

計劃成員資金轉移申請表

SCHEME MEMBER'S REQUEST FOR FUND TRANSFER FORM (適用於自催人士、個人帳戶持有人或終止受僱的僱員) (for self-employed person, personal account holder or employee ceasing employment) (強制性公積金計劃(一般)規例)(簡稱《規例》)第 145、146、147、148 及 149 條

MPF(S)	– P(M)

				¥ 《 規 例 》) 录 145、146、147、148 及 149 ovident Fund Schemes (General) Regulation ("the Regulation	
注意: Note:	理你在本表格內要求 強制性公積金計劃管 to Transfer Benefits Form are to be used purpose(s) mentione	的轉移選擇。你 理局(簡稱「積 By Scheme Men for the purpose(ed above or for a	所提供的個人資料可能會爲達致上述目 金局」),及其他相關機構。 Please u nber" and "Explanatory Notes" before y s) of processing your election(s) of trar	轉移權益須知》及《塡報須知》。在本表格损 的,或直接與上述目的有關的目的而轉交有關 se <u>BLOCK LETTERS</u> for completion of this F rou complete Form MPF(S)-P(M). The person isfer as requested in this Form. The personal pose(s), be transferred to the trustee(s) condi- denter concentration	I受託人、相關服務提供者、 orm. Please read the "Notes al data to be supplied in this data you supply may, for the
笛	- <i>v</i>		NILS OF THE SCHEME MEMBE		
	4月 · 計画次受受 将 主名 (與香港身份證相同)	r		-11	
	ame (same as HKID				
1	港身份證號碼			3) 護照號碼	本欄僅供沒有香港身份證 的成員塡寫 ONLY for member
	KID Card Number			Passport Number	without HKID Card
/ -	話號碼 elephone Number			5) 手提電話 Mobile Number	
	i訊地址			WODIC NUMBER	
С	orrespondence Ado				
		Part II: FUN	D TRANSFER INFORMATION	(請填寫原計畫的強積金帳戶資料。Please	e fill in details of the MPF account in the original scheme.)
7) 原	受託人名稱 ^{註2}	Note 2			
N 8) 原	ame of Original Trus 計劃名稱 ^{誰2}	stee			
N	ame of Original Sch	neme ^{Note 2}			
	·劃成員帳戶號碼 ^{註2}		【計劃爲「 <i>交通銀行倫盈退休強積金計劃」,</i> 】供「計劃編號」於本欄。Please provide		
S	cheme Member's A Jumber Note 2	Account the	"Scheme Number" in this field if the Origin neme is "BCOM Joyful Retirement MPF Sch		
			選擇以下其中一個帳戶並於適當		
				g accounts and ✓ as appropriate :	
10)	積金帳戶類別		個人帳戶 Personal Account		
Ту	ype of MPF accoun	nt	<u>或 OR</u>		
			供款帳戶 Contribution Accou	unt	
44) 51			7 / K & / h lm / L + h lf / h - h h 用 / h + h	\	
			受僱後欲把供款帳戶內的累算權在		
	etails of former er essation of emplo		pplicable for employee who	wishes to transfer-out the accrue	d benefits from a contribution account after
		ymenty ·			
前	前僱主名稱 Name of	f Former Emp	loyer :		
偱	富主識別號碼 ^{註3} Emp	olover's Identi	fication Number Note 3		
	· · · ·			d status (applicable for self-employe	ed person only):
				your reason of transfer and ✓ as appr	,
			essation of self-employment, with		(日/月/年 dd/mm/yyyy)
_					
 本人將會維持自僱,並把本人的累算權益轉移至第三部第(13)項所述的另一個強積金計劃。本人向原計劃供款的最後日期是: I will remain in self-employment and my accrued benefits will be transferred to another MPF scheme stated in Part III (13). Contributions to the 					
	original scheme	e should be pa	id up to :	(日/月/年 dd/mm/yyyy)
Arts	☆17 ・ 士宙エクマケ へ からぶ思 #				
	部:轉移資金的選擇				ill in details of the MPF account in the new scheme.)
				lを主以下帳尸(<i>請仕下列週用的万格/</i> 2/ t II to the following account <i>(please ✓</i>	<i>塡上✓號)</i> : I elect to transfer the accrued benefits the appropriate box below) :
				с	
	(a) 轉移至本/	人 <u>新僱主</u> 就本。	人開立的供款帳戶 To my contrib	oution account with my new employer	
				Bank of Communications Trustee Li	mitod
	新受託人 Name of N	名稱≝⁼ New Trustee ^N			
				, please specify	
	新計劃名和 Name of N	稱 ^{ᆴ₄} New Scheme ^l	Note 4	責金計劃 BCOM Joyful Retirement MF	
ļ			其他,請註明 Others	, please specify	
	Scheme M	賬戶號碼 ^{畦4} ∕lember's Acc	ount		
	Number No	ote 4			
	新僱主名利	爯			
		New Employe	r		
	僱主識別別				
	Employer Number ^{No}	's Identificatio	n		
1	INUTIDE		I		



計劃成員資金轉移申請表

			見例》)第 145、146、147、148 及 149 條 Fund Schemes (General) Regulation ("the Regulation")			
(b)	轉移至本人新計劃內的指定	定帳戶 To my designated account	in the new scheme			
	新受託人名稱 ^{主4}		nk of Communications Trustee Limite	d		
	Name of New Trustee Note	^₄ □ 其他,請註明 Others, ple	ase specify			
	新計劃名稱 ^{≝4}	□ 交通銀行愉盈退休強積金調	計劃 BCOM Joyful Retirement MPF S	cheme		
	Name of New Scheme	² ^₄ □ 其他,請註明 Others, ple	ase specify			
	計劃成員帳戶號碼 ^{誰4} Scheme Member's Accou Number ^{Note 4}	如新計劃為「 <i>交通銀行操產退休排預金計劃」</i> 請提供「計劃編號」於本欄。 Please provic the "Scheme Number" in this field if the N Scheme is "BCOM Joyful Retirement MPF	le ew			
(c)	以個人帳戶形式保留在原	計劃 (如適用) Retained in the orig	inal scheme as personal account (wh	ere applicable)		
14) 有關本/				^{ie 5} (if any) in my account stated in Part II.		
		Ŋ塡上✓號。Please select option (
	如你沒有作出任何選擇,而帳戶 並沒有該等權益,則有關選擇 將		該等權益將以處理第三部第(13)項的權益的问	司樣方式處理。如你已在第三部第(14)項作出選擇,而		
(Remar those s	ks: If you do not select any op tated in Part III(13). If there are	tions but there are accrued benefits e no such benefits in your account a	nd you have made an election in Part III	hose benefits will be handled in the same way as (14), the selected option will not be processed.)		
	contributions as in Part III	(13).	-	accrued benefits derived from the mandatory		
		収櫂益。Withdrawn in accordance 內塡上✔號):Method of payment(with the governing rules of the original $r_{\rm res}$	al scheme.		
	□ 支票付款 By Cheque	小真上,"航), Method of payment (
	且銀行可能會因此而收	y取費用。詳情請向原受託人查詢。	·)	項選擇只適用於有提供此項服務的受託人,並		
	applicable). (This opt	tion is applicable only to trustees v	ne of scheme member only (a bank a who provide such services and there	account under the name of a third party is no may be bank charges involved. Please check		
	 with the original trustee for details.) 如原受託人乃交通銀行信託有限公司,其提供之直接存入服務<u>只限存入交通銀行香港分行帳戶</u>。 For Bank of Communications Trustee as the original trustee, direct depositing service is <u>only restricted to bank account with Bank of</u> 					
		Co., Ltd. Hong Kong Branch.	, , , , , , , , , , , , , , , , , , , ,			
	銀行名稱Name		Bank of Communications Co., Ltd.	Hong Kong Branch		
		人姓名 Name of bank account hold	ler :			
	▶ 此欄只適用於原受調	Bank account number: 027 託人 <u>不是</u> 交通銀行信託有限公司。	This field is only applicable where orig	ginal trustee is <u>NOT</u> Bank of Communications		
	Trustee Limited. 銀行名稱 Name	o of bank '				
		b of bank · · · · · · · · · · · · · · · · · · ·	der :			
		Bank account number :				
第四部:終	止沒有剩餘款項的強積金帳用	(如適用) Part IV: TERMINATI	ON OF MPF ACCOUNT WITH NO R	ESIDUAL BALANCE (IF APPLICABLE)		
I hereby give		on to terminate my relevant MPF me		並無剩餘款項的情況下,終止該強積金成員帳戶。 on transfer of the full accrued benefits to the new		
第五部:授	權及聲明 Part V: AUTHOR	RIZATION AND DECLARATION				
人聲明:本人	己閱讀《計劃成員轉移權益須知	印》的内容;及盡本人所知所信,本表	转格所提供的資料正確及詳盡。 I hereby	資料,或使該等人士或機構能夠接觸該等資料。本 give consent to the MPFA to disclose information		
information fo	r the purposes of processing t		declare that: I have read the Notes to T	nable such party or parties to access the ransfer Benefits by Scheme Member; and to the		
			\frown			
			(s.v.			
	計劃成員簽署 ^{註6} Signatu	re of the Scheme Member Note 6	受託人核印	日期 Date		
港分/支行。否则 form to "Opera	則,請提交此表格(《塡報須知》 tions Department, Bank of Com	無須提交)予新受託人。For transferring munications Trustee Limited", 1/F, Far	to your MPF account of BCOM Joyful Reti East Consortium Building, 121 Des Voeux	託有限公司營運部」收,或交回任何一間交通銀行香 rement MPF Scheme, please forward this completed Road Central, HK, or send through any branch /		
	of Bank of Communications Co.,	Ltd. Hong Kong Branch. Otherwise, pl	ease forward this form (excluding the 《Expl	anatory Notes ») to the new trustee after completion		
中介人專用 <u>單位 / 機構</u>	強積金中介人編號 強積金中介人	姓名 強積金中介人簽署				

計劃成員轉移權益須知

Notes to Transfer Benefits By Scheme Member (適用於自僱人士、個人帳戶持有人或終止受僱的僱員)

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

(1) 用詞定義 Definition of terms:

- a.「供款帳戶」- 指強積金計劃下主要用以接收僱主爲僱員所作出以及代表僱員所作出的強積金供款(包括僱主及僱員部分)或自僱人士所作出的強積金供款的帳戶。 "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 or by a self-employed person.
- 「個人帳戶」 指強積金計劃下主要用以接收由另一帳戶轉入的累算權益的帳戶。
- "Personal account" an account in an MPF scheme which is mainly used to receive the accrued benefits transferred from another account(s). 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」)-指轉出你的累算權益的強積金計劃的受託人。
- "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.
- 新受託人」(在《規例》中亦稱「承轉受託人」-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帳戶或轉移至同一受託人的另一個強積金計 d. 「 劃,在第 MPF(S)-P(M)號表格所述的新受託人將與原受託人相同。

"New trustee" (also known as "transfered 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(M) will be the same as the original trustee. e.「原計劃」- 指轉出你的累算權益的強積金計劃。

- "Original scheme" the MPF scheme from which your accrued benefits are to be transferred.
- 「新計劃」- 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帳戶,在第 MPF(S)-P(M)號表格所述的新計劃將與原計劃相同。
- "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(M) will be the same as the original scheme.
- (2) 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。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 guaranteee conditions not being satisfied; thus affecting your entitlement to the guarantee. Please check the offering document of the original scheme or consult your original trustee for details.
- (3) 請確保你在新計劃已開立個人帳戶或供款帳戶。否則,你在向新受託人提交第 MPF(S)-P(M)號表格之前,便須登記參加該新計劃。Please ensure that you have a personal account or a contribution account in the new scheme. Otherwise, you have to enrol in that scheme before you submit Form MPF(S)-P(M) to the new trustee.
- 如欲從多於一個帳戶轉出累算權益,請就每個帳戶分別提交一份第 MPF(S)-P(M)號表格。If you wish to transfer-out the accrued benefits from more than one accounts, you should submit a separate Form (4) MPF(S)-P(M) for each of those accounts -
- 如欲在現職期間從你的供款帳戶轉出累算權益,請填寫第 MPF(S)-P(P)號表格。If you wish to transfer-out the accrued benefits from your contribution account during employment, you should complete Form (5) MPF(S)-P(P).
- 就每一個帳戶,除了由白頤性供款所產生的累質權益或可根據原計劃管限規則澤擇提取外,計劃成員應把帳戶內的所有累質權益整筆轉移。For each account, a scheme member should transfer the (6) entirety of his accrued benefits therein in a lump sum except the part of the accrued benefits derived from voluntary contributions which the scheme member may elect to withdraw in accordance with the governing rules of the original scheme
- (7) 請小心填寫第 MPF(S)-P(M)號表格,因爲受託人未必能夠撤銷已採取的行政步驟。Please complete Form MPF(S)-P(M) carefully as the administration procedures taken by the trustees may not be reversible.
- 若你在第 MPF(S)-P(M)號表格上所提供的任何資料(包括簽署)不正確或不完整,受託人可能無法處理你的權益轉移要求。If any information provided on Form MPF(S)-P(M) (including the signature) is (8) incorrect or incomplete, the trustees may not be able to process your benefit transfer request.
- 新計劃的資料載於該計劃的要約文件,此等資料將有助你決定是否把累算權益轉移至該計劃。你可向新受託人索閱該要約文件。Information about the new scheme is set out in the offering document of (9) that scheme. This information will assist you in making a decision about whether to make a transfer to that scheme. Copies of that offering document can be obtained from the new trustee upon request.
- (10) 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。你亦可與強制性公積金計劃管理局(簡稱「積金局」)聯絡,查詢有關資金轉移的一般事項。積金局電郵地址: mpfa@mpfa.org.hk或熱線電話: 2918 0102。 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 fund transfer, you may contact the Mandatory Provident Fund Schemes Authority ("MPFA") via e-mail: mpfa@mpfa.org.hk or hotline: 2918 0102.

塡報須知

Explanatory Notes

註 Note (1) 如你**沒有**香港身份證,請塡上你在護照上的姓名。If you do NOT possess a HKID Card, please fill in your name as shown on your passport.

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

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 the original scheme, type of MPF account, the name of your former employer or the employer's identification number is not provided or is incorrect. This information can be found: a. 成員證明書; in your membership certificate;

- b. 周年權益報表; 或 in your annual benefit statement; or
- c. 受託人提供的成員查詢服務。through the member enquiry facilities available from trustees.
- 如有疑問[,]請聯絡你的原受託人或僱主。If you are in doubt, please contact your original trustee or your employer.
- 註 Note (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(例如帳戶編號、僱主編號、合約編號、強積金客戶編號、參與計劃編號、計劃編號、附屬計劃 編號)。你可在受託人發出的報表上或透過受託人爲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。 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.
- 註 Note (4) 請注意,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: Please note that the transfer request may not be processed if the name of the new trustee, the name of the new scheme or your scheme member's account number in the new scheme is not provided or is incorrect. The information can be found:
 - a. 成員證明書; in your membership certificate;
 - b. 周年權益報表; 或 in your annual benefit statement; or

c. 受託人提供的成員查詢服務。through the member enquiry facilities available from trustees.

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

- 註 Note (5) 計劃成員可在原受託人向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從自願性供款產生的累算權益。成員亦可利用受託人提供的查詢服務查核這項資料。如有疑問,請 聯絡你的原受託人。A scheme member can check whether his existing MPF account contains any accrued benefits derived from voluntary contributions from his annual benefit statement issued by the original trustee to the member. The member can also check this information through the member enquiry facilities available from trustees . If you are in doubt, please contact your original trustee.
- 註 Note (6) 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。 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.

Date:

Bank of Communications Trustee Limited 1/F, Far East Consortium Building 121 Des Vouex Road Central, Hong Kong

Attn: MPF & Pensions Admin. Department

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

MPF Scheme Name	BCOM Joyful Retirement MPF Scheme
Personal Account No.	
Self-Employed Scheme No.	
Employer Scheme No.	

I / We ______, holder of ______, (HKID Card / Passport number / BR No.) hereby appoint <u>Sun Flower Insurance Brokers</u> Limited (Principal MPE Reg. No. C1000177 / Broker Code 1946) as my/our servicing

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:

交通銀行信託有限公司 香港中環德輔道中121號 遠東發展大廈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

交通銀行愉盈退休強積金計劃

□ 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