



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



IMPORTANT 重要事項

PLEASE READ THE PRINCIPAL BROCHURE BEFORE COMPLETING THIS FORM. WORDS AND EXPRESSIONS IN THIS FORM HAVE THE SAME MEANING AS IN THE PRINCIPAL BROCHURE.
請於填寫本申請書前參閱計劃主要說明書。本申請書的詞彙及措辭均與主要說明書同義。

Please Note:

This form should be completed in **BLOCK LETTERS AND IN BLACK INK.**
Leave a space between numbers and words.
Delete as appropriate where marked with " * ".
Submit the completed form with **ORIGINAL SIGNATORY**, fax copy will not be processed.

請注意：

本表格必須以**正楷及黑筆**填寫。
請於數字與文字之間留一個空格。
請於" * "項目刪去不適用者。
請呈交填妥並附有**親筆簽署**之表格**正本**，傳真本將不獲處理。

PART A: PERSONAL DETAILS 第一部分：個人資料 (all shaded fields in this section must be completed 本部分內所有灰色欄目必須填寫) PS15067

1. Name 姓名 (Same as HKID Card/Passport 與香港身份證/護照相同) : Mr. 先生 Ms. 女士
English (Surname first) 英文(先寫姓氏) : _____ Chinese 中文 : _____

2. Date of Birth 出生日期 : _____ 3. HKID Card/Passport* No. 香港身份證/護照* 號碼 : _____
ccyy 年 mm 月 dd 日 (Please attach copy, otherwise your application might be rejected 請附上副本，否則閣下的申請將可能被拒絕)

4. Tel. No. 電話號碼 : Day Time 日間電話 _____ Mobile 流動電話 _____
(Area Code 地區代號) (Area Code 地區代號)

5. Fax No. 傳真號碼 : _____
(Area Code 地區代號)

6. E-mail 電郵 : _____

7. Language Preference 語言選擇 : (If no preference is indicated, the language preference will default to 'Chinese'. 如沒有指明，語言選擇將自動設定為「中文」。) Chinese 中文 English 英文

8. Home Address 住宅地址 : (P.O. Box will not be accepted 郵政信箱恕不受理)
Flat/Room 單位/室 _____ Floor 樓 _____ Block 座數 _____
Building 大廈名稱 _____
Name of Street 街道名稱 _____
District 區域 _____ HK香港/KLN九龍/NT新界*

PART B: PARTICULARS OF SELF-EMPLOYED BUSINESS (if applicable) 第二部分：自僱商業資料 (如適用)

1. Name of Business 公司/業務名稱
English 英文 : _____
Chinese 中文 : _____

2. Principal Place of Business 營商地址 :
Unit 單位 _____ Floor 樓 _____ Block 座數 _____
Building 大廈名稱 _____
Name of Street 街道名稱 _____
District 區域 _____ HK香港/KLN九龍/NT新界*

3. Tel. No. 電話號碼 : _____
(Area Code 地區代號)

4. Type of Registration 註冊類別 : (you may tick more than one 可選擇下列多項)

Business Registration 商業登記證^[BR] - No. 號碼 : _____

Inland Revenue Department 稅務局 (charitable organizations only 祇適用於慈善團體)^[IR] - No. 號碼 : _____

Society of the Hong Kong Police 香港警務處社團事務處 (societies only 祇適用於社團)^[SO] - No. 號碼 : _____

Education Department 教育署^[ED] - No. 號碼 : _____

Registry of Trade Union 職工會登記局^[TU] - No. 號碼 : _____

Others 其他 - No. 號碼 : _____

(please specify 請註明 : _____)

PART C: MAILING ADDRESS 第三部分：郵遞地址 (tick one only 只須選擇一項)

- Home 住宅 Principal Place of Business 營商地址

The address chosen will be used as official correspondence address for future communication. If you have not indicated your preference, all correspondence will be mailed to your home address.

所選擇之地址將會用作日後聯絡之通訊地址。若閣下未有作出選擇，所有通訊將被寄往閣下之住宅地址。

PART D: NATURE OF BUSINESS 第四部分：商業類別 (tick one only 只須選擇一項)

- Construction 建築業 Mining and quarrying 開礦及採石
 Community, social and personal services 社區、社會及個人服務 Restaurants and hotels 餐廳及酒店業
 Electricity and gas 電力及煤氣 Technology 科技行業
 Finance, insurance, real estate and business services 金融、保險、地產及商業服務 Transport, storage and communications 運輸、倉務及通訊業
 Import/Export trades 出/入口貿易 Wholesale and retail 批發及零售業
 Manufacturing 製造業 Others 其他 (please specify 請註明：_____)

PART E: CHOICE OF INVESTMENT PORTFOLIO 第五部分：投資組合選擇

Allocation must be in multiples of 5% and the total should add up to 100%. 有關分配必須為 5% 的倍數，而總和必須為 100%。

Constituent Fund 成分基金	Contribution Allocation 供款分配 (%)	For Internal Use Only 只供 內部使用	Constituent Fund 成分基金	Contribution Allocation 供款分配 (%)	For Internal Use Only 只供 內部使用	Constituent Fund 成分基金	Contribution Allocation 供款分配 (%)	For Internal Use Only 只供 內部使用
Funds with Management Fees at 0.99%[^] 0.99%基金管理費基金 [^]			Other Funds 其他基金			Guaranteed Fund 保證基金		
Equity Funds - Index-Tracking Collective Investment Scheme Series[#] 股票基金 - 緊貼指數集體投資計劃系列 [#]			Dynamic Asset Allocation Fund 動態資產配置基金			Guaranteed Portfolio 保證組合		
American Fund 美洲基金		3G	Manager's Choice Fund 基金經理精選退休基金		93	Lifestyle Funds 人生階段基金		
Eurasia Fund 亞歐基金		3E	Equity Funds 股票基金			Growth Portfolio 增長組合		W3
Hong Kong and China Fund 中港基金		3F	Asian Equity Fund 亞洲股票基金		L3	Balanced Portfolio 均衡組合		B3
World Fund 全球基金		83	European Equity Fund 歐洲股票基金		E3	Capital Stable Portfolio 穩定資本組合		V3
Fixed Income Funds 固定入息基金			Japan Equity Fund 日本股票基金		J3	Fidelity Growth Fund 富達增長基金		3C
Asian Bond Fund 亞洲債券基金		3D	Greater China Equity Fund 大中華股票基金		D3	Fidelity Stable Growth Fund 富達穩定增長基金		3B
Global Bond Fund 環球債券基金		63	Hong Kong Equity Fund 香港股票基金		K3	Fidelity Capital Stable Fund 富達穩定資本基金		3A
MPF Conservative Fund 強積金保守基金		R3	North American Equity Fund 北美股票基金		N3	RCM Growth Fund RCM增長基金		23
			Green Fund 綠色退休基金		53	RCM Stable Growth Fund RCM穩定增長基金		33
						RCM Capital Stable Fund RCM穩定資本基金		43
Total 總和							100%	

[^] For Funds with management fees at 0.99%, the total Management fees chargeable at both the Constituent Fund level and its relevant underlying fund level shall be 0.99% per annum of net asset value at current level. 就0.99%基金管理費基金而言，於成分基金及其相關基礎基金層面所收取的基金管理費總額目前水平為每年淨資產值的0.99%。

[#] The Constituent Funds in this category are portfolio management funds investing in more than one Index-Tracking Collective Investment Schemes approved by the MPFA. These Constituent Funds are not index-tracking funds. 本基金類別中的成分基金為投資組合管理基金，投資於一項以上積金局核准緊貼指數集體投資計劃。有關成分基金不是緊貼指數基金。

Warning: If your investment choices are in multiples of 5% but the total is less than 100%, the remaining unallocated percentage will be invested in the Guaranteed Portfolio or such other Constituent Funds as the Trustee may determine from time to time. In the event that you do not make any investment choices or your instruction is incorrect, 100% of your investment amount will be invested in the Guaranteed Portfolio until the Trustee receives a valid and correct investment instruction from you.

警告： 如投資分配為5%之倍數，但總和少於100%，剩餘未作投資選擇之分配將投資於保證組合，或受託人所不時決定的其他成分基金。如閣下沒有指明投資選擇或閣下之指示不正確，投資款額將百分百投資於保證組合直至受託人收到閣下之符合規定及正確的投資指示。

PART F: AUTHORIZATION FOR THE RELEASE OF MEMBER ACCOUNT INFORMATION (This section is voluntary)**第六部分：發放成員賬戶資料授權書(此部分純屬自願性質)**

For my member account to be set up under this application, I hereby authorize AIA Company (Trustee) Limited (the "Trustee") to release my account balance (by fund and by source), its detail breakdown (including total contribution / transfer in, total withdrawal and unrealized gain / loss) and investment choices (the "Relevant Data") of this member account to my MPF Intermediary with details listed in this form, via the Trustee's Interactive Website for the purposes of assessing and advising me on my need for MPF related services provided by the Trustee with immediate effect until there is a change in the servicing MPF Intermediary for this member account or such time when I withdraw this authorization or this member account is terminated for any reason.

就本人經由此申請表格開立之成員賬戶，本人謹此授權友邦(信託)有限公司(「受託人」)透過受託人之互動網頁，向本人之強積金中介人發放本人於此成員賬戶內之賬戶結餘(按基金類別及資金來源計算)，其詳細分類(包括供款/轉入資產總計/提取供款總計及未實現收益/虧損)及投資選擇(「有關資料」)，從而為本人就受託人提供之強積金相關服務需要作出評估及建議。此項授權將即時生效直至此成員賬戶之指定強積金中介人有所更改，或本人提出取消此項授權，或此成員賬戶因任何原因被終止。

Signature of Member 成員簽署

PART G: FREQUENCY OF CONTRIBUTIONS 第七部分：供款次數 (tick one only 只須選擇一項) Monthly 每月一次 Annually 每年一次

Date of Participation 參與計劃日期：

(Participation date should be the first day of the specified month 參與日期為此月份之首天)

____/____/____
ccyy 年 mm 月

If you do not choose either one of the payroll frequencies, annual mode will be defaulted.
若閣下不作出任何選擇，供款次數將被設定為每年一次。

PART H: METHODS OF PAYMENT 第八部分：繳付方法 (tick one only 只須選擇一項) Direct Debit 直接付款 (please complete and return the attached Direct Debit Authorization Form for further processing 請填妥並交回附上之「直接付款授權書」以便處理) Cheque 支票**Please do not send or give cash to an intermediary. Crossed cheque should be made payable to "AIA Co. (Trustee) Ltd. - Prime".****請勿郵寄或繳付現金予中介人。劃線支票抬頭請填上「友邦(信託)有限公司 - 優選」。****PART I: RELEVANT INCOME 第九部分：有關入息**

Scheme Year ^{note 1 & 2} 計劃年度 ^{備註 1 及 2}		Maximum ^{note 3} contribution will be made (Yes/No) ^{備註 3} 繳付最高供款額 (是/否)	If maximum contribution will not be made, please complete the following 如不欲繳付最高供款額，請填寫下列資料	
From 由	To 至		Relevant Income ^{note 4} 有關入息 ^{備註 4}	Supporting document ^{note 5} of the relevant income provided (Yes/No) ^{備註 5} 附有入息證明文件 (有/沒有)
Date of Participation 參與計劃日期	30 November _____ _____年11月30日		<input type="checkbox"/> Assessable profit 評估利益 HK\$ 港元 _____ <input type="checkbox"/> Basic allowance 基本免稅額	
1 December _____ _____年12月1日	30 November _____ _____年11月30日		<input type="checkbox"/> Assessable profit 評估利益 HK\$ 港元 _____ <input type="checkbox"/> Basic allowance 基本免稅額	
1 December _____ _____年12月1日	30 November _____ _____年11月30日		<input type="checkbox"/> Assessable profit 評估利益 HK\$ 港元 _____ <input type="checkbox"/> Basic allowance 基本免稅額	

Note 備註：

- Scheme year is from 1 December of one year to 30 November of the following year.
計劃年度為每年的十二月一日至翌年的十一月三十日。
- If your Date of Participation (as indicated in Part G) was before the commencement of the current scheme year, please specify relevant income for each scheme year since participation.
如閣下之參與計劃日期(列明於第七部分)為本計劃年度開始日之前，請從參與日期起就每一個計劃年度申報有關入息。
- Maximum contribution shall mean HK\$1,500 per month or HK\$18,000 per year or such maximum contribution amount in respect of the maximum level of relevant income as stipulated by the Mandatory Provident Fund Schemes Ordinance (Cap. 485) from time to time.
最高供款額將指每月港幣1,500元或每年港幣18,000元或根據隨時間所需而修訂之《強制性公積金計劃條例》(第485章)所規定的有關入息上限而釐定的最高供款額。
- You are responsible for reporting your Relevant Income accurately to the Trustee. You will be held liable for any inaccuracy of information reported herein.
閣下須確保所申報的有關入息準確無誤，否則閣下須負上法律責任。
- You are required to provide any one of the followings as evidence of your relevant income
 - Notice of Assessment issued by the Inland Revenue Department
 - Statement of Loss (please provide supporting documents showing the amount of loss and how it was calculated under Part IV (Profits Tax) of the Inland Revenue Ordinance (Cap. 112))
閣下須提交下列其中一項文件以作有關入息證明
 - 由稅務局發出的評稅通知書
 - 虧損表(提供相關文件以顯示虧損總額，並根據《稅務條例》(第一一二章)第四部(利得稅)所列之計算方式計算)

PART J: DOCUMENTS TO BE PROVIDED WITH THIS APPLICATION FORM 第十部分：連同本申請書一併呈交之文件

- copy of Business Registration Certificate or other certificate (within 1 year validity) as indicated in Part B(4), if applicable.
商業登記證副本或列明於第二部分(4)之其他證明文件(於一年內有效)，如適用。

PART K: DECLARATION 第十一部分：聲明

I understand and acknowledge that I have received and read the Principal Brochure applicable to the Scheme and that by signing this application form:

- (a) I am entering into a legally binding agreement with the Trustee to participate in and contribute to the Scheme.
 (b) I undertake to the Trustee to comply with all relevant provisions of the documentation governing the Scheme to the extent applicable to the self-employed person and, in particular to:
 - notify the Trustee in writing in relation to any changes of information provided by me in this application form; and
 - provide the Trustee with such information and assistance as the Trustee may reasonably require in order to enable the Trustee to comply with its obligations under the MPF Legislation.
 (c) I agree and consent to my participation in the Scheme being terminated by the Trustee, upon 3 months' prior written notice having been given by the Trustee, if I fail to carry out any undertaking made by me.

本人明白並確認已收受及閱讀本計劃之主要說明書，在簽署本申請書後：

- (a) 本人即與受託人達成法定合約，承諾參與本計劃及向計劃作出供款；
 (b) 本人向受託人承諾遵守本計劃內適用於自僱人士的所有有關條文，包括：
 - 書面通知受託人關於任何本申請書內的資料改動；及
 - 在合理情況下為受託人提供一切所需資料及協助，為使受託人能履行其強積金法例下的責任。
 (c) 若本人違反履行本計劃之承諾，而受託人給予三個月之預先書面通知，本人同意及允許本計劃之受託人終止本人參與此計劃。

I confirm that I have read and understood the AIA Personal Information Collection Statement ("AIA PIC"). I declare and agree that any personal data and other information relating to me or my policy(ies) or investments contained in this application or collected, obtained, compiled or held by the Trustee by any means from time to time may be collected and utilized in accordance with the AIA PIC. I acknowledge and consent to the transfer of my personal data outside of Hong Kong for the purposes and to the types of transferees as set out in the AIA PIC.

I confirm that I have read and understood the AIA PIC. I agree to the provision and use of my personal data for direct marketing purposes in accordance with the AIA PIC.

I acknowledge and consent to the transfer of my personal data outside of Hong Kong for direct marketing purposes and to the types of transferees as set out in the AIA PIC.

本人確認本人已閱讀及明白友邦保險收集個人資料聲明(「收集個人資料聲明」)。本人聲明及同意在本申請書所載或受託人不時以任何方式收集所得、編製或持有的任何個人資料及關於本人或本人的保單或投資的其他資料，可根據收集個人資料聲明收集及使用。本人確認及同意就收集個人資料聲明所述目的轉移本人的個人資料至香港境外及轉移予收集個人資料聲明所載的資料承辦人。本人確認本人已閱讀及明白收集個人資料聲明。本人同意提供本人的個人資料以用於收集個人資料聲明所述直接促銷目的。本人確認及同意就收集個人資料聲明所述直接促銷目的轉移本人的個人資料至香港境外及轉移予收集個人資料聲明所載的資料承辦人。

Please tick the box on the left if you do not agree with the provision, use and transfer of your personal data for direct marketing purposes in accordance with the AIA PIC. If you do not tick the box on the left, you are deemed to have given your consent for the provision, use and transfer of your personal data for direct marketing purposes. 如果閣下不同意根據友邦保險收集個人資料聲明提供、使用及轉移閣下的個人資料作直接促銷目的，請在左邊方格內加上 號。如閣下並沒有在左邊方格內加上 號，閣下便視作同意提供、使用及轉移閣下的個人資料作直接促銷目的。

I further declare and confirm that all of the information provided by me to the Trustee in this form is true and correct including the Hong Kong Identity Card/Passport number stated in this form. I agree to be bound by any instructions sent to the Trustee under my name and signature. I further agree to indemnify and keep the Trustee indemnified against any and all losses, costs, liabilities, expenses, actions, proceedings required by the Trustee as a result of any inaccurate information provided by me and/or upon the Trustee's execution of any of my instructions except where there is proven willful default, gross negligence or fraud on the part of the Trustee.

Acceptance of this application by the Trustee is subject to: (a) satisfactory completion of all relevant sections in this application form; (b) receipt of all relevant documents required by the Trustee; and (c) issuance of Notice of Acceptance from the Trustee.

本人並謹此聲明及確認，本人在此申請書上提供予受託人之所有資料，包括在此申請書上所示之香港身份證/護照號碼均為正確無誤。本人同意及接受以本人名義及簽署致受託人之任何指示的束。除因受託人被證明故意失責、嚴重疏忽或欺詐外，倘若本人所填報之資料錯誤及/或受託人因執行本人之任何指示，而導致受託人需要承擔任何損失、責任、支出，或需要進行任何行動或訴訟，本人同意作出有關賠償予受託人。

受託人將根據下列各項以確認接受本申請：(a) 適當地填妥本申請書內所有有關部分；(b) 受託人收受所有所需文件；及(c) 由受託人發出之確認函。

I declare that: (please select (a) OR (b) and ✓ as appropriate; if no selection is made, we will assume that you HAVE NOT been invited, induced or advised by any registered MPF intermediaries) 本人聲明：(請選擇(a) 或 (b)，並於適當方格內填上 號；如果沒有選擇，我們將假設閣下未獲任何註冊強積金中介人邀請、誘使或建議。)

(a) I HAVE NOT been invited, induced or advised by any registered MPF intermediaries to enrol in the AIA MPF schemes. 本人未獲任何註冊強積金中介人邀請、誘使或建議參加友邦強積金計劃。

(b) I have been invited, induced or advised by one or more registered MPF intermediaries to enrol in the AIA MPF schemes. 本人獲註冊強積金中介人邀請、誘使或建議參加友邦強積金計劃。

I acknowledge that I have received and read the Principal Brochure (including fees and charges, information about Principal and Subsidiary Intermediary) and Member's Guide/Happy Retirement Savings Program leaflet/AIA MPF Personal Account leaflet applicable to the Scheme. 本人確認已收受及閱讀本計劃之主要說明書(包括收費、主事及附屬中介人資料)及成員資料冊/退休樂單張/休咗樂單張。

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

- Schemes and fund choices 計劃及基金選擇 Fund management fees 基金管理費
 Member services 成員服務 Other, please specify 其他，請註明：_____

I hereby confirm that the sales process does not involve: (i) any claims that the Scheme/constituent fund under the Scheme is preferred over the scheme/fund I participated/invested in; (ii) any advice, invitation or inducement relating to choosing a particular constituent fund. 本人謹此確認在銷售過程中，並無涉及：(i) 任何就本計劃/本計劃內成分基金優於本人正參與/投資的計劃/基金之聲言；(ii) 任何與選擇特定成分基金相關的意見、邀約或誘使。

Pursuant to section 34ZL of the Mandatory Provident Fund Schemes Ordinance, I declare that: **(please select (a) OR (b) and ✓ as appropriate)** 根據《強制性公積金計劃條例》第34ZL條，本人聲明：**(請選擇(a) 或 (b)，並於適當方格內填上 號)**

(a) I AM NOT visually or otherwise impaired and/or my education level IS NOT primary or below such that I can make a key decision* independently. 本人並非視障或有其他障礙及/或本人的教育程度並非為小學或以下，本人能夠自行作出重要決定*。

(b) I am visually or otherwise impaired and/or my education level is primary or below such that I cannot make a key decision* independently, and **(please ✓ the appropriate box)** 本人因視障或其他障礙及/或本人的教育程度為小學或以下，本人無法自行作出重要決定* **(請於適當方格內填上 號)**

- I would not like to be accompanied by a witness during the sales process. 本人不願意銷售過程由見證人陪同。 **OR 或**
 I would like to be accompanied by the following witness during the sales process: **(please ✓ the appropriate box)** 本人願意銷售過程由以下見證人陪同：**(請於適當方格內填上 號)**
 my companion. 本人的同伴。 **OR 或** another intermediary or member of staff (i.e. a third party). 另一名中介人或員工(即第三者)。

Name of witness 見證人姓名

Signature of witness 見證人簽署

Date 日期 (ccyy 年 / mm 月 / dd 日)

* As defined in the MPF legislation, it refers to: (i) choosing a particular constituent fund; (ii) making a transfer that would involve a transfer out of a guaranteed fund; (iii) making an early withdrawal of accrued benefits from the MPF system; or (iv) making voluntary contributions into a particular registered scheme/constituent fund. 根據強積金法例的定義，指(i) 選擇一項特定成分基金；(ii) 進行涉及轉移一項保證基金的權益轉移；(iii) 提早從強積金制度中提取累積權益；或(iv) 向一個/項特定註冊計劃/成分基金作自願性供款。

Note: If you are not an existing member of any one of the AIA MPF schemes (including Happy Retirement Savings Program/AIA MPF Personal Account), AIA ORSO schemes and/or AIA Macau Retirement Fund Services, we will send your initial Interactive Website login password to the Home or Correspondence Address as provided in this form. If you are an existing member, please use your current passwords to access the Interactive Website and Interactive Voice Response System under this scheme. If you want to (i) stop using the login service for our Interactive Website; or (ii) get your initial Interactive Voice Response System login password, please contact our Member Hotline at (852) 2200 6288.

注意：若閣下非任何一個友邦強積金計劃(包括退休樂或休咗樂)、友邦職業退休金計劃及/或澳門友邦保險退休金服務之現有成員，我們會將閣下互動網頁之首次登入個人密碼郵寄至載於本表格上的住宅或通訊地址。若閣下為現有成員，請沿用現有密碼以登入本計劃之互動網頁及互動語音回應系統。若閣下欲(i)終止使用互動網頁之登入服務；或(ii)索取閣下互動語音回應系統之首次登入個人密碼，請致電我們的成員熱線(852)2200 6288。

Print Name 姓名：_____

Date 日期：_____

Signature 簽署

(ccyy 年 / mm 月 / dd 日)

The completed application form and enclosures should be sent to an authorized intermediary or directly to AIA Company (Trustee) Limited at 1/F, AIA Building, 1 Stubbs Road, Hong Kong. 填妥之申請書及附件請交回認可中介人或寄回友邦(信託)有限公司，地址為香港司徒拔道1號友邦大廈1樓。

Remark: Please note that any bank or transaction charges incurred will be borne by you.

備註：閣下須支付所有之銀行或交易手續費。

For Intermediary Use	Agent 1 Name :	Agent 2 Name :
	MPF Card No. :	MPF Card No. :
Received date/time :	Tel. No. :	Tel. No. :
	Agency Code 1 : _____	Agency Code 2 : _____
	Agent Code 1 : _____	Agent Code 2 : _____
	Consultant 1 : _____	Consultant 2 : _____
Source of Business :	<input type="checkbox"/> 1-Direct <input type="checkbox"/> 2-GMD <input type="checkbox"/> 3-Broker <input type="checkbox"/> 4-Agent <input type="checkbox"/> 5-CKW <input type="checkbox"/> 6-FB <input type="checkbox"/> 7-BOA <input type="checkbox"/> K-Bank <input type="checkbox"/> Z-Others <input type="checkbox"/> A-JF	
Cheque No. :	Amount HK\$:	
<input type="checkbox"/> This applicant is an intermediary of AIA 此申請人乃友邦保險之中介人		
For Internal Use	Commission Rule :	PH052
Staff Name :	Staff Code :	Business Group: _____

AIA PERSONAL INFORMATION COLLECTION STATEMENT

Among the most important assets of the AIA Group of companies is the trust and confidence placed to properly handle information. Customers expect us to maintain their information accurately, protected against manipulation and errors, secure from theft and free from unwarranted disclosure.

This statement provides you with notice as to why your personal data is collected, how it is intended to be used, to whom your personal data may be provided to and how to access, review and amend your personal data.

The AIA Group of companies recognizes its responsibilities in relation to the collection, holding, processing or use of personal data. The provision of your personal data is voluntary; you may choose not to provide us with the requested data, but failure to do so may inhibit our ability to do business with you.

Why we collect your personal data and how it may be used?

Personal data is collected for the following purposes:

- processing, administering, implementing and effecting the requests or transactions contemplated in this document or any other documents you may submit to us from time to time;
- designing new or enhancing existing products and services provided by us;
- to communicate with you including to send you administrative communications about any account you may have with us or about future changes to this Personal Information Collection ("PIC") statement;
- for statistical or actuarial research undertaken by AIA Group of companies, the financial services industry or our respective regulators;
- for our data matching, internal business and administrative purposes;
- to assist in law enforcement purposes, investigations by police or other government authorities and to meet requirement imposed by law;
- other purposes directly relating to any of the above.

For our policy on using your personal data for promotional or marketing purposes, please see the section entitled "Use of Personal Data for Direct Marketing Purposes".

Who may be provided with your personal data?

Personal data will be kept confidential but may, where such disclosure is necessary to satisfy the purpose or a directly related purpose for which the personal data was collected, provide such personal data to the following parties (for our policy on sharing of your personal data for promotional and marketing purposes, please see the section entitled "Use of Personal Data for Direct Marketing Purposes"):

- any person authorized to act as an agent of an AIA Group member company for the distribution of products and services offered by that AIA Group member company;
- any agent, contractor or third party service provider (within or outside the AIA Group of companies) who provides administration, data processing, telecommunications, computer, payment, debt collection or securities clearing, technology outsourcing, call center services, mailing and printing services in connection with the operation of the AIA Group member company's business and provision of our services to you;
- any member of the AIA Group of companies, including subsidiaries and affiliates;
- agents, contractors or third party service providers (within or outside the AIA Group of companies) including companies to help deliver our services, such as reinsurance companies, investment management companies, claims investigation companies, industry associations or federations;
- other companies who help gather your information or communicate with you, such as research companies and ratings agencies, in order to enhance the services we provide to you; and
- government or regulatory bodies or any person to whom the AIA Group member company is under an obligation to make disclosure under the legal and regulatory obligations in that jurisdiction applicable to that particular AIA Group member company.

In relation to any personal data collected by us whilst providing any services in respect of our mandatory provident fund master trust schemes, such personal data would only be transferred to the above parties for the purpose of providing any mandatory provident fund related services.

From time to time, we may purchase a business or sell one or more of our businesses (or portions thereof) and your personal data may be transferred or disclosed as a part of the purchase or sale or a proposed purchase or sale. In the event that we purchase a business, the personal data received with that business would be treated in accordance with this PIC, if it is practicable and permissible to do so. In the event that we sell a business, we will include provisions in the selling contract requiring the purchaser to treat your personal data in the same manner required by this PIC statement.

Your personal data may be provided to any of the above parties who may be located in Hong Kong or outside of Hong Kong.

Access Rights to Personal Data

You have the right to:

- verify whether an AIA Group member company holds any personal data about you and to access any such data;
- require the AIA Group member company to correct any personal data relating to you which is inaccurate; and
- ascertain the AIA Group member company's policies and practices in relation to personal data.

Requests for access, correction or other queries relating to your personal data should be addressed to:

The Data Protection Officer
AIA Pension and Trustee Co. Ltd.
1/F, AIA Building
1 Stubbs Road
Hong Kong
Tel: (852) 2200 6288
Fax: (852) 2565 0001
E-mail: hkmfp.customer@aia.com (MPF)
hkorso.customer@aia.com (ORSO)

The AIA Group member company has the right to charge costs which are directly related to and necessary for the processing of any personal data access request.

Use of Personal Data for Direct Marketing purposes

As well as the purposes set out above, the AIA Group of companies intends to use your name and contact details for promotional or marketing purposes including sending you promotional materials and conducting direct marketing in relation to the following products, services, advice and subjects: insurance; annuities; mandatory provident fund schemes/occupational retirement schemes; wealth management; investment; banking; financial services; credit cards; medical/health treatment; educational; recruitment; training; reward/loyalty/privilege programmes; charitable/non-profitable causes; ("Classes of Marketing Subjects"). However, in relation to any personal data collected by the AIA Group of companies whilst providing any services in respect of our mandatory provident fund master trust schemes, such personal data would only be used for promoting or marketing any products or services that are directly related to our mandatory provident fund schemes.

For the purposes of direct marketing, we may provide your personal information (with the exception of any personal data collected by the AIA Group of companies whilst providing any services in respect of our mandatory provident fund master trust schemes) to providers (whether within or outside of the AIA Group of companies) of any of the Classes of Marketing Subjects described above and call centre, marketing or research services so that they can send you promotional materials and conduct direct marketing in relation to the products and services they offer (these materials may be sent to you by postal mail, email or other means). We may provide your personal data to providers (whether within or outside of the AIA Group of companies) of any of the Classes of Marketing Subjects for gain.

Before using or providing your personal data for the purposes and to the transferees set out above, we must obtain your written consent, and only after having obtained such written consent, may use and provide your personal data for any promotional or marketing purpose.

The types of personal data that AIA intends to use and provide for direct marketing purposes as described above are your name and contact details.

You may in future withdraw your consent to the use and provision to a third party by the AIA Group member company of your personal data for direct marketing purposes and thereafter the AIA Group member company shall cease to use such data for direct marketing purposes.

If you wish to withdraw your consent, please inform us by writing to the address in the section on "Access Rights to Personal Data" or sending us an email. Any such request should clearly state details of the personal data in respect of which the request is being made.

Amendments to this PIC Statement

The AIA Group of companies reserves the right, at any time and without notice, to add to, change, update or modify this PIC statement, simply by notifying you of such change, update or modification. If we decide to change our personal data policy, those changes will be notified to you either on our website or in writing so that you are always aware of what information we collect, how we use the information and under what circumstances the information is disclosed. Any such change, update or modification will be effective immediately upon posting.

Additional Information

Should you have any questions on any part of this PIC statement or would like additional information regarding the AIA Group of companies data privacy practices, please do not hesitate to contact us.

友邦保險收集個人資料聲明

友邦保險集團公司其中一項最重要的資產，就是客戶對我們能妥善處理資料而給予的信任及信賴。客戶期望我們能準確保存他們的資料、保障資料免被竊取及出錯、防止被盜用及未經授權下被公開。

本聲明旨在向閣下闡釋收集閣下個人資料的原因、資料的擬定用途、可能獲提供閣下資料的有關方，以及有關查閱、檢視及更正閣下個人資料的方法。

友邦保險集團公司深明其收集、持有、處理或使用個人資料的責任。提供閣下的個人資料與否純屬閣下個人意願，閣下可選擇不向我們提供我們所需的個人資料，惟這樣可能導致我們無法辦理閣下的業務。

我們為何要收集閣下的個人資料及將如何使用有關資料？

收集個人資料乃作以下用途：

- 處理、實施、執行和實行本文件或閣下可能不時呈交予我們的任何其他文件項下的要求或交易；
- 設計全新或加強現時我們所提供的產品及服務；
- 與閣下保持聯繫，包括向閣下寄發有關閣下在我們公司任何帳戶的行政管理通訊或本收集個人資料聲明之日後變動；
- 供友邦保險集團公司、金融服務業或我們的相關監管機構的統計或精算研究之用；
- 供我們資料核對，內部業務及行政之用；
- 協助執行法例、警方或其他政府或監管機構調查，以及符合法例規定，或以符合與政府或監管機構之協定；
- 與上述任何一項直接有關的其他用途。

有關我們使用閣下個人資料作宣傳或市場推廣用途的政策，請參閱「使用個人資料作直接促銷用途」一節。

誰會取得閣下的個人資料？

個人資料將保密處理，惟倘就符合收集個人資料用途或直接相關用途而披露屬必須時，則可向以下各方提供相關個人資料（有關我們分發閣下個人資料作宣傳或市場推廣用途的政策，請參閱「使用個人資料作直接促銷用途」一節）：

- 獲授權擔任友邦保險集團成員公司代理以分銷該友邦保險集團成員公司所提供之產品及服務的任何人士；
- 就友邦保險集團成員公司營運以及向閣下提供我們的服務相關而提供管理、數據處理、電話、電腦、付款、收債或證券結算、技術外判、電話中心服務、郵寄及印刷服務的任何代理、承包商或第三方服務供應商（無論在友邦保險集團公司範圍內或外）；
- 友邦保險集團任何成員公司，包括附屬公司及關聯公司；
- 代理、承包商或第三方服務供應商（無論在友邦保險集團公司範圍內或外），包括協助提供服務的公司，例如再保險公司、投資管理公司、索賠調查公司、業界協會或聯盟；
- 協助收集閣下資料或與閣下聯繫的其他公司，如研究調查公司及信貸評級機構，藉以加強我們向閣下所提供的服務；及
- 政府或監管機構或在友邦保險集團成員公司營運所屬司法權區：(a) 對該友邦保險集團成員公司具有法律及或監管責任而須予以披露的任何人士；(b) 與該友邦保險集團成員公司協議需對其作出披露的任何人士。

我們因在提供強積金集成信託計劃服務而收集的個人資料，該等個人資料只我們會提供予上述人士作提供相關的強積金服務的用途。

我們可不時購買業務或出售我們一項或多項業務（或其部分），而閣下的個人資料可作為該買賣或建議買賣的一部分予以轉讓或披露。倘我們購買一項業務，就該業務所獲得的個人資料將在其可行及允許的情況下根據本收集個人資料聲明處理。倘我們出售一項業務，我們將於出售合約中訂明買方須按本收集個人資料聲明所載相同方式處理閣下的個人資料。

閣下的個人資料可提供予上述在香港境內或香港境外的任何有關方。

查閱個人資料的權利

閣下有權：

- 核實友邦保險集團成員公司是否有閣下的個人資料，並查閱任何該等資料；
- 要求友邦保險集團成員公司更正任何有關閣下的錯誤個人資料；及
- 確定友邦保險集團成員公司有關個人資料的政策及慣例。

如欲查閱、更正閣下個人資料或有相關的其他要求，可致函至以下地址：

資料保障主任
友邦退休金管理及信託有限公司
香港司徒拔道1號友邦大廈1樓
電話：(852) 2200 6288
傳真：(852) 2565 0001
電郵：hkmfp.customer@aia.com (強積金)
hkorso.customer@aia.com (公積金)

友邦保險集團成員公司亦會就因處理任何查閱個人資料的要求收取需要和直接相關的費用。

使用個人資料作直接促銷用途

除上述用途外，友邦保險集團公司擬使用閣下的姓名和聯絡資料作宣傳或市場推廣用途，包括向閣下寄發宣傳資料及就以下產品、服務、建議、目的作直接促銷：保險；年金；強積金/職業退休計劃；財富管理；投資；銀行；金融服務；信用卡；醫療/健康治療；教育；招聘；訓練；獎賞/年資獎勵/優惠計劃；慈善/非牟利用途（「促銷類別」）。然而，我們因在提供強積金集成信託計劃服務而收集的個人資料，該等個人資料只會用作宣傳或推廣直接與強積金計劃相關的產品或服務。

就此直接促銷的用途，除因友邦保險集團公司在提供強積金集成信託計劃服務所收集的個人資料外，我們或會將閣下的個人資料提供予任何上述描述的促銷類別以及電話中心、市場推廣或研究服務的提供者（無論在友邦保險集團公司範圍內或外），從而他們可就其所提供的產品及服務向閣下寄發宣傳資料及進行直接促銷，有關資料可透過郵寄、電郵或其他方式送達予閣下。我們或會將閣下的個人資料提供予任何以上描述的促銷類別的提供者（無論在友邦保險集團公司範圍內或外）而獲得利益。

就上述用途使用或向上述受讓方提供閣下的個人資料前，我們必先取得閣下的書面同意，並僅會在取得有關書面同意後方就任何宣傳或市場推廣用途使用或提供閣下的個人資料。

友邦保險集團擬使用及提供作上述直接促銷用途的個人資料為閣下的姓名和聯絡資料。

閣下將來可就友邦保險集團成員公司使用並向第三者提供閣下的個人資料作直接促銷用途撤回以上的同意；此後，友邦保險集團成員公司須停止使用該等資料作直接促銷之用。

如閣下欲撤回以上同意，閣下可以書面或電郵方式通知我們，書面通知可郵寄至「查閱個人資料的權利」一節所載地址。任何有關請求應清楚列明該要求相關的個人資料詳情。

本收集個人資料聲明的修訂

友邦保險集團公司保留權利可隨時且在無須通知的情況下增添、修改、更新或修訂本收集個人資料聲明，我們僅知會閣下有相關修改、更新或修訂。倘我們決定修改我們的個人資料政策，我們將於我們的網站或以書面形式知會閣下有關修改，從而讓閣下能得悉我們所收集的資料、我們如何使用該資料及在何種情況下會披露該資料。任何有關修改、更新或修訂將在刊登後即時生效。

其他資料

如閣下對本收集個人資料聲明的任何部分有任何疑問或如欲知悉有關友邦保險集團公司的資料保密慣例的更多資料，請隨時與我們聯絡。