



AIA Pension and Trustee Co. Ltd.

(Incorporated in the British Virgin Islands
with limited liability)

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MPF.AIA.COM.HK (MPF)
RETIREMENT.AIA.COM.HK (ORSO)

MPF

**NOTES TO TRANSFER BENEFITS BY SCHEME MEMBER
(For self-employed person, personal account holder or employee ceasing employment)**

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

(1) **Definition of terms:**

- (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 or by a self-employed person.
- (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(M) 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(M) will be the same as the original scheme.

- (2) 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.
- (3) 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.
- (4) If you wish to transfer-out the accrued benefits from more than one accounts, you should submit a separate Form MPF(S)-P(M) for each of those accounts.
- (5) If you wish to transfer-out the accrued benefits from your contribution account during employment, you should complete Form MPF(S)-P(P).
- (6) For each account, a scheme member should transfer the 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) Please complete Form MPF(S)-P(M) carefully as the administration procedures taken by the trustees may not be reversible.
- (8) If any information provided on Form MPF(S)-P(M) (including the signature) is incorrect or incomplete, the trustees may not be able to process your benefit transfer request.
- (9) Information about the new scheme is set out in the offering document of 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) 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: (852) 2918 0102.
- (11) Please complete Form MPF(S)-P(M) at Page 1 to Page 3 and submit it (excluding the Explanatory Notes) to the new trustee after completion.

~END~

計劃成員轉移權益須知
(適用於自僱人士、個人賬戶持有人或終止受僱的僱員)

填寫第MPF(S)-P(M)號表格前，請先閱讀下列重要資料：

(1) **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）或自僱人士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，在第MPF(S)-P(M)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，在第MPF(S)-P(M)號表格所述的新計劃將與原計劃相同。
- (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。
- (3) 請確保你在新計劃已開立個人賬戶或供款賬戶。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。
- (4) 如欲從多於一個賬戶轉出累算權益，請就每個賬戶分別提交一份第MPF(S)-P(M)號表格。
- (5) 如欲在現職期間從你的供款賬戶轉出累算權益，請填寫第MPF(S)-P(P)號表格。
- (6) 就每一個賬戶，除了由自願性供款所產生的累算權益或可根據原計劃管限規則選擇提取外，計劃成員應把賬戶內的所有累算權益整筆轉移。
- (7) 請小心填寫第MPF(S)-P(M)號表格，因為受託人未必能夠撤銷已採取的行政步驟。
- (8) 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。
- (9) 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。
- (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：(852) 2918 0102。
- (11) 請填妥載於第1頁至第3頁的第MPF(S)-P(M)號表格，並提交該表格〔「填報須知」毋須提交〕予新受託人。

~完~



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FORM MPF(S)-P(M)
第 MPF(S)-P(M)號表格

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 Notes to Transfer Benefits by Scheme Member on page 1 and Explanatory Notes on page 4 carefully before completing this Form. 填報本申請表前，請先細讀第 i i 頁之計劃成員轉移權益須知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」。

SCHEME MEMBER'S REQUEST FOR FUND TRANSFER FORM

計劃成員資金轉移申請表

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

(適用於自僱人士、個人賬戶持有人或終止受僱的僱員)

Sections 145, 146, 147, 148 and 149 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 145、146、147、148 及 149 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成上述目的，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 – SCHEME MEMBER'S DETAILS

第 I 部 – 計劃成員資料

- (1) Name of the Scheme Member (same as that shown on your Hong Kong Identity (HKID) Card ^{Note 1})
計劃成員姓名（與香港身份證上的姓名相同 ^{註 1}）: _____
- (2) Identification of the Scheme Member 計劃成員身份證明:
(a) HKID Card Number 香港身份證號碼: _____
(b) Passport Number 護照號碼: _____
(ONLY for member without HKID Card 本欄僅供沒有香港身份證的成員填寫)
- (3) Telephone No. 電話號碼: (a) Day Time 日間電話: _____ (b) Mobile 流動電話: _____
Email Address (If any) 電郵地址 (如有): _____
- (4) Correspondence Address 通訊地址:
- | | | | |
|------------------------|------------|--|--------------------------|
| Flat / Room
單位/室 | Floor
樓 | Block
座數 | Name of building
大廈名稱 |
| Street no.
街道號碼 | | | Name of street
街道名稱 |
| Name of district
區域 | | Hong Kong / Kowloon / N.T.*
香港/九龍/新界* | |

SECTION II – FUND TRANSFER INFORMATION

第 II 部 – 資金轉移資料

- (5) MPF account information in the original scheme 原計劃的強積金賬戶資料:
Name of Original Trustee ^{Note 2} 原受託人名稱 ^{註 2}: _____
Name of Original Scheme ^{Note 2} 原計劃名稱 ^{註 2}: _____
Type of MPF Account (Please select ONE of the following accounts and ✓ as appropriate)
強積金賬戶類別 (請選擇以下其中一個賬戶並在適當方格內加上✓號):
 Personal Account 個人賬戶 OR 或 Contribution Account 供款賬戶
Scheme Member's Account Number ^{Note 2} 計劃成員賬戶編號 ^{註 2}: _____
- (6) (a) Details of Personal Account (**applicable for Personal Account Holder**) 個人賬戶詳情 (**適用於個人賬戶持有人**):
Plan Number ^{Note 2} 計劃編號 ^{註 2}: _____
(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)
- (b) Details of Contribution Account (**applicable for employee who wishes to transfer-out the accrued benefits from a contribution account after cessation of employment**) 供款賬戶詳情 (**適用於僱員在終止受僱後欲把供款賬戶內的累算權益轉出**):
Name of Former Employer (if any) 前任僱主名稱 (如有): _____
Employer's Identification Number ^{Note 2 & 3} 僱主識別號碼 ^{註 2 及 3}: _____
- (7) Details of self-employed status (**applicable for self-employed person only**) 自僱人士身份詳情 (**只適用於自僱人士**)
Please indicate your reason of transfer and ✓ as appropriate. 請說明你轉移的原因，並於適當方格內填上✓號:
 Cessation of self-employment, with effect from 終止自僱，生效日期是: _____ (ccyy/mm/dd 年/月/日)
 I will remain in self-employment and my accrued benefits will be transferred to another MPF scheme stated in section III(8).
Contributions to the original scheme should be paid up to: 本人將會維持自僱，並把本人的累算權益轉移至第 III (8) 部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: _____ (ccyy/mm/dd 年/月/日)

SECTION III – FUND TRANSFER OPTIONS

第 III 部 – 轉移資金的選擇

(8) MPF account information in the new scheme 新計劃的強積金賬戶資料:

I elect to transfer the accrued benefits derived from the mandatory contributions in my account stated in section II(5) to the following account (Please select option (a),(b) OR (c) and ✓ as appropriate):

本人選擇把在第 II (5) 部所述賬戶內由強制性供款所產生的累算權益轉移至以下賬戶 (請選擇(a), (b) 或 (c), 並於適當方格內填上✓號) :

<input type="checkbox"/> (a) To my contribution account with my new employer 轉移至本人新僱主就本人開立的供款賬戶 Name of New Trustee ^{Note 4} 新受託人名稱 ^{註 4} : _____ Name of New Scheme ^{Note 4} 新計劃名稱 ^{註 4} : _____ Scheme Member's Account Number ^{Note 4} 計劃成員賬戶編號 ^{註 4} : _____ Name of New Employer 新僱主名稱: _____ Employer's Identification Number ^{Note 3 & 4} 僱主識別號碼 ^{註 3 及 4} : _____
<input type="checkbox"/> (b) To my designated account in the new scheme 轉移至本人新計劃內的指定賬戶 Name of New Trustee ^{Note 4} 新受託人名稱 ^{註 4} : _____ Name of New Scheme ^{Note 4} 新計劃名稱 ^{註 4} : _____ Scheme Member's Account Number ^{Note 4} 計劃成員賬戶編號 ^{註 4} : _____ Plan Number ^{Note 4} 計劃編號 ^{註 4} : _____ (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)
<input type="checkbox"/> (c) Retained in the original scheme as personal account (where applicable) 以個人賬戶形式保留在原計劃 (如適用)

Please note: 1. For transfer of accrued benefits within the same Master Trust Scheme, unless there is an offset of Severance Payment / Long Service Payment in which part or whole of fund holding attributable to employer's contribution may be redeemed, Member's total fund holding will not be redeemed and will be directly transferred to the designated account for continuous investment.

2. If no transfer option is being selected, the accrued benefits will be retained in the Personal Account of the current scheme.

請注意: 1. 就轉移累算權益到同一集成信託計劃, 除非僱主供款之部分或全部權益/基金單位可能會被贖回用以抵銷遣散費/長期服務金, 否則成員持有之總權益/基金單位將不會被贖回, 並會直接轉移到指定之賬戶繼續投資。

2. 如成員沒有作出選擇, 其累算權益將會保留在現有計劃之個人賬戶內。

(9) Arrangement of my voluntary contributions ^{Note 5} (if any) in my account stated in section II(5).

有關本人在第 II (5) 部所述賬戶內的自願性供款 ^{註 5} (如有) 的安排。

Please select option (a) OR (b) and ✓ as appropriate. 請選擇 (a) 或 (b), 並於適當方格內填上✓號

(Remarks: If you do not select any options but there are accrued benefits derived from voluntary contributions, those benefits will be handled in the same way as those stated in section III(8). If there are no such benefits in your account and you have made an election in section III(9), the selected option will not be processed.)

(備註: 如你沒有作出任何選擇, 而賬戶內有由自願性供款產生的累算權益, 則該等權益將以處理第 III (8) 部的權益的同樣方式處理。如你已在第 III (9) 部作出選擇, 而賬戶內並沒有該等權益, 則有關選擇將不會獲處理。)

<input type="checkbox"/> (a) Transferred together with the accrued benefits derived from the mandatory contributions as in section III(8). 與在第 III (8) 部所述由強制性供款所產生的累算權益一併轉移
<input type="checkbox"/> (b) 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 Method of payment (please ✓ as appropriate): 付款方式 (請在適當方格內填上✓號): (i) <input type="checkbox"/> By cheque 支票付款 (ii) <input type="checkbox"/> By depositing directly in a bank account under the name of scheme member only (a bank account under the name of a third party is not applicable). (This option is applicable only to trustees who provide such services and there may be handling fee from trustees and bank charges involved. Please check with the original trustee for details.) 直接存入只以計劃成員名義開立的銀行賬戶 (不適用於以第三者名義開立的銀行賬戶)。(這項選擇只適用於有提供此項服務的受託人, 並且受託人及銀行可能會因此而收取費用。詳情請向原受託人查詢。) Name of bank account holder: 銀行賬戶持有人姓名: _____ Name of bank: 銀行名稱: _____ Bank account number: 銀行賬戶號碼: _____

SECTION IV – TERMINATION OF MPF ACCOUNT WITH NO RESIDUAL BALANCE (IF APPLICABLE)**第 IV 部 – 終止沒有剩餘款項的強積金賬戶（如適用）**

- (10) I hereby give the original trustee an instruction to terminate my relevant MPF member account as referred to in section II(5) upon transfer of the full accrued 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第 II (5) 部所述的強積金成員賬戶內的所有累算權益轉移至新受託人後，以及在該賬戶內並無剩餘款項的情況下，終止該強積金成員賬戶。

SECTION V – AUTHORIZATION AND DECLARATION**第 V 部 – 授權及聲明**

- (11) 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；
- (12) I declare that 本人聲明：
(a) I have read the Notes to Transfer Benefits by Scheme Member; and
本人已閱讀《計劃成員轉移權益須知》；及
(b) 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。

Information / Advice relating to transfer of benefits to the AIA MPF Scheme(s) 有關轉移權益至友邦強積金計劃之資訊 / 意見

- (13) **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 transfer to the AIA MPF Scheme(s).
本人未獲任何註冊強積金中介人邀請、誘使或建議轉移至友邦強積金計劃。

OR 或

(b) I have been invited, induced or advised by one or more registered MPF intermediaries to transfer to the AIA MPF Scheme(s).
本人獲註冊強積金中介人邀請、誘使或建議轉移至友邦強積金計劃。

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 New Scheme and, if applicable, the Guide to Transfer Benefits Under Employee Choice Arrangement.
本人確認已收妥及閱讀新計劃之主要說明書(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/休樂單張及「僱員自選安排」權益轉移指南(如適用)。

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

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

I declare that I fully understand the information provided and discussed, including the rationale underlying the advice relating to transfer of benefits to the AIA MPF Scheme(s). 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，包括有關轉移權益至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 New Scheme/constituent fund under the New 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) 任何就新計劃/新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。

Clients with special needs 需要特別照顧的客戶

- (14) 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*。

OR 或

(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算權益；或 (iv) 向一個/項特定註冊計劃/成分基金作自願性供款。

Signature of the Scheme Member ^{Note 6}
計劃成員簽署 ^{註 6}

Date (ccyy/mm/dd)
日期 (年/月/日)

For Intermediary Use

Intermediary/ Agent Code : _____ Agency Code : _____

Intermediary/ Agent Name : _____ Staff code/ Name : _____ Received date & time : _____

ccyy / mm / dd

By completing the intermediary information, I confirm that I have witnessed the signature and verified the original HKID card/ Passport copy of the member as stated on the document attached to this transfer application (if applicable).



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

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(852) 2200 6288 (Member)
F: (852) 2565 0001

MPF.AIA.COM.HK (MPF)
RETIREMENT.AIA.COM.HK (ORSO)

SIGNATURE VERIFICATION

簽名核實證明文件

(Only applicable for transfer request form submitted through intermediaries)

(只適用於經中介人遞交之轉移申請表)

New Plan No.

Member Account No.

新計劃編號： _____

成員賬戶編號： _____

Declaration聲明

I, _____ **[Member Name]**, holder of HKID Card / Passport no. _____, confirm that the Hong Kong Identity Card/Passport provided is a copy of the original and my signature is my own signature. I request the trustee of any Mandatory Provident Fund (MPF) schemes in which I am a member to process the transfer application(s) submitted together with this document. I agree and understand that my signature provided here would be used for the current application(s) only and would not change any of my signature record which I have provided to the MPF trustees previously.

本人 _____ [成員姓名], 持有香港身份證/護照號碼 _____, 確認在此提供的香港身份證/護照是原件的副本, 而簽名是本人的簽名。本人要求任何本人作為強制性公積金計劃 (強積金) 成員的受託人處理與這信件一同遞交的轉移申請。本人同意及明白在此提供的簽名將僅用於目前的轉移申請, 而並不會更改任何本人過去曾經提供強積金受託人的簽名記錄。

成員簽署

Please paste your HKID Card / Passport copy here
請在此貼上香港身份證 / 護照副本

Explanatory Notes on Scheme Member's Request for Fund Transfer Form [Form MPF(S)-P(M)]

- (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 the original scheme, type of MPF account, the plan number, the name of your former 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) Please note that the transfer request may not be processed if the name of the new trustee, the name of the new scheme, your scheme member's account number, the employer's identification number or the plan number in the 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.

- (5) 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.
- (6) 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~

計劃成員資金轉移申請表 [第 MPF(S)-P(M) 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、強積金賬戶類別、計劃編號、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) 請注意，如你沒有提供新受託人名稱、新計劃名稱、新計劃成員賬戶編號、新僱主識別號碼或新計劃編號，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：
 - (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。

- (5) 計劃成員可在原受託人向成員發出的周年權益報表上，獲知其現有強積金賬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。
- (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。

~ 完 ~