinary contribution scenario, this row is not being used. Please fill in your data in row 10) （普通供款情境範例，此行未使用，請在第10行填入您的資料）			

積金易助理介面

範例七: 為僱主提交資料

選擇申請人身分和申請類別 > 選擇受託人及計劃 > 輸入申請人資料 > **上載資料並提交**

上載填妥的僱員資料表格

然後點擊**下一步**



積金易助理介面

範例七: 為僱主提交資料

選擇申請人身分和申請類別 > 選擇受託人及計劃 > 輸入申請人資料 > **上載資料並提交**

滑動並細閱條款及細則，然後點擊**接受**



積金易助理介面

範例七: 為僱主提交資料

選擇申請人身分和申請類別 > 選擇受託人及計劃 > 輸入申請人資料 > **上載資料並提交**

- 成功遞交後，系統會顯示確認訊息
- 中介人亦會同時收到電子郵件或短訊通知



小貼士：

- 請提醒**僱主申請人**登入積金易平台及選擇**「待辦事項」**以核對並提交申請。



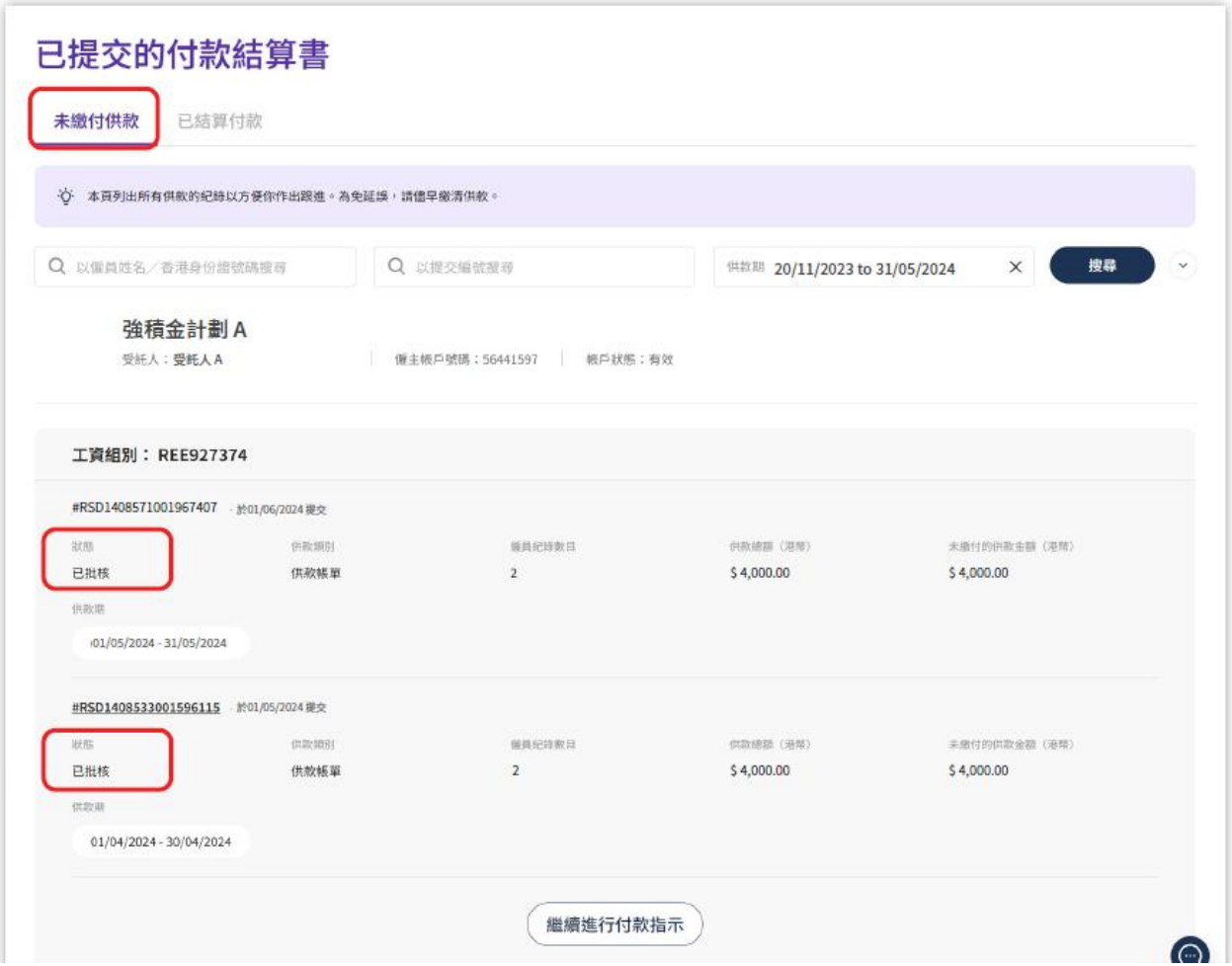
提交供款資料 (一般僱員)

已提交的付款結

選擇工資組別及供款期 > 提交供款資料 > 交予審批人批准 (如適用) > **支付供款**

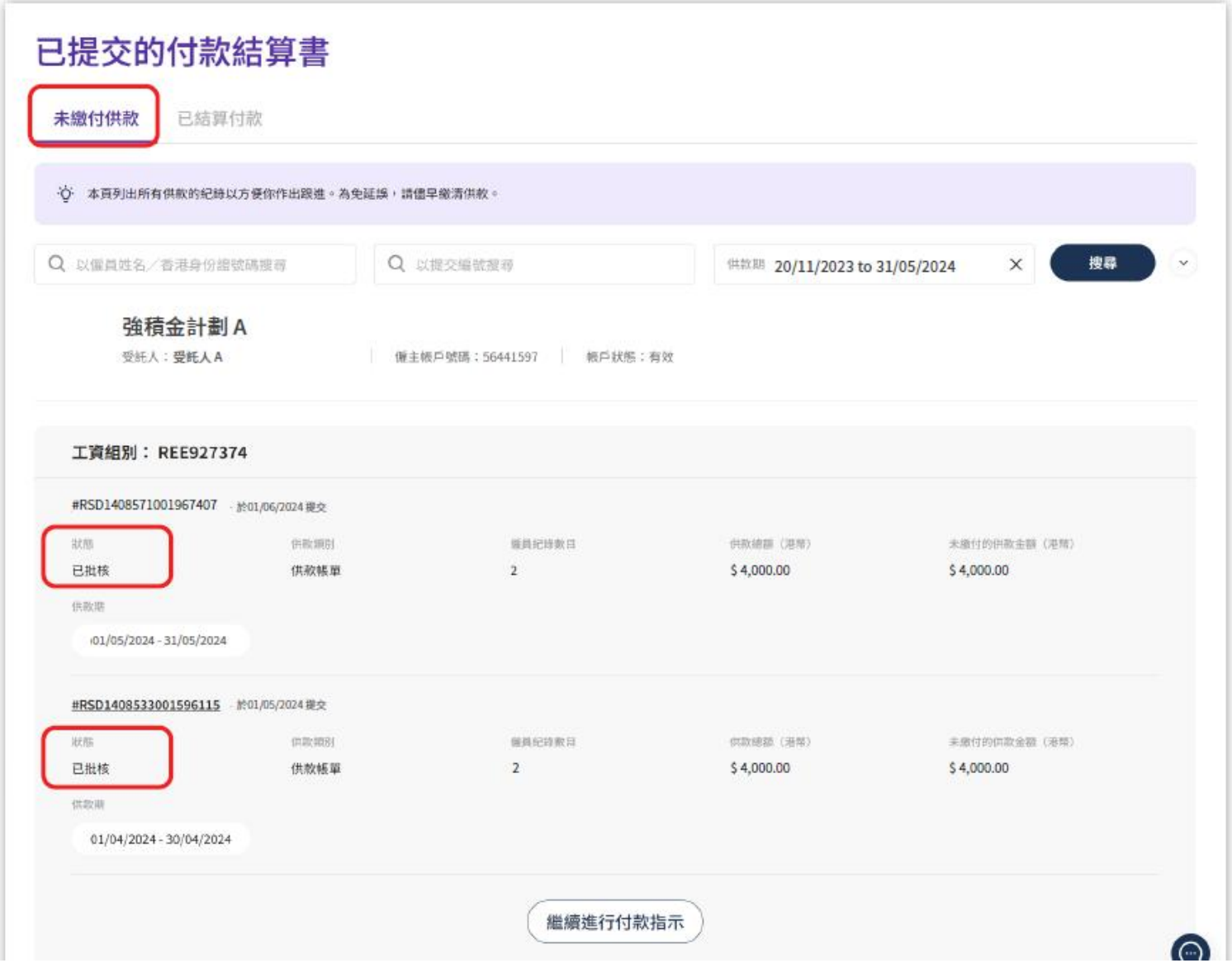
如僱主***並非使用直接付款授權供款**中介人可提醒僱主進行下列程序

僱主可在供款記錄中查看該工資組別下已提交的付款結算書詳情，然後按**「繼續進行付款指示」**



提交供款資料 (一般僱員)

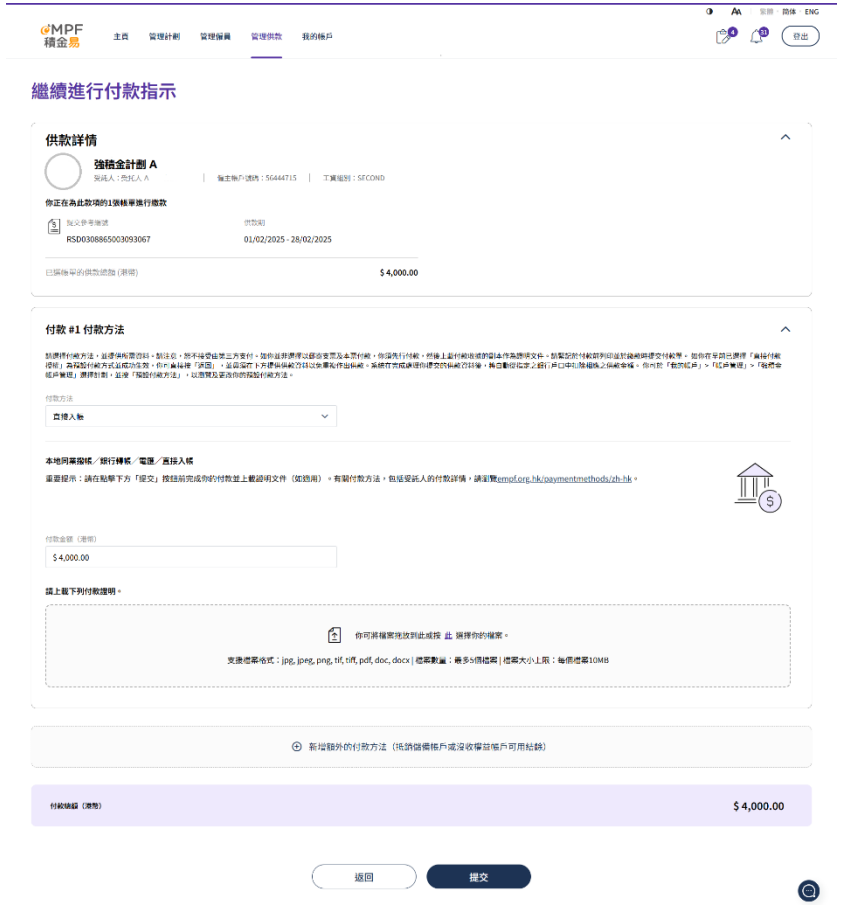
已提交的付款結算書.PNG



提交供款資料 (一般僱員)

選擇工資組別及供款期 > 提交供款資料 > 交予審批人批准 (如適用) > **支付供款**

僱主可以在**付款**的頁面中，選擇相關支付方法支付供款，然後按**「提交」**



注意！

積金易支援業界常見的付款方法如：**1. 直接扣帳（DDA）；2. 直接入帳；及 3. 支票**

同時支援其他付款方法但只限於特定計劃，有關選項會在僱主支付時顯示，中介人可協助並提醒客戶完成指示

提交供款資料 (一般僱員)

選擇工資組別及供款期 > 提交供款資料 > 交予審批人批准 (如適用) > **支付供款**

1. 直接入帳 （Direct Credit）

僱主可經直接入帳／本地同業撥帳／銀行轉帳／電匯直接向指定的強積金計劃的銀行帳戶付款。

僱主須於付款確認通知提供你的積金易平台「提交參考編號」或「強積金供款帳單號碼」*。
提交供款指示時，僱主需**上載付款確認通知**的螢幕截圖或相片上載作為證明文件。



*** 「提交參考編號」（即RSD+16位數字）和「僱主帳戶號碼」（8位數字）可在「管理供款」 > 「作出供款」中找到「強積金供款帳單號碼」（即BLD+16位數字）可在「（電子）付款結算書」找到。**

提交供款資料 (一般僱員)

選擇工資組別及供款期 > 提交供款資料 > 交予審批人批准 (如適用) > **支付供款**

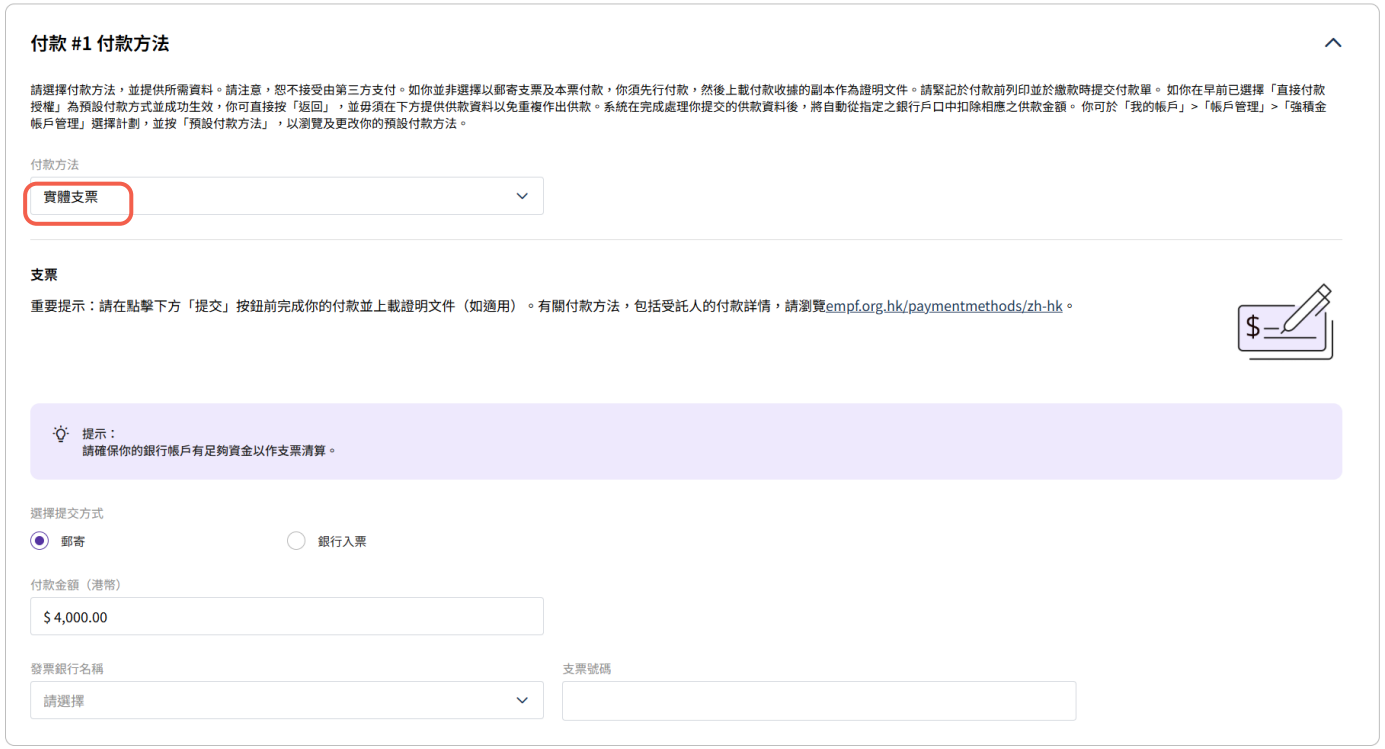
2. 支票

請預備劃線支票抬頭寫上相關強積金計劃的受託人收款人名稱。

請於支票背面寫上你的「強積金供款帳單號碼」、「提交參考編號」及「僱主帳戶號碼」*。

以下提供三個方法提交已備妥的支票：

1. **郵寄**：尖沙咀郵政局郵政信箱 98929 號
2. **投遞箱**：放到任何一間積金易服務中心的投遞箱。
3. **存支票機^**: 透過受託人指定的銀行存支票機入帳；提交供款指示時，把**付款確認通知**的相片上載於積金易平台作為證明文件。



^僅限部份強積金計劃，詳情可參考積金易網站

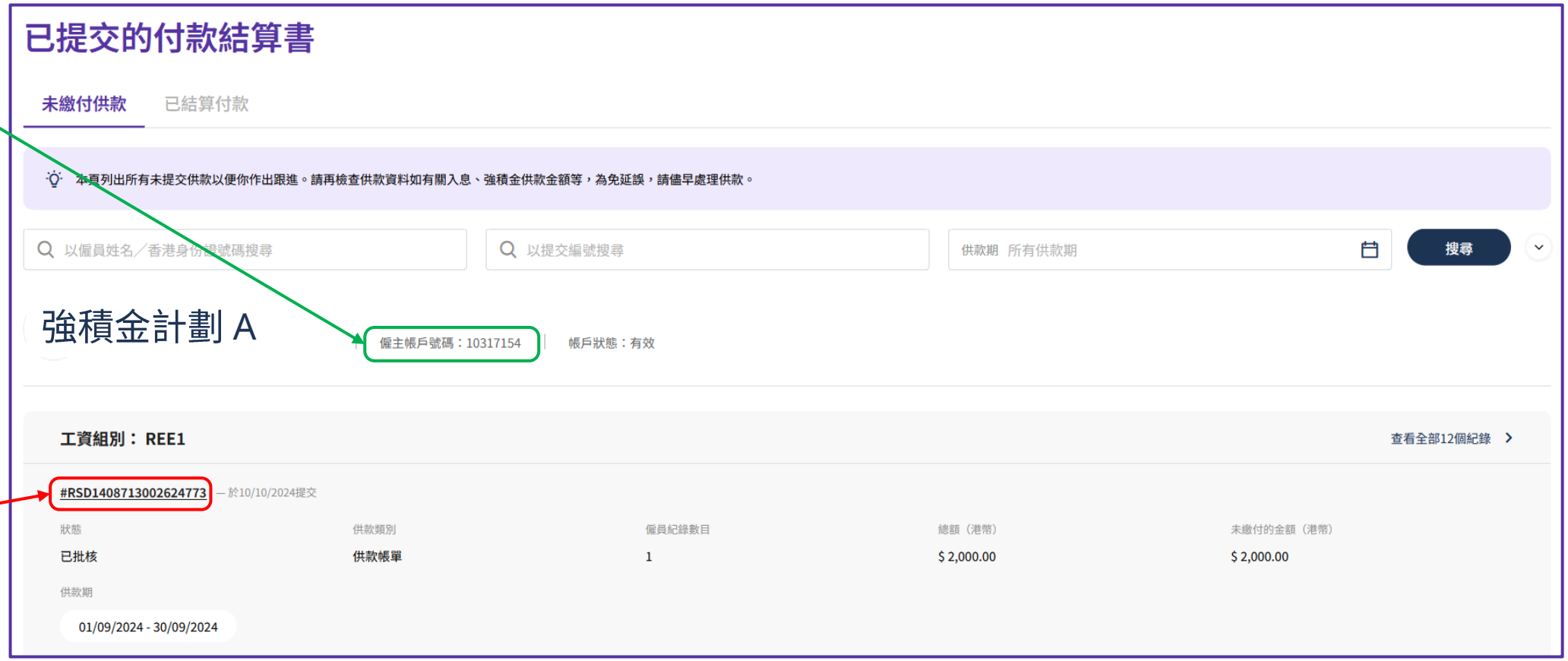
***「提交參考編號」（即RSD+16位數字）和「僱主帳戶號碼」（8位數字）可在「管理供款」>「作出供款」中找到「強積金供款帳單號碼」（即BLD+16位數字）可在「（電子）付款結算書」找到。**

提交供款資料 (一般僱員)

選擇工資組別及供款期 → 提交供款資料 → 交予審批人批准 (如適用) → **支付供款**

「僱主帳戶號碼」
(8位數字)

「提交參考編號」
(RSD+16位數字)



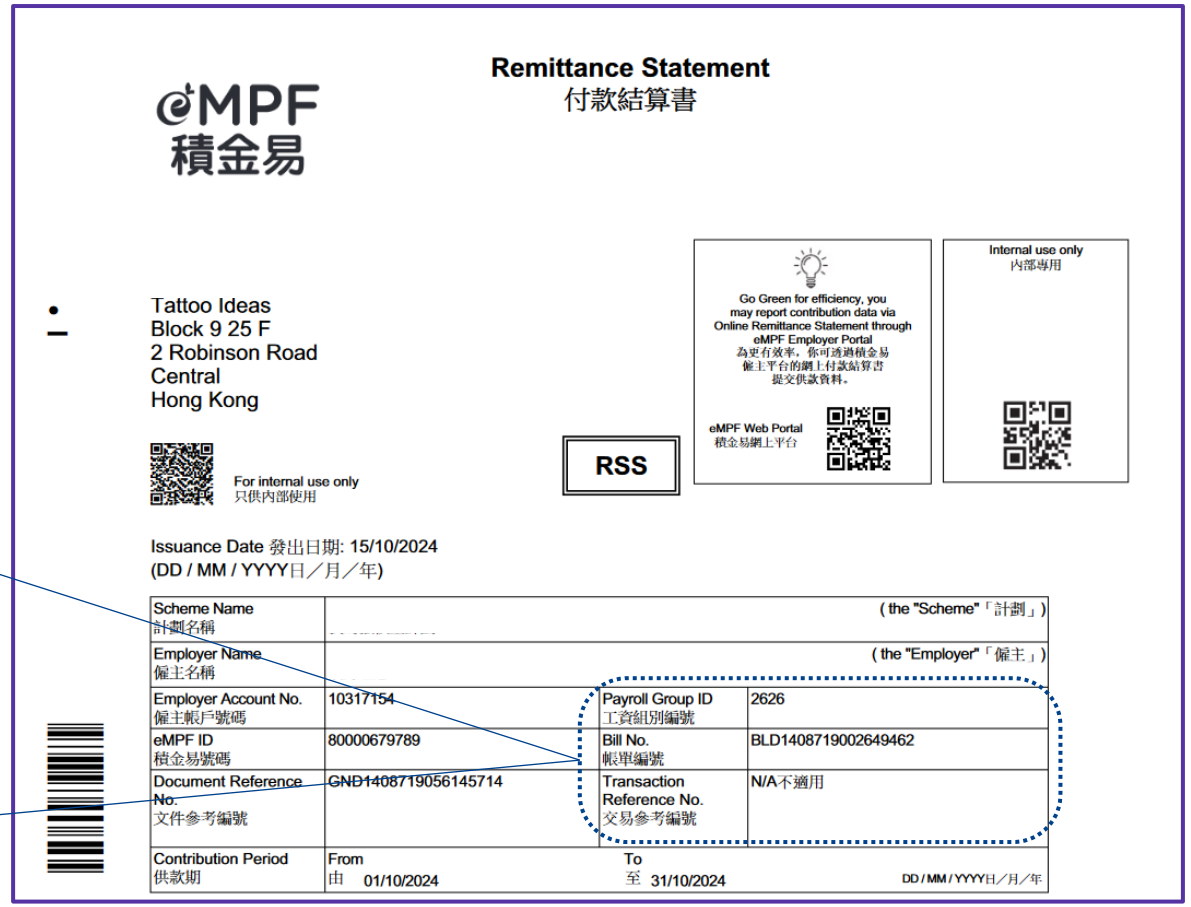
提交供款資料 (一般僱員)

選擇工資組別及供款期 → 提交供款資料 → 交予審批人批准 (如適用) → **支付供款**

僱主可前往**「我的帳戶」→「我的信件及報表」**獲取每月的**電子**編印付款結算書。

「強積金供款帳單號碼」
（即BLD+16位數字）

Payroll Group ID 工資組別編號	2626
Bill No. 帳單編號	BLD1408719002649462
Transaction Reference No. 交易參考編號	N/A不適用



eMPF 積金易

Remittance Statement
付款結算書

Tattoo Ideas
Block 9 25 F
2 Robinson Road
Central
Hong Kong

For internal use only
只供內部使用

RSS

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

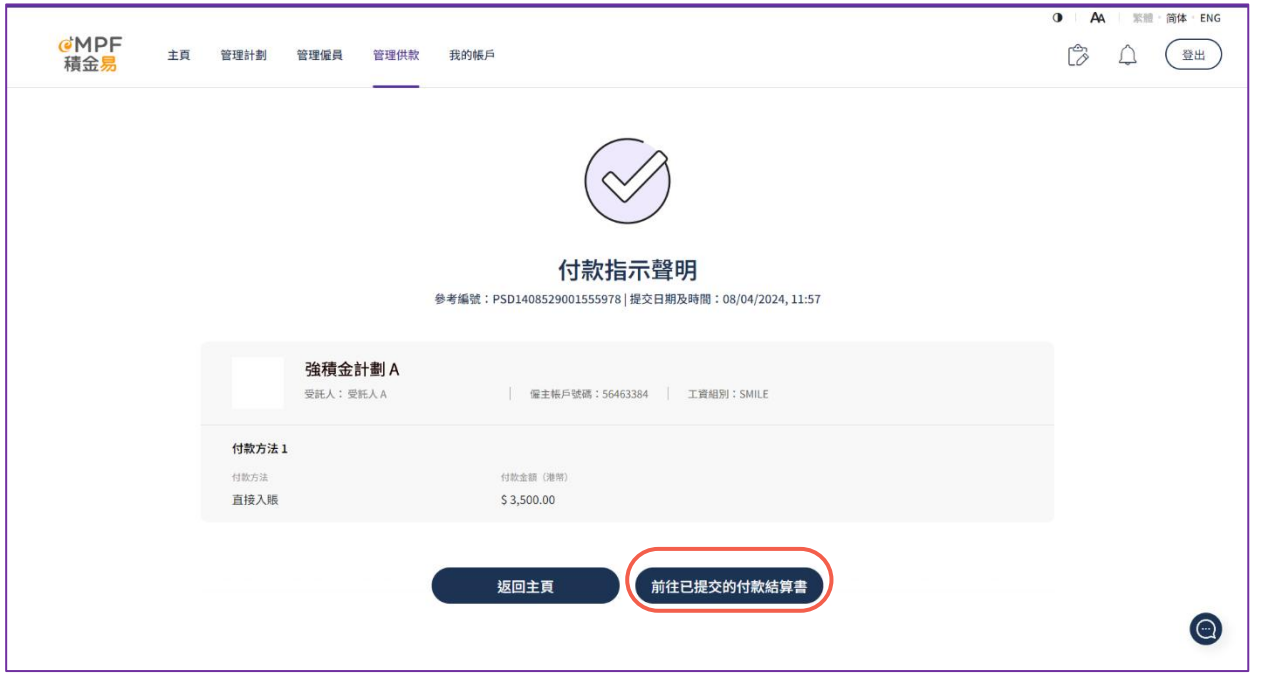
Issuance Date 發出日期: 15/10/2024
(DD / MM / YYYY日／月／年)

Scheme Name 計劃名稱			(the "Scheme"「計劃」)
Employer Name 僱主名稱			(the "Employer"「僱主」)
Employer Account No. 僱主帳戶號碼	10317154	Payroll Group ID 工資組別編號	2626
eMPF ID 積金易號碼	80000679789	Bill No. 帳單編號	BLD1408719002649462
Document Reference No. 文件參考編號	GND1408719056145714	Transaction Reference No. 交易參考編號	N/A不適用
Contribution Period 供款期	From 由 01/10/2024	To 至 31/10/2024	DD / MM / YYYY日／月／年

提交供款資料 (一般僱員)

選擇工資組別及供款期 > 提交供款資料 > 交予審批人批准 (如適用) > **支付供款**

成功提交付款聲明後，系統會顯示確認訊息



小貼士：

僱主可以立即在**「前往已提交的付款結算書」**中查看已結算的供款。銀行確認應收款項後，系統會更新供款狀態

相關的中介人操守要求

相關的中介人操守要求

- 《註冊中介人操守要求指引》（操守指引）為從事強積金銷售活動及提供意見的**中介人所須遵守的最基本操守標準**提供指導

中介人透過積金易為成員或僱主準備電子指示或為強積金事務提供協助時，操守指引下所有適用的規定及要求將繼續適用



常見問題

積金局會否因應實施積金易而修訂操守指引，更改某些中介人的合規及操守要求，例如豁免備存紀錄方面的要求？

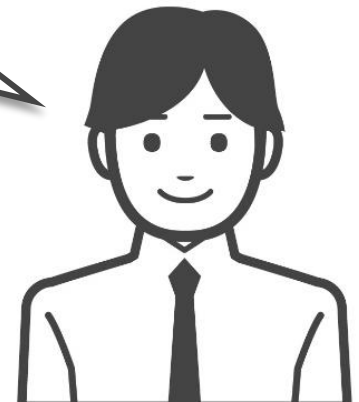




- 積金局已發布第3版的操守指引（於2024年6月26日生效）
- **主要為因應積金易的推出而修訂指引的行文用字：**

  例如第2版指引訂明，如客戶要求中介人把支票轉交受託人，中介人應迅速處理；第3版指引就上述要求的適用範圍已擴至涵蓋可作為支票收款人的平台營運者，以配合積金易的實施

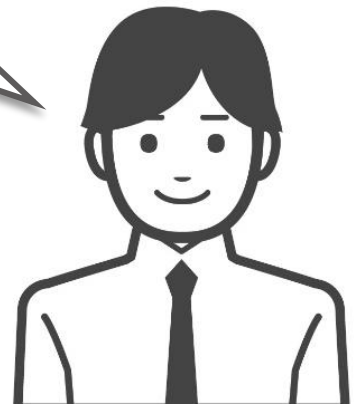
換言之，有關中介人規管的法例並無改變，中介人無論是以積金易或紙本方式進行銷售，仍須遵守強積金條例及操守指引下適用的要求及規定



請注意

平台並不會代中介人履行有關強積金條例及操守指引下適用的規定及要求

- 中介人在透過平台從事強積金銷售活動及提供意見時，須注意下列的要求及要點（僅供參考，並非詳盡無遺，中介人應按其情況建立及維持妥善的內部管控及程序）



主事中介人遵守法例的管控及程序

主事中介人**最低限度**須：

- 時刻備有充足資源及妥善的內部管控程序，使本身及其附屬中介人能夠遵守相關的法律及規管規定
- 向高級管理層（包括負責人員）提供管理資訊系統報告，並讓他們能夠及時取得所有與其業務有關的資訊（包括負責人員）

不論相關的強積金計劃是否已加入平台，中介人以電子或紙本方式進行銷售，仍須遵守強積金條例及操守指引下適用的要求及規定

強積金條例第34ZL(3)條及操守指引第III.61(a)及(u)段



主事中介人遵守法例的管控及程序(續)

主事中介人**最低限度**須：

- 訂立合規檢討及內部審核程序，以定期檢討和評估主事中介人的管控措施及程序的效益及效率

主事中介人須對積金易有充足及適時的認識，以便因應平台實施而作的適時檢討和評估，以及採取適當的跟進措施

操守指引第III.61(v)段



備存受規管活動的紀錄

- 中介人須把其向客戶披露 / 提供的資料及 / 或文件記錄在案，亦須記錄其給予客戶的受規管意見，包括提供有關意見的理據，並請客戶在文件上簽署以確認上述事項
- 文件副本必須交予客戶，而正本須由主事中介人保存最少七年

平台不會代中介人履行有關備存紀錄的合規及操守要求

強積金條例第34ZL(2)條及操守指引第III.58段



備存受規管活動的紀錄(續)

- **主事中介人須確保指引規定備存的所有錄音及書面紀錄均須保存最少七年**，包括但不限於有關需要特別照顧的客戶、適合性評估、風險配對、**中介人收取利益的客戶同意**的紀錄
- 紀錄可以電子形式儲存，但必須讓前線監督易於取覽，以便進行監管及查察

平台不會代中介人履行有關備存紀錄的合規及操守要求

操守指引第III.59段



就中介人收取利益而給予同意

- 中介人須在執行客戶的指示前或指示時取得**客戶的書面及明示同意**，才可收取金錢利益及非金錢利益
- 有關同意的紀錄須由主事中介人保存最少七年

操守指引第III.36A段



鑒於平台不會代中介人履行有關備存紀錄的合規及操守要求，中介人必須提供紀錄證明已適時取得客戶的書面及明示同意，並讓前線監督易於取覽，以便進行監管及查察

行事須誠實、公平、符合客戶的最佳利益及持正

- **積金易的登入憑證（例如積金易號碼、用戶名稱、密碼）只能由該用戶按積金易相關條款及規定登入平台，中介人不應要求客戶提供登入憑證以代他們登入平台**
- 中介人須確保提供的資料清晰正確、切勿以失實或誤導的陳述，容許、邀請或誘使任何客戶提供其登入憑證以代其登入平台

👍 在透過積金易為計劃成員或僱主準備申請前，中介人必須先與清楚客戶溝通，確保他們知悉及同意中介人的行動

強積金條例第34ZL(1)條及操守指引第III.2-3段



客戶資料保密的責任

- 中介人必須把客戶所提供的全部資料視作機密資料，除非在法例准許的情況下，否則不得披露或使用該等資料
- 中介人應避免不當地使用在業務活動過程中所取得的個人資料**（包括因註冊、使用或透過平台而獲得的客戶資料）**
- 處理客戶資料時，亦須遵守《強積金條例》第41條、《個人資料（私隱）條例》及私隱專員公署發出的相關指引



操守指引第III.10段

客戶資料保密的責任(續)



中介人以電子方式處理客戶的資料時必須小心謹慎，不應向非預定收件人披露客戶資料（例如透過電郵傳送客戶資料時，將資料或文件加密，並設定密碼及確保附件正確才發送）



中介人如使用平板電腦等電子裝置為客戶處理強積金事宜，應妥善保管該裝置及啟動密碼，禁止他人擅取裝置內的資料



謹慎、技巧及努力行事

- 中介人須**瞭解強積金制度**，並應時刻留意與強積金制度有關的發展**（包括積金易的實施及相關發展）**
- 中介人更須**對其推銷或提供意見的強積金計劃有良好的認識**（包括但不限於）：
  - 受託人及其服務提供者就計劃提供的服務範圍**（包括平台作為計劃管理人為經已轉移的計劃所提供的服務）**
  - 一般計劃運作事宜**（例如如何透過平台轉移強積金等）**

強積金條例第34ZL(1)(b)條及操守指引第III.13及III.15段



謹慎、技巧及努力行事(續)

- 中介人應知悉積金易是一個以非牟利的方式營運的公用設施，旨在一站式處理強積金計劃行政工作，達致標準化、精簡化和自動化，以提高運作效率及降低行政成本等好處
- **中介人應熟悉其銷售的強積金計劃及受託人加入積金易平台的時間表，與及相關行政及轉移安排**



中介人可善用積金易網站(empf.com.hk)上提供的資訊及資源（例如使用指南、教學影片、常見問題及解答、最新消息、公開文件和參考資料等）



迅速執行(續)

- 如必須使用實體支票或表格，中介人應迅速將有關支票及文件交到正確的地方，避免不必要的延誤



- **如向已加入平台的計劃作供款，支票應送交積金易服務中心，如計畫尚未加入平台，則供款支票應交予相關計劃的受託人**
- **無論計劃是否已加入平台，支票收款人仍是相關計劃的受託人**

迅速執行

- 中介人須迅速執行客戶指示，並在執行後通知客戶
- 如因事故延遲或未能執行指示， 須於合理時間內通知客戶
- **建議中介人在相關的強積金計畫加入積金易平台後，盡量使用平台以確保迅速完成客戶的指示**

操守指引第III.18段



就能力所及的事宜提供意見

- 附屬中介人不應就本身沒有足夠培訓、技巧及知識的事宜上提供意見（**包括如何妥善地使用平台，以及相關法規與運作等事宜**）
- 主事中介人須作出安排，評估其附屬中介人是否具備相關資歷、技巧及知識
- 主事中介人須提供足夠培訓以確保其附屬中介人：
  - 熟悉銷售程序及相關的管控措施
  - 知悉所需遵守的相關法定及規管規定

    （**包括與積金易有關的轉變及修訂**）



強積金條例第34ZL(1)(c)條及操守指引第III.22-24段

就能力所及的事宜提供意見(續)

- **主事中介人應適時安排附屬中介人適時參加有關積金易的培訓活動，以確保他們掌握所需的知識和技巧，然後才進行相關受規管活動及提供意見**
- 積金局已於2024年4月完成為業界舉辦的簡介會（內容包括有關積金易的簡介），持續專業進修活動提供者已由2024年6月開始推出有關課程
- **積金易外展隊將會陸續為中介人提供有關積金易的持續專業進修核心活動**



有關積金易的持續專業進修培訓

培訓	訓練內容
首階段的主要內容包括積金易簡介、積金易成員平台及僱主平台 （2小時持續專業進修核心活動）	- 簡介積金易平台及積金易助理介面 - 積金易成員平台及僱主平台的主要功能
次階段的主要內容包括積金易助理介面及相關的操守要求 （2小時持續專業進修核心活動）	- 介紹積金易助理介面的功能 - 相關的中介人操守要求

附屬中介人須於2025年年底前完成以上有關積金易的持續專業進修核心活動（合共四小時）

有關操守要求的總結

- 為確保強積金條例及操守指引的規定得到遵從，主事中介人、其負責人員及合規人員有責任訂立及維持妥善的管控措施及程序（包括因平台實施而作出的檢討和修訂）
- 主事中介人應與其附屬中介人充分溝通，向他們說明如何透過平台妥善地進行強積金業務（例如發出適當及更新的指引、標準及程序）
- **主事中介人應就積金易帶來的轉變及新工作模式為附屬中介人提供合適的培訓及資訊**



積金易提交指示途徑

網上提交指示
(*建議使用網上提交指示)



積金易
網上平台



積金易
流動應用程式

提交強積金行政表格的指定途徑
(強積金行政表格可於積金易網站下載*)



電郵地址

(forms@support.empf.org.hk)



傳真

(3197 2988)



郵寄

(地址: 尖沙咀郵政局
郵政信箱 98929 號)



任何一間積金易服務中心的投遞箱

積金易提供全方位的支援服務

自助資訊





網上平台/流動應用程式
用戶指南



網上平台/流動應用程式
教學短片



積金易常見問題

客戶支援





在線支援



客戶服務熱線



積金易服務中心



積金易外展隊

客戶查詢

客戶查詢途徑	詳情	服務時間
積金易客戶服務熱線	183 2622	服務時間: 星期一至五: 上午9時至下午7時 星期六: 上午9時至下午1時 (星期日及公眾假期除外)
電郵地址	enquiry@support.empf.org.hk	
傳真	3197 2922	
積金易服務中心	**香港島** 香港灣仔皇后大道東248號大新金融中心6樓601B室 **九龍** 九龍尖沙咀東部麼地道77號華懋廣場12樓1205-6室 **新界** 新界荃灣楊屋道8號如心廣場第2座18樓1802A室	開放時間: 星期一至五: 上午9時至下午6時 星期六: 上午9時至下午1時 (星期日及公眾假期除外)
自助服務	設於承辦商的12間電訊服務門市	視乎門市的營業時間

結語

- 積金易助理介面容許中介人為僱主和成員提交表格和上載文件，提供便利服務，能省卻僱主、成員填寫指示的時間。

- 積金易助理介面內包含不同受託人公司的表格， 中介人可一站式內遞交多份文件，方便隨時隨地處理多項指示。

