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**MPF**

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**GUIDE TO TRANSFER BENEFITS UNDER EMPLOYEE CHOICE ARRANGEMENT (“ECA”)  
(For employee to transfer accrued benefits from contribution account in an original scheme to an  
account in a new scheme nominated by the employee during employment)**

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Please read the following important information before you complete Form MPF(S)-P(P).

**Definition of terms used in this Guide:**

- (a) “Contribution account” – an account in an MPF scheme which is mainly used to receive MPF contributions (both employer and employee portions) made by an employer for an employee and on behalf of the employee. Contribution account may also include an account of a self-employed person in the new scheme which is mainly used to receive MPF contributions made by himself while self-employed.
- (b) “Personal account” – an account in an MPF scheme which is mainly used to receive the accrued benefits transferred from another account(s).
- (c) “Original trustee” (also known as “transferor trustee” in the Mandatory Provident Fund Schemes (General) Regulation (“the Regulation”)) – the trustee of an MPF scheme from which your accrued benefits are to be transferred.
- (d) “New trustee” (also known as “transferee trustee” in the Regulation) – the trustee of an MPF scheme to which your accrued benefits are to be transferred. If you elect to transfer your accrued benefits to another account within the same MPF scheme or to another MPF scheme under the same trustee, the new trustee on Form MPF(S)-P(P) will be the same as the original trustee.
- (e) “Original scheme” – the MPF scheme from which your accrued benefits are to be transferred.
- (f) “New scheme” – the MPF scheme to which your accrued benefits are to be transferred. If you elect to transfer your accrued benefits to another account within the same MPF scheme, the new scheme on Form MPF(S)-P(P) will be the same as the original scheme.
- (g) “Calendar year” – the one-year period from 1 January to 31 December.

**Introduction**

- (1) The Mandatory Provident Fund Schemes (Amendment) Ordinance 2009 (“the Amendment Ordinance 2009”) enacted by the Legislative Council in July 2009 empowers employees to transfer part of the accrued benefits from their contribution accounts to **the accounts nominated by them in any MPF scheme during employment** (“Employee Choice Arrangement”).
- (2) Under the MPF System, an employer is responsible for choosing the MPF scheme(s) for its employees and making contributions for and on behalf of its employees to the scheme(s), whilst an employee is responsible for choosing the fund(s) under the scheme(s) to invest in.
- (3) An employer makes the contributions (both employer and employee portions) for and on behalf of an employee to the employee’s contribution account. The accumulated balance of contributions and investment returns is referred to as “**accrued benefits**”.
- (4) Before the implementation of the Employee Choice Arrangement, if an employee wishes to choose his own MPF scheme, he can only make an election when he ceased or changed employment usually by electing to transfer the accrued benefits from his contribution account to the following account:
  - (a) a preserved account (this account is renamed to “personal account” after the implementation of the Employee Choice Arrangement) in any MPF scheme (excluding employer sponsored scheme); or
  - (b) a contribution account of his new employer’s MPF scheme.

**New right to employees**

- (5) Under the Employee Choice Arrangement, an employee can, **during employment**, make an election to transfer part of the accrued benefits from a contribution account in an original scheme to an account in a new scheme nominated by him.
- (6) The table below shows the three sub-accounts keeping the mandatory contributions in a contribution account and the transferability of the accrued benefits from each of these sub-accounts **during an employee’s current employment** before and after the implementation of the Employee Choice Arrangement.

Sub-accounts in an employee's contribution account	Before	After
ERMC	Not transferable	Not transferable
EEMC	Not transferable	Transferable to an MPF personal account <b>once per calendar year</b> <sup>1</sup>
FRMC	Not transferable	Transferable to an MPF personal account or contribution account anytime

*ERMC: Employer mandatory contributions in current employment*

*EEMC: Employee mandatory contributions in current employment*

*FRMC: Mandatory contributions from former employment(s)*

- (7) The transferability of accrued benefits derived from **voluntary contributions** is subject to the governing rules of the original scheme. Please check this information from the offering documents of your original scheme; or consult your employer or original trustee.
- (8) You can **check the balances of the accrued benefits in your contribution account and its sub-accounts** by any of the following means:
- the latest annual benefit statement issued by the original trustee;
  - the member enquiry facilities made available by the original trustee (e.g. hotline); or
  - directly consulting the original trustee (the contact lists of MPF trustees and MPF schemes are available at the office of the Mandatory Provident Fund Schemes Authority ("MPFA") and on its website ([www.mpfa.org.hk](http://www.mpfa.org.hk))).

#### **Should I make an election to transfer my accrued benefits?**

- (9) Before you decide to transfer your accrued benefits to another scheme, you should take into consideration the following factors:
- services of the trustees (e.g. frequency of issuance of benefit statement to members; number of free fund switching per year);
  - fees and charges of the funds (for detailed information, please refer to the Fee Comparative Platform on the website of the MPFA or the Summary of Fee Comparative Platform on MPF Funds which can be obtained from the office of the MPFA free of charge);
  - the range of fund choices offered by the schemes and in particular whether there are funds available that match what you need; and
  - if you are currently investing in an MPF guaranteed fund, a transfer of the accrued benefits out of that guaranteed fund may result in some or all of the guarantee conditions not being satisfied; thus affecting your entitlement to the guarantee. Please check the offering document of the original scheme or consult your original trustee for details.
- (10) For further information about factors to consider when choosing a scheme, please refer to the MPFA's relevant investment education publications or visit the MPFA's website.
- (11) Before deciding to transfer benefits to a new scheme, you should try to understand as much as you can about the new scheme. The best source of information about the new scheme is in its offering document. Copies of that offering document can be obtained from the new trustee upon request.
- (12) You should seriously consider all the implications before making any election to transfer your accrued benefits. Your MPF investments are a long-term investment. You should not view a transfer as an opportunity to time the market. A transfer of accrued benefits will always be subject to investment risk due to market fluctuation during the process as the transfer will normally take **around 6 to 8 weeks** to complete. You are also advised not to make the transfer solely because of the trustees' promotional offer.
- (13) You might receive advice or inducements from an MPF intermediary<sup>2</sup> who would encourage you to join a new scheme. If you are in doubt about the registration status of an MPF intermediary, you may call the MPFA's hotline (tel.: 2918 0102) or check the register of MPF intermediaries available on the MPFA's website. You should also think through any advice you receive and in particular whether it addresses the factors set out in paragraphs (9) and (12) above.

<sup>1</sup> Unless the governing rules of the original scheme provide for more frequent transfer out.

<sup>2</sup> MPF intermediary means a person who is engaged in selling MPF schemes; or advising clients on constituent funds or underlying approved pooled investment funds of MPF schemes.

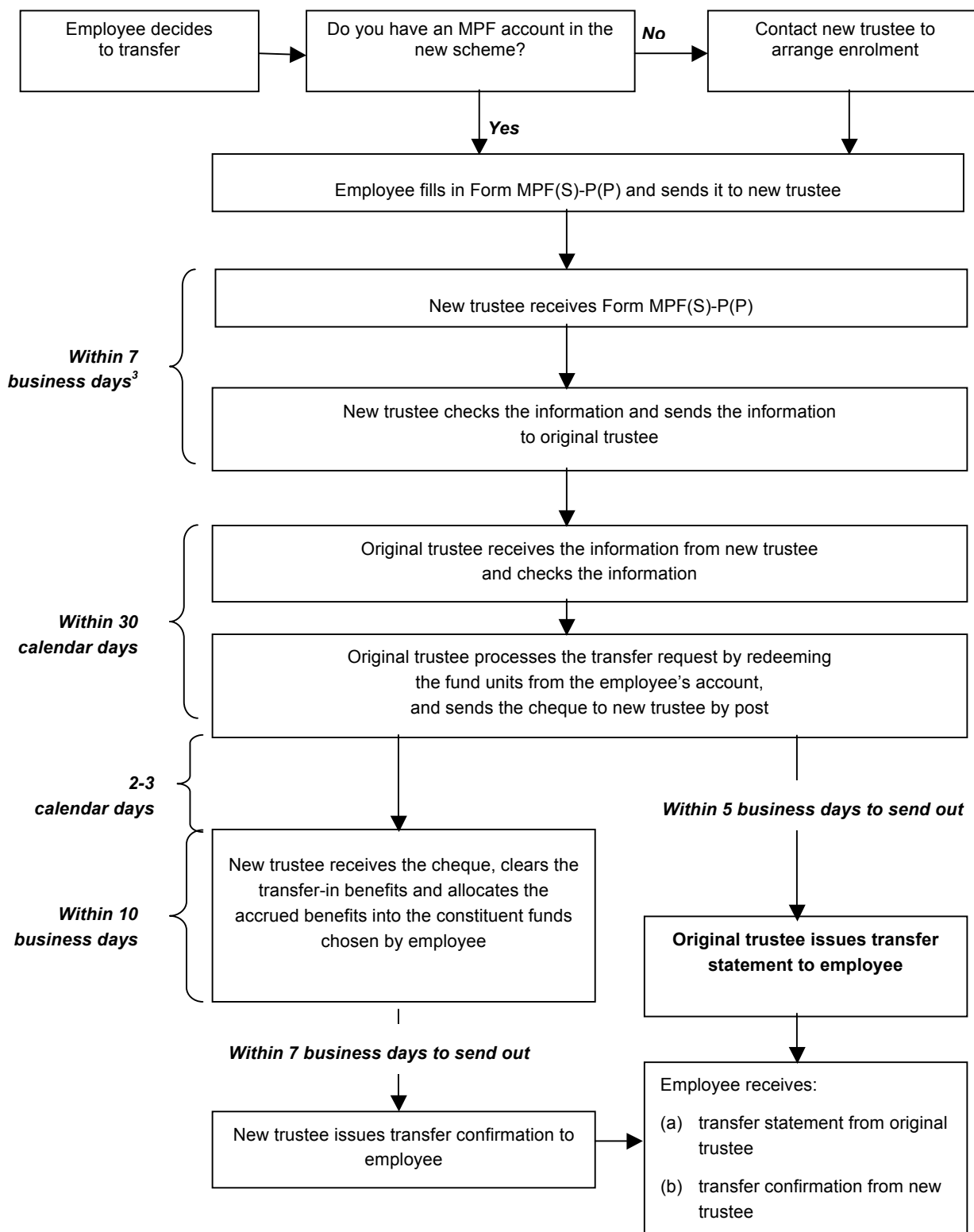
## How to make an election to transfer?

- (14) If you have made the decision to transfer your accrued benefits to another MPF scheme, please check whether you have an MPF account in the new scheme. If you:
- (a) **already have an MPF account** in the new scheme, you should fill in the "Employee Choice Arrangement ("ECA") – Transfer Election Form" (Form MPF(S)-P(P)) and submit it to the new trustee; or
  - (b) **have not opened an MPF account** in the new scheme, please contact the new trustee to arrange enrolment for you before or at the time when you submit Form MPF(S)-P(P) to the new trustee.

You can obtain Form MPF(S)-P(P) from the new trustee or the MPFA.

- (15) Please note that the accrued benefits derived from your employee mandatory contributions (and if applicable, employee voluntary contributions) during employment can be transferred to **an MPF personal account** only. They cannot be transferred to another contribution account, which would normally exist if you are concurrently working for more than one employer.
- (16) Please complete Form MPF(S)-P(P) carefully. If any information provided on Form MPF(S)-P(P) (including the signature) is incorrect or incomplete, the trustees may not be able to process the transfer request. In addition, please **DO NOT sign on a blank form** to prevent a third party from filling in incorrect information on it as the administration procedures taken by the trustees may not be reversible.
- (17) After completing Form MPF(S)-P(P), you should submit it to the new trustee for processing. The normal processing time of transfer is around 6 to 8 weeks. Please refer to the flow chart at page iv below for the benefits transfer process.
- (18) You should not submit a transfer request whilst another previously submitted request is still being processed. Otherwise, your transfer request may not be properly processed.
- (19) As the normal processing time of transfer is around 6 to 8 weeks, the number of fund units shown in your current MPF account on the date you elect to transfer may be different from that as of the date on which the fund units are redeemed. The original trustee will redeem all the fund units in the sub-account(s) you elect to transfer out on the date of redemption and transfer out the redeemed benefits.
- (20) According to the Amendment Ordinance 2009, you can only elect to transfer out the accrued benefits derived from your employee mandatory contributions once per calendar year (unless the governing rules of the original scheme provide for more frequent transfer out). **The date the new trustee receives the properly completed election form is adopted for counting that quota.** You may check that date from the transfer statement issued by your original trustee, or directly consult your original trustee.
- (21) After your accrued benefits are transferred out from the original scheme, future contributions made by your existing employer (both employer and employee portions) for and on behalf of you will continue to be made to your contribution account with the original trustee. If you want to transfer the benefits derived from the subsequent employee mandatory contributions to your new account in the new scheme, you should make a separate transfer election in the next calendar year (or earlier if the governing rules of the original scheme allow for more frequent transfer out in a calendar year).
- (22) If you wish to make enquiries or seek assistance in making your election to transfer, please contact your original trustee or new trustee. For general enquiries regarding the Employee Choice Arrangement, you may contact the MPFA via email: [mpfa@mpfa.org.hk](mailto:mpfa@mpfa.org.hk) or hotline: 2918 0102.
- (23) Please complete Form MPF(S)-P(P) at Page 1 to Page 3 and submit it (excluding the Explanatory Notes) to the new trustee after completion.

### Flow Chart of Benefits Transfer Process



~End~

<sup>3</sup> "Business day" means any day other than a Saturday, a public holiday, a gale warning day and a black rainstorm warning day.

## 「僱員自選安排」權益轉移指南 (適用於僱員在現職期間把原計劃供款賬戶內的累算權益轉移至其自選新計劃的賬戶)

填寫第 MPF(S)-P(P) 號表格前，請先閱讀下列重要資料：

本指南的用詞定義：

- (a) 「供款賬戶」一指強積金計劃下主要用以接收僱主為僱員所作出以及代表僱員所作出的強積金供款（包括僱主及僱員部分）的賬戶。供款賬戶亦包括自僱人士在新計劃下主要用以接收其在自僱期間所作出的強積金供款的賬戶。
- (b) 「個人賬戶」一指強積金計劃下主要用以接收由另一賬戶轉入的累算權益的賬戶。
- (c) 「原受託人」（在《強制性公積金計劃（一般）規例》（簡稱《規例》）中亦稱「轉移受託人」）一指轉出你的累算權益的強積金計劃的受託人。
- (d) 「新受託人」（在《規例》中亦稱「承轉受託人」）一指轉入你的累算權益的強積金計劃的受託人。如你選擇將累算權益轉移至同一強積金計劃的另一個賬戶或轉移至同一受託人的另一個強積金計劃，第 MPF(S)-P(P) 號表格所述的新受託人將與原受託人相同。
- (e) 「原計劃」一指轉出你的累算權益的強積金計劃。
- (f) 「新計劃」一指轉入你的累算權益的強積金計劃。如你選擇將累算權益轉移至同一強積金計劃的另一個賬戶，第 MPF(S)-P(P) 號表格所述的新計劃將與原計劃相同。
- (g) 「公曆年」一指由 1 月 1 日至 12 月 31 日的一年期間。

### 引言

- (1) 立法會於 2009 年 7 月制定《2009 年強制性公積金計劃（修訂）條例》（簡稱《2009 年修訂條例》），容許僱員在現職期間把供款賬戶內的部分累算權益，轉移至他們所指定的**任何強積金計劃下的賬戶**（簡稱「僱員自選安排」）。
- (2) 在強積金制度下，僱主負責為僱員選擇強積金計劃，並為僱員以及代表僱員向計劃作出供款，僱員則負責從該計劃中選擇基金進行投資。
- (3) 僱主須為僱員以及代表僱員向僱員的供款賬戶作出供款（包括僱主及僱員部分）。該等供款及相關投資回報所滾存的結餘稱為「**累算權益**」。
- (4) 「僱員自選安排」實施前，如僱員想自選強積金計劃，只可在終止受僱或轉職時作出選擇。一般做法是把累算權益從供款賬戶轉移至以下之賬戶：
  - (a) 任何強積金計劃（但不包括僱主營辦計劃）的保留賬戶（「僱員自選安排」實施後，保留賬戶將改稱為「個人賬戶」）；或
  - (b) 新僱主所選強積金計劃的供款賬戶。

### 僱員可享的新權利

- (5) 在「僱員自選安排」下，僱員可在**受僱期間**，選擇把原計劃供款賬戶內的部分累算權益轉移至其自選新計劃的賬戶。
- (6) 有關供款賬戶內用作存放強制性供款的 3 個分賬戶，以及在實施「僱員自選安排」前後，各分賬戶內的累算權益於**僱員現職期間**可作轉移的情況，可見下表作參考。

僱員供款賬戶內的分賬戶	「僱員自選安排」實施前	「僱員自選安排」實施後
現職期間的僱主強制性供款	不可轉移	不可轉移
現職期間的僱員強制性供款	不可轉移	可 <b>每公曆年一次</b> <sup>1</sup> 轉出至強積金個人賬戶
以往的受僱工作的強制性供款	不可轉移	可隨時轉出至強積金個人賬戶或供款賬戶

<sup>1</sup> 如原計劃的管限規則訂明可多次轉移權益，則不在此限。

- (7) 至於**自願性供款**所產生的累算權益可作轉移的情況，則視乎原計劃的管限規則而定。有關規則的詳情，請查閱原計劃的要約文件，或向僱主或原受託人查詢。
- (8) 你可透過下列方法，**查閱供款賬戶及其分賬戶的累算權益結餘**：
- (a) 原受託人發出的最新周年權益報表；
  - (b) 原受託人為成員提供的查詢服務（例如查詢熱線）；或
  - (c) 直接向原受託人查詢（可親臨強制性公積金計劃管理局（簡稱「積金局」）辦事處或登入積金局網頁（[www.mpfa.org.hk](http://www.mpfa.org.hk)）查閱強積金受託人及強積金計劃的聯絡資料）。

### 我應否作出轉移累算權益的選擇？

- (9) 在你決定將累算權益轉移至另一計劃前，你應考慮以下因素：
- (a) 受託人的服務（例如向成員發出權益報表的頻密程度及每年可免費轉換基金的次數）；
  - (b) 基金的收費（詳情請參閱積金局網站的收費比較平台，或可於積金局辦事處免費索取「強積金基金收費比較平台摘要」）；
  - (c) 計劃所提供的基金選擇範圍，尤須注意計劃有否提供切合你需要的基金選擇；及
  - (d) 如你現時投資於強積金保證基金，則從該保證基金轉出累算權益可能導致你不符合部分或所有保證條件，從而影響你享有保證的資格。有關詳情請查閱原計劃的要約文件或向原受託人查詢。
- (10) 有關選擇計劃時各項考慮因素的詳細資料，請參閱積金局的相關投資教育刊物或瀏覽積金局網頁。
- (11) 在決定把權益轉移至新計劃前，你應盡量瞭解新計劃的內容。要獲知有關資料，最佳途徑是參閱新計劃的要約文件。你可向新受託人要求索閱有關要約文件。
- (12) 在選擇轉移累算權益前，應再三考慮有關決定的所有影響。強積金是長線投資，你不應因為捕捉市況而轉移權益。由於轉移權益的程序一般需時約**6至8星期**完成，因此在轉移累算權益時，通常須承受在轉移過程中由於市場波動而帶來的投資風險。此外，你亦不應純粹因受託人的推廣優惠而轉移權益。
- (13) 強積金中介人<sup>2</sup>或會向你提供意見或優惠，鼓勵你參加新計劃。假如你對強積金中介人的註冊身份有懷疑，可致電積金局熱線電話 2918 0102 查詢，或登入積金局網站查閱強積金中介人的紀錄冊。此外，你應仔細考慮所獲取的意見，特別是該等意見有否提及上文第(9)和第(12)段所述的因素。

### 如何作出轉移權益的選擇？

- (14) 如你已作出決定，選擇將累算權益轉移至另一強積金計劃，請先查明你在新計劃是否已持有強積金賬戶。如在新計劃：
- (a) **已持有**強積金賬戶，便應填寫《「僱員自選安排」—轉移選擇表格》（第 MPF(S)-P(P) 號表格），並交回新受託人；或
  - (b) **仍未開立**強積金賬戶，請於向新受託人提交第 MPF(S)-P(P) 號表格的時候或之前，聯絡新受託人安排參加新計劃。

有關第 MPF(S)-P(P) 號表格，可向新受託人或積金局索取。

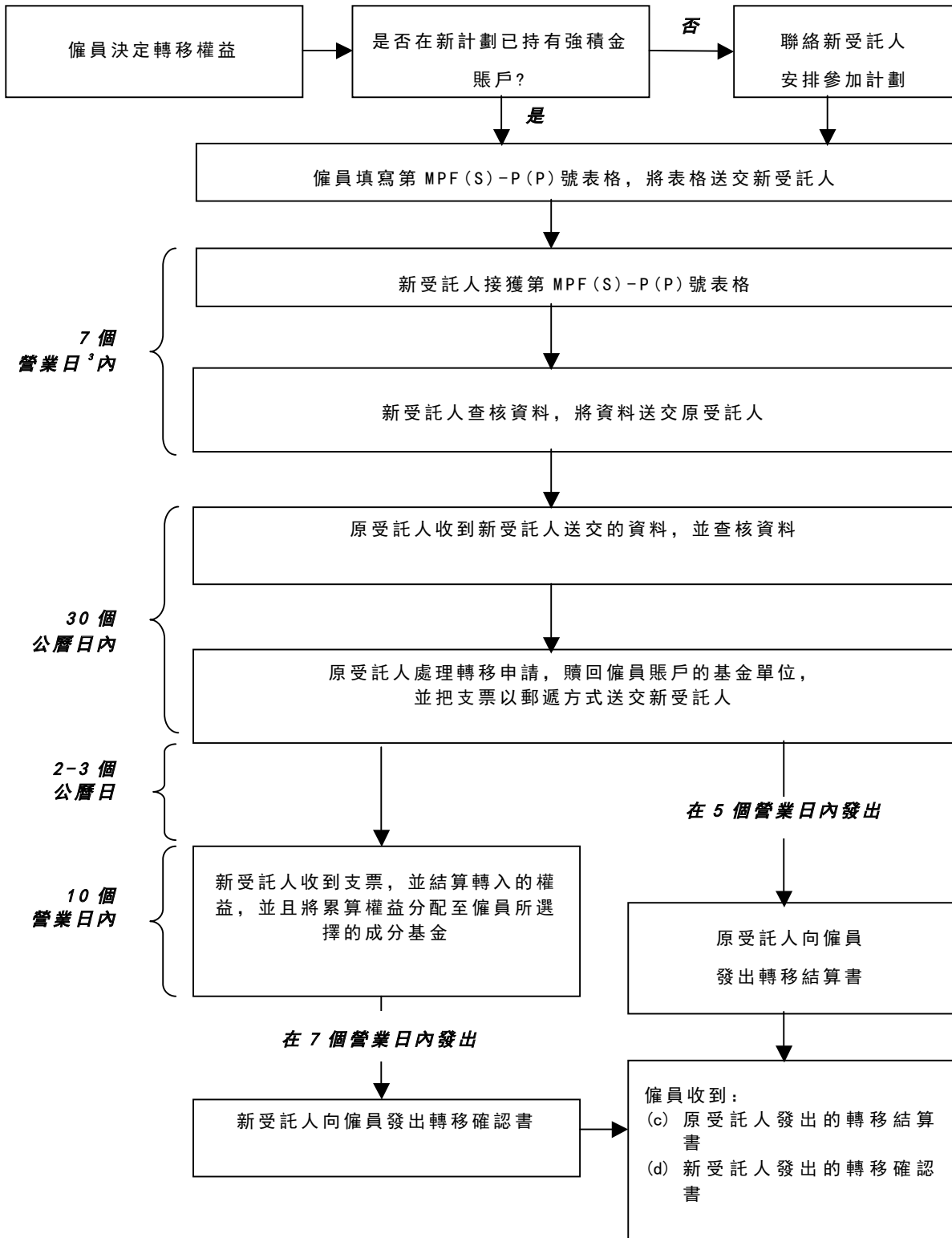
- (15) 請注意，你在現職期間所作出的僱員強制性供款（在適用情況下亦包括僱員自願性供款）所產生的累算權益只可轉移至**強積金個人賬戶**，不可轉移至其他供款賬戶。假如你同時從事多於一份受僱工作，則一般會擁有其他供款賬戶。
- (16) 請小心填寫第 MPF(S)-P(P) 號表格，因為若該表格上所填報的資料（包括簽署）不正確或不完整，受託人可能無法處理你的轉移申請。此外，**切勿在空白的表格上簽署**，以免被第三者填上不正確的資料，因為受託人未必能夠撤銷已採取的行政步驟。
- (17) 填妥第 MPF(S)-P(P) 號表格後，你須把表格交予新受託人處理。轉移手續一般需時約**6至8星期**完成，請參閱載於第 viii 頁的權益轉移程序流程圖。
- (18) 如果你在較早時提交的一項轉移要求尚在處理期間，便不應提交另一份轉移要求申請表。否則，你的轉移要求或未能獲妥善處理。
- (19) 由於處理轉移一般需時約**6至8星期**，所以在你作出轉移選擇當日，你現有強積金賬戶所顯示的基金單位數目，或會與贖回基金單位當日的數目有所不同。原受託人將在贖回日贖回你選擇轉出權益的分賬戶內的所有基金單位，並將有關的權益轉出。
- (20) 根據《2009年修訂條例》，你在每個公曆年內只可選擇轉出僱員強制性供款所產生的累算權益一次（如原計劃的管限規則訂明可多次轉移權益，則不在此限）。**新受託人收到已妥善填寫的選擇表格的日期將用作計算轉移次數有否超出限額**。你可於原受託人向你發出的轉移結算書上查閱該日期，或直接向

<sup>2</sup> 強積金中介人指從事銷售強積金計劃；或就強積金計劃中的成分基金或基礎核准匯集投資基金向客戶提供意見的人。

原受託人查詢。

- (21) 從原計劃轉出你的累算權益後，現職僱主日後為你以及代表你作出的供款（包括僱主及僱員部分）將繼續分配至你在原受託人的計劃所開立的供款賬戶。如你想將該等其後的僱員強制性供款所產生的權益轉移至你在新計劃內的新賬戶，便須在下一個公曆年另行作出轉移選擇（如原計劃的管限規則容許成員在某一公曆年內作出多次轉出選擇，則可在同一個公曆年內作出轉出選擇）。
- (22) 如欲就轉移選擇作出查詢或尋求協助，請聯絡你的原受託人或新受託人。你亦可與積金局聯絡，查詢「僱員自選安排」的一般事項。積金局電郵地址：[mpfa@mpfa.org.hk](mailto:mpfa@mpfa.org.hk) 或熱線電話：2918 0102。
- (23) 請填妥載於第1頁至第3頁的第MPF(S)-P(P)號表格，並提交該表格（「填報須知」毋須提交）予新受託人。

**權益轉移程序流程圖**



~完~

3 「營業日」指並非星期六、公眾假日、烈風警告日或黑色暴雨警告日的任何日子。





**AIA Pension and Trustee Co. Ltd.**  
(Incorporated in the British Virgin Islands  
with limited liability)

1/F, AIA Building  
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MPF

**FORM MPF(S) - P(P)**  
**第 MPF(S) - P(P) 號表格**

(FOR NEW TRUSTEE'S USE ONLY)  
(只供新受託人填寫)  
Form Received Date:  
收到表格日期:

**Please note 請注意:**

Please use **BLOCK LETTERS** for completion of this Form.  
請用**正楷**填寫本表格。

Please read the Guide to Transfer Benefits under Employee Choice Arrangement ("ECA") and Explanatory Notes on page 4 carefully before completing this Form.

填寫本表格前，請先細讀「僱員自選安排」權益轉移指南及第四頁之填報須知。

Delete as inappropriate where marked with "\*\*".  
請於 "\*\*" 項目刪去不適用者。

Please insert "N.A." if not applicable.  
請在不適用處填上「不適用」。

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

### 「僱員自選安排」— 轉移選擇表格

(For employee to transfer accrued benefits from contribution account in an original scheme to an account in a new scheme nominated by the employee during employment)

(適用於僱員在現職期間把原計劃供款賬戶內的累算權益轉移至其自選新計劃的賬戶)

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

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

The personal data to be supplied in this Form are to be used for the purpose(s) of processing your election(s) of transfer as requested in this Form. The personal data you supply may, for the purpose(s) mentioned above or for a purpose directly related to such purpose(s), be transferred to the trustee(s) concerned, the relevant service provider(s), the Mandatory Provident Fund Schemes Authority ("MPFA") and other appropriate parties.

在本表格提供的個人資料，將被用作處理你在本表格內要求的轉移選擇。你所提供的個人資料可能會為達致上述目的，或直接與上述目的有關的目的而轉交有關受託人、相關服務提供者、強制性公積金計劃管理局（簡稱「積金局」），及其他相關機構。

### SECTION I – EMPLOYEE'S DETAILS

#### 第 I 部 – 僱員資料

- (1) Name of Employee (same as that shown on your Hong Kong Identity (HKID) Card <sup>Note 1</sup>)  
僱員姓名（與香港身份證上的姓名相同 <sup>註 1</sup>）: \_\_\_\_\_
- (2) Identification of the Employee 僱員身份證明:  
(a) HKID Card Number 香港身份證號碼: \_\_\_\_\_  
(b) Passport Number 護照號碼: \_\_\_\_\_  
(ONLY for employee without HKID Card 本欄僅供沒有香港身份證的僱員填寫)
- (3) Contact details 聯絡資料:  
(a) Day Time 日間電話: \_\_\_\_\_  
(b) Mobile 流動電話: \_\_\_\_\_  
(c) Email address (if any) 電郵地址（如有）: \_\_\_\_\_
- (4) Correspondence Address 通訊地址:
- |                        |            |  |                          |
|------------------------|------------|--|--------------------------|
| Flat / Room<br>單位/室    | Floor<br>樓 | Block<br>座數                              | Name of building<br>大廈名稱 |
| Street no.<br>街道號碼     |            | Name of street<br>街道名稱                   |                          |
| Name of district<br>區域 |            | Hong Kong / Kowloon / N.T.*<br>香港/九龍/新界* |                          |

### SECTION II – CONTRIBUTION ACCOUNT INFORMATION IN THE ORIGINAL SCHEME

#### 第 II 部 – 原計劃的供款賬戶資料

Details of the account from which accrued benefits derived from mandatory contributions are to be transferred (relevant information can be found on the Notice of Acceptance / Membership Certificate / Annual Benefit Statement issued by the "original trustee"):

就要求轉移由強制性供款衍生的累算權益所屬的賬戶資料（有關資料可參閱由「原受託人」所發出之確認函/成員證明書/周年權益報表）:

- (5) Name of original trustee <sup>Note 2</sup>  
原受託人名稱 <sup>註 2</sup>: \_\_\_\_\_
- Name of original scheme <sup>Note 2</sup>:  
原計劃名稱 <sup>註 2</sup>: \_\_\_\_\_
- Scheme member's account number <sup>Note 2</sup>:  
計劃成員賬戶編號 <sup>註 2</sup>: \_\_\_\_\_
- Name of current employer:  
現職僱主名稱: \_\_\_\_\_
- Employer's identification number <sup>Note 2 & 3</sup>:  
僱主識別號碼 <sup>註 2 及 3</sup>: \_\_\_\_\_

**SECTION III – TRANSFER OF MANDATORY CONTRIBUTIONS** <sup>Note 4</sup>

**第 III 部 – 強制性供款的轉移** <sup>註 4</sup>

Remarks: If you wish to transfer the accrued benefits in section III(6) and section IV(8) to more than one MPF account, please fill in a separate Form MPF(S)-P(P) for each MPF account that receives the accrued benefits. 註: 如欲把第 III 部第 (6) 項及第 IV 部第 (8) 項的累算權益轉移至多於一個強積金賬戶, 請分別就每個將會接收該等累算權益的強積金賬戶填寫一份第 MPF(S)-P(P) 號表格。

(6) Please note the following abbreviations in this section:  
請注意在本部出現的下列簡稱:

<b>EEMC:</b> 僱員強制性供款:	<b>Employee mandatory contributions in <u>current</u> employment</b> <sup>Note 5</sup> 現職期間的僱員強制性供款 <sup>註 5</sup>
<b>FRMC:</b> 以往受僱強制性供款:	<b>Mandatory contributions in respect of <u>former</u> employment(s)</b> <sup>Note 6</sup> 以往的受僱工作的強制性供款 <sup>註 6</sup>

Choose ONE of the following (by ticking the corresponding box) to select the part of the accrued benefits to be transferred:  
請選擇下列其中一項 (在相關的空格內加上✓號), 以選擇你將轉移哪部分的累算權益:

Accrued benefits to be transferred from the original scheme 由原計劃轉出的累算權益	→	MPF account in the new scheme that receives the accrued benefits 新計劃內將會接收累算權益的強積金賬戶	→	
<input type="checkbox"/> (i) Both EEMC <sup>Note 7</sup> and FRMC 僱員強制性供款 <sup>註 7</sup> 及 以往受僱強制性供款	→	Personal account 個人賬戶	→	Fill in Section III - (7)(a) only 只需填寫第 III 部一第 (7) (a) 項
<input type="checkbox"/> (ii) EEMC <sup>Note 7</sup> only 只轉移僱員強制性供款 <sup>註 7</sup>	→	Personal account 個人賬戶	→	Fill in Section III - (7)(a) only 只需填寫第 III 部一第 (7) (a) 項
<input type="checkbox"/> (iii) FRMC only 只轉移以往受僱強制性供款	→	<input type="checkbox"/> (a) Personal account <sup>#</sup> 個人賬戶 <sup>#</sup>	→	Fill in Section III - (7)(a) only 只需填寫第 III 部一第 (7) (a) 項
		<b>OR</b> <b>或</b>		
		<input type="checkbox"/> (b) Contribution account <sup>#</sup> 供款賬戶 <sup>#</sup>	→	Fill in Section III - (7)(b) only 只需填寫第 III 部一第 (7) (b) 項

<sup>#</sup> Please select option (a) OR (b) if (iii) is chosen; note that if both options (a) and (b) are selected, ONLY option (a) will be processed.

<sup>#</sup> 如你選擇第 (iii) 項, 請選擇方案 (a) 或 (b)。請注意, 如兩個方案皆被選擇, 則新受託人只會根據方案 (a) 處理有關轉移。

(7) Information on the MPF account in the new scheme  
新計劃內強積金賬戶的資料

(a) **Personal account**  
**個人賬戶**

Name of new trustee <sup>Note 8</sup>:  
新受託人名稱 <sup>註 8</sup>: \_\_\_\_\_

Name of new scheme <sup>Note 8</sup>:  
新計劃名稱 <sup>註 8</sup>: \_\_\_\_\_

Plan number <sup>Note 8</sup>:  
計劃編號 <sup>註 8</sup>: \_\_\_\_\_

(Only for member elects to transfer into AIA MPF Scheme(s)/計劃編號 僅供選擇友邦強積金計劃的成員填寫)

Scheme member's account number <sup>Note 8</sup>:  
計劃成員賬戶編號 <sup>註 8</sup>: \_\_\_\_\_

(b) **Contribution account (applicable only if you have chosen section III 6(iii)(b) or section IV(8)(iii)(b))**  
**供款賬戶 (只適用於選擇了第 III 部第 (6) (iii) (b) 項或第 IV 部第 (8) (iii) (b) 項的僱員)**

Name of new trustee <sup>Note 8</sup>:  
新受託人名稱 <sup>註 8</sup>: \_\_\_\_\_

Name of new scheme <sup>Note 8</sup>:  
新計劃名稱 <sup>註 8</sup>: \_\_\_\_\_

Scheme member's account number <sup>Note 8</sup>:  
計劃成員賬戶編號 <sup>註 8</sup>: \_\_\_\_\_

Name of employer:  
僱主名稱: \_\_\_\_\_

Employer's identification number <sup>Note 3 & 8</sup>:  
僱主識別號碼 <sup>註 3 及 8</sup>: \_\_\_\_\_

Do you have any accrued benefits derived from voluntary contributions made to your contribution account specified in section II(5) and wish to transfer such accrued benefits to the new scheme's MPF account specified in section III(7)?

你在第 II 部第 (5) 項所指明的供款賬戶內有沒有任何自願性供款所產生的累算權益並希望把此等累算權益轉移至第 III 部第 (7) 項所指明的新計劃的強積金賬戶?

- If NO, please skip section IV and go to section V directly. 如沒有, 則無須填寫第 IV 部, 請直接到第 V 部。
- If YES, please fill in section IV, then go to section V. 如有, 請先填寫第 IV 部, 然後再到第 V 部。

**SECTION IV – TRANSFER OF VOLUNTARY CONTRIBUTIONS** <sup>Note 9</sup> **(ONLY IF THE GOVERNING RULES OF THE ORIGINAL SCHEME PERMIT)**

**第 IV 部 — 自願性供款的轉移** <sup>註 9</sup> **(如原計劃的管限規則准許轉移)**

(8) Please note the following abbreviations in this section:  
請注意在本部出現的下列簡稱：

<b>EEVC:</b>	<b>Employee voluntary contributions in <u>current</u> employment</b> <sup>Note 10</sup>
<b>僱員自願性供款：</b>	<b>現職期間的僱員自願性供款</b> <sup>註 10</sup>
<b>FRVC:</b>	<b>Voluntary contributions in respect of <u>former</u> employment(s)</b> <sup>Note 11</sup>
<b>以往受僱自願性供款：</b>	<b>以往的受僱工作的自願性供款</b> <sup>註 11</sup>

Choose ONE of the following (by ticking the corresponding box) to select the part of the accrued benefits to be transferred:  
請選擇下列其中一項（在相關的空格內加上✓號），以選擇你將轉移哪部分的累算權益：

<b>Accrued benefits to be transferred from the original scheme</b> 由原計劃轉出的累算權益	<b>MPF account in the new scheme that receives the accrued benefits</b> 新計劃內將會接收累算權益的強積金賬戶	
<input type="checkbox"/> (i) Both EEVC and FRVC 僱員自願性供款及 以往受僱自願性供款	Personal account 個人賬戶	→ <b>Fill in Section III - (7)(a) only</b> 只需填寫第 III 部一第 (7) (a) 項
<input type="checkbox"/> (ii) EEVC only 只轉移僱員自願性供款	Personal account 個人賬戶	→ <b>Fill in Section III - (7)(a) only</b> 只需填寫第 III 部一第 (7) (a) 項
<input type="checkbox"/> (iii) FRVC only 只轉移以往受僱自願性供款	<input type="checkbox"/> (a) Personal account <sup>#</sup> 個人賬戶 <sup>#</sup>	→ <b>Fill in Section III - (7)(a) only</b> 只需填寫第 III 部一第 (7) (a) 項
	<b>OR</b> <b>或</b> <input type="checkbox"/> (b) Contribution account <sup>#</sup> 供款賬戶 <sup>#</sup>	→ <b>Fill in Section III - (7)(b) only</b> 只需填寫第 III 部一第 (7) (b) 項

<sup>#</sup> Please select option (a) OR (b) if (iii) is chosen; note that if both options (a) and (b) are selected, ONLY option (a) will be processed.  
<sup>#</sup> 如你選擇第 (iii) 項，請選擇方案 (a) 或 (b)。請注意，如兩個方案皆被選擇，則新受託人只會根據方案 (a) 處理有關轉移。

**SECTION V – AUTHORIZATION AND DECLARATION**

**第 V 部 — 授權及聲明**

(9) I hereby give consent to the MPFA to disclose information collected in this Form to the trustee(s) concerned, the relevant service provider(s) and other appropriate parties, or to enable such party or parties to access the information for the purposes of processing the transfer of my accrued benefits.

本人同意積金局可為處理本人的累算權益轉移，向有關受託人、相關服務提供者，及其他相關機構披露本表格所收集的資料，或使該等人士或機構能夠接觸該等資料。

(10) I declare that: 本人聲明：

- (a) I have read the Guide to Transfer Benefits under Employee Choice Arrangement (“ECA”);  
本人已閱讀《「僱員自選安排」權益轉移指南》的內容；
- (b) at the date of submitting this Form, I am employed by the employer in relation to the contribution account in my original scheme; and  
在提交本表格當日，本人受僱於為本人開設原計劃供款賬戶的僱主；及
- (c) 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正確及詳盡。

Signature of the employee <sup>Note 12</sup>  
僱員簽署 <sup>註 12</sup>

Date (ccyy/mm/dd)  
日期 (年/月/日)

For Intermediary Use	Intermediary Name:	MPF Intermediary Reg. No. :
	Intermediary Code:	Received date & time:
	ME code/Name:	

## Explanatory Notes on Employee Choice Arrangement – Transfer Election Form [Form MPF(S)-P(P)]

- (1) If you do NOT possess a HKID Card, please fill in your name as shown on your passport.
- (2) Please note that the transfer request may not be processed if the name of the original trustee, the name of the original scheme, your scheme member's account number in your original scheme, the name of your current employer or the employer's identification number is not provided or is incorrect. This information can be found:
  - (a) in your membership certificate;
  - (b) in your annual benefit statement; or
  - (c) through the member enquiry facilities available from trustees.

**If you are in doubt, please contact your original trustee or your employer.**
- (3) The employer's identification number is the number assigned by the trustee to the employer concerned. Trustees may use different names for this number (e.g. account number, company code, contract number, employer account number, employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). The number can be found in the statements issued by the trustees or through the member enquiry facilities available from trustees. If you are in doubt, please contact your trustee or your employer.
- (4) If any part of the accrued benefits chosen under section III(6) contains nil balance, that part will not be processed.
- (5)
  - (a) This includes all accrued benefits in the sub-account under s.78(6)(b) of the Regulation.
  - (b) For a casual employee in an industry scheme, this sub-account generally contains the accrued benefits derived from all the employee mandatory contributions made to this sub-account whilst working as a casual employee with different employers.
- (6) This includes all accrued benefits in the sub-account under s.78(6)(c) of the Regulation, which generally contains the accrued benefits derived from the mandatory contributions in respect of your former employment(s) or former self-employment(s) transferred into the contribution account.
- (7) If you have already elected to transfer out the accrued benefits derived from the employee mandatory contributions under section III(6)(i) or (6)(ii) once (or, if the governing rules of the original scheme allow more than once, the maximum number of times allowed by the governing rules) in the same calendar year, transfer of that part of the accrued benefits will not be processed.
- (8) Please note that the transfer request may not be processed if the name of the new trustee, the name of the new scheme, the employer's identification number, the plan number or your scheme member's account number in your new scheme is not provided or is incorrect. The information can be found:
  - (a) in your membership certificate;
  - (b) in your annual benefit statement; or
  - (c) through the member enquiry facilities available from trustees.

You may, however, leave the scheme member's account number blank if you have recently enrolled in the scheme and have not been notified of the new account number. If you are in doubt, please contact your new trustee.
- (9)
  - (a) If you request the transfer out of accrued benefits derived from the voluntary contributions under section IV(8) but the governing rules of the original scheme do not allow this, the option(s) will not be processed.
  - (b) If any part of the accrued benefits chosen under section IV(8) contains nil balance, that part will not be processed.
- (10)
  - (a) This includes all accrued benefits in the sub-account under s.78(6)(e) of the Regulation.
  - (b) For a casual employee in an industry scheme, this sub-account generally contains the accrued benefits derived from all the employee voluntary contributions made to this sub-account whilst working as a casual employee with different employers.
- (11) This includes all accrued benefits in the sub-account under s.78(6)(f) of the Regulation, which generally contains the accrued benefits derived from the voluntary contributions in respect of your former employment(s) or former self-employment(s) transferred into the contribution account.
- (12) The signature must be the same as your specimen signature previously submitted to your original trustee. Please note that the transfer may not be processed if the signature provided in this Form does not match your specimen signature. If you are in doubt, please contact your original trustee.

~END~

### 僱員自選安排—轉移選擇表格[第MPF(S)-P(P)號表格]填報須知

- (1) 如你沒有香港身份證，請填上你在護照上的姓名。
- (2) 請注意，如你沒有提供原受託人名稱、原計劃名稱、原計劃成員賬戶編號、現職僱主名稱或僱主識別號碼，或所提供的資料有誤，則此項轉移要求或不獲處理。你可透過以下途徑獲取有關資料：
  - (a) 成員證明書；
  - (b) 周年權益報表；或
  - (c) 受託人提供的成員查詢服務。

**如有疑問，請聯絡你的原受託人或僱主。**
- (3) 僱主識別號碼即受託人為有關僱主編配的號碼。受託人或會使用不同名稱來設定識別號碼（例如賬戶編號、僱主編號、合約編號、強積金客戶編號、參與計劃編號、計劃編號、附屬計劃編號）。你可在受託人發出的報表上或透過受託人為成員提供的諮詢服務獲取該號碼。如有疑問，請聯絡你的受託人或僱主。
- (4) 如你在第III部第(6)項選擇轉移的累算權益的任何部分是「零」結餘，則該部分權益的轉移要求將不獲處理。
- (5)
  - (a) 這包括《規例》第78(6)(b)條所指的分賬戶的全部累算權益。
  - (b) 就行業計劃的臨時僱員而言，這個分賬戶一般包含在以臨時僱員身份受僱於不同僱主期間向這個分賬戶所作出的所有僱員強制性供款所產生的累算權益。
- (6) 這包括《規例》第78(6)(c)條所指的分賬戶的全部累算權益。這個分賬戶一般包含已轉移至供款賬戶的前受僱工作或前自僱工作的強制性供款所產生的累算權益。
- (7) 如你已於同一公曆年內在第III部第(6)(i)項或第(6)(ii)項要求把僱員強制性供款所產生的累算權益轉出一次（或如原計劃管限規則准許作出多於一次的轉移，而你已要求轉移管限規則容許的最多轉移次數），則該部分累算權益的轉移要求將不獲處理。
- (8) 請注意，如你沒有提供新受託人名稱、新計劃名稱、新僱主識別號碼、新計劃編號或新計劃成員賬戶編號，或所提供的資料有誤，則此項轉移要求或不獲處理。你可透過以下途徑獲取有關資料：
  - (a) 成員證明書；
  - (b) 周年權益報表；或
  - (c) 受託人提供的成員查詢服務。

不過，如你最近才參加計劃，並未獲悉新的成員賬戶編號，則可留空此項。如有疑問，請聯絡你的新受託人。
- (9)
  - (a) 如你在第IV部第(8)項要求把自願性供款所產生的累算權益轉出，但原計劃的管限規則並不准許轉移，則有關轉移要求將不獲處理。
  - (b) 如你在第IV部第(8)項選擇轉移的累算權益的任何部分是「零」結餘，則該部分權益的轉移要求將不獲處理。
- (10)
  - (a) 這包括《規例》第78(6)(e)條所指的分賬戶的全部累算權益。
  - (b) 就行業計劃的臨時僱員而言，這個分賬戶一般包含在以臨時僱員身份受僱於不同僱主期間向這個分賬戶所作出的所有僱員自願性供款所產生的累算權益。
- (11) 這包括《規例》第78(6)(f)條所指的分賬戶的全部累算權益。這個分賬戶一般包含已轉移至供款賬戶的前受僱工作或前自僱工作的自願性供款所產生的累算權益。
- (12) 你的簽署必須與你之前提交予原受託人的簽名式樣相同。請注意，若本表格上的簽署與你的簽名式樣不符，有關轉移或不獲處理。如有疑問，請聯絡你的原受託人。

~完~

Date:

AIA Company (Trustee) Limited  
1/F, AIA Building,  
1 Stubbs Road,  
Hong Kong

Attn: MPF & Pensions Admin. Department

**Re : Request of Change of Servicing Broker / Appointment of Servicing Broker**

MPF Scheme Name

- AIA MPF - Prime Value Choice  
 AIA MPF - Simple Value Choice  
 AIA MPF – Basic Value Choice

Personal Account No. \_\_\_\_\_

Self-Employed Scheme No. \_\_\_\_\_

Employer Scheme No. \_\_\_\_\_

I / We \_\_\_\_\_, holder of \_\_\_\_\_  
(HKID Card / Passport number / BR No.) hereby appoint **Sun Flower Insurance Brokers Limited** (Principal MPF Reg. No. CI000177 / Broker Code 1946) as my/our servicing intermediary with immediate effect to handle and follow the MPF/ORSO issues. The broker name, address and telephone number(s) are as follows:-

Sun Flower Insurance Brokers Limited  
Room 1108, Hing Yip Commercial Centre,  
272-284 Des Voeux Road Central, HK  
Tel. : (852) 2521 1881  
Fax : (852) 2521 1919  
Contact Person: Lam Mei Wah, Vivian (Subsidiary MPF Reg. No. 074161)

There is no additional service charge to be imposed by the above-mentioned arrangement.

This appointment shall supersede all my/our previous appointment and valid until further notification from me/us. I/We reserve the right to terminate this appointment at any time by written notice.

Thank you for your kind attention and assistance.

Yours Faithfully,

\_\_\_\_\_  
Signature (with company chop if applicable)

日期：

美國友邦（信託）有限公司  
香港司徒拔道 1 號  
友邦大廈 1 樓

聯繫人：強積金及退休金服務部

### 要求更換服務代理/服務代理人委任書

強積金計劃名稱  友邦強積金優選計劃  
 友邦強積金簡選計劃  
 友邦強積金尚選計劃

個人帳戶編號

自僱人士計劃編號

僱主計劃編號

請注意，由即日起本人/本公司茲委任**新華保險顧問有限公司**（強積金主事中介人註冊編號IC000177 / 保險經紀編號 1946）作為我/我們的中介人處理和跟進本司的強積金及公積金事宜。中介人名稱，地址和電話號碼如下：

新華保險顧問有限公司  
香港德輔道中 272-284  
興業商業中心 1108 室  
電話：(852) 2521 1881  
傳真：(852) 2521 1919  
聯繫人：林美華小姐（強積金附屬中介人註冊號碼：074161）

上述安排無須收取任何額外服務費。

此更換服務代理通知將取代所有本人/本公司以前所發出的通知書，有效至另行通知。  
我/我司有權在任何時候以書面方式終止此服務代理。

此致

\_\_\_\_\_  
簽署（公司蓋印，如適用）