



APPLICATION FOR MEMBERSHIP - PERSONAL ACCOUNT MEMBER

會員申請表 - 個人賬戶會員

To: AXA China Region Trustees Limited ("Trustee"), Trustee of the AXA MPF - Smart Plan ("the Plan")

致: 安盛信託有限公司(「受託人」), AXA 強積金 - 明智之選(「本計劃」)的受託人

I hereby apply for membership of the AXA MPF - Smart Plan on the terms and conditions of the trust deed of the Plan.

本人謹此根據本計劃信託契約的條款及條件申請成為 AXA 強積金 - 明智之選的會員。

Scheme no. (For office use only)

計劃編號 (公司專用) : 0 8 3 7 3 7 3 0 0 4 G R

Section A Applicant's Information

甲部 申請人資料

(1) HKID card no. or Passport no. (for non-HKID card holders 只適用於非香港身份證持有人)
香港身份證號碼 () 或 護照號碼

(2) Applicant's name
(as appeared in HKID card) English 英文
Surname
.....
Given Name
申請人姓名
(請用香港身份證所載之姓名) Chinese 中文
姓 名

(3) Sex Male Female
性別 男性 女性

(4) Date of birth
出生日期 Y年 M月 D日

(5) Residential address (in English)
住址 (請以英文填寫)
Flat / Room 室 Floor 樓層 Block 座
.....
Name of Building 大廈名稱
.....
Street No. 街/道號碼 Name of Street 街/道名稱
.....
Name of District 區 Hong Kong 香港 Kowloon 九龍 N.T. 新界 Others 其他

(6) Contact details
聯絡資料

(a) Mobile phone no.#
流動電話號碼

(b) Tel no.
電話號碼

(c) E-mail address#
電子郵件

(d) Fax no.
傳真號碼

With the above information provided, you can receive MPF information or relevant services via email/SMS for free.

如提供上述資料, 您可透過電郵或短訊免費收取強積金資訊或有關服務。

Note: If you have benefits to be transferred from other scheme, please complete the Scheme Member Request For Fund Transfer Form [Form MPF(S) - P(M)].

注意: 如有從其他計劃轉入權益, 請另行填寫計劃成員資金轉移申請表 [第 MPF(S) - P(M) 號表格]。

Section B Investment Mandate

乙部 投資授權書

(for amounts relating to Mandatory Contributions, Voluntary Contributions and benefits transferred from other scheme, other than amounts transferred within AXA MPF - Smart Plan)

(適用於強制性供款、自願性供款及從其他計劃轉入權益的有關款項, 在AXA強積金 - 明智之選內轉移之款項除外)

Name of Constituent Fund 成分基金名稱	Fund Code 基金代號	Employer Contribution ^(Note 1) 僱主供款部份	Member Contribution 會員供款部份	
AXA MPF Conservative Fund AXA 強積金保守基金	CAP			(1) For amount relating to Employer Contribution, a member may invest in any Constituent Funds with a minimum of 5% in each selected Constituent Fund. 會員可將僱主供款部份的款項投資於任何成分基金, 而每項成分基金之最低百分比為5%。
AXA Cash Fund AXA 流動基金	CAS			
AXA Guaranteed Fund* AXA 保證基金*	GUA			
AXA Stable Fund AXA 平穩基金	STA			(2) For amount relating to Member Contribution, a member may invest in any Constituent Funds with a minimum of 5% in each selected Constituent Fund. 會員可將會員供款部份的款項投資於任何成分基金, 而每項成分基金之最低百分比為5%。
AXA Balanced Fund AXA 均衡基金	BAL			
AXA Growth Fund AXA 增長基金	GRO			
AXA - Fidelity Global Equity Fund AXA - 富達環球股票基金	TOP			(3) The specified percentage should be in whole number. 所填寫之百分比必須為整數。
AXA - RCM Hong Kong Fund AXA - RCM 香港基金	SHK			
AXA - Fidelity Asia Pacific Equity Fund AXA - 富達亞太股票基金	SAP			
AXA - Templeton Japan Equity Fund AXA - 鄧普頓日本股票基金	SJE			(4) The contribution percentage must add up to 100% for Employer and Member Contribution respectively. 僱主及會員供款分配率之總和分別須等於百分之一百。
AXA - Templeton Global Bond Fund AXA - 鄧普頓環球債券基金	SGB			
AXA - JPMorgan Greater China Equity Fund AXA - 摩根大中華股票基金	JGC			
AXA - JPMorgan Asian Bond Fund AXA - 摩根亞洲債券基金	JAB			
Total 合共		100%	100%	

Note for Section B: If you leave either column blank or has not given an instruction according to 1-4 in Section B, your instruction will be considered invalid, unclear, incomplete instructions. In this case or amendments which are not properly initiated in respect of all or any percentage of Employer and/or Member Contribution, the Trustee will invest such amounts with missing and/or incomplete instructions (net of charges) in the default fund designated by the Trustee with the agreement of the Sponsor from time to time - currently the AXA MPF Conservative Fund, if you would like to change the investment mandate or switch out the accrued benefits invested in the default fund to other fund(s), please complete and submit the 'Change In Investment Form'. Amounts transferred within AXA MPF - Smart Plan will be processed by unit transfer, any units invested in Constituent Fund(s) immediately before the transfer will continue to be invested in the same Constituent Fund(s) under the new account.

乙部注意事項：如你未有在僱主及/或會員供款部份填寫指示或未有依照乙部事項1-4填寫此部份，你的指示將視為不清晰、不符合規定。在此情況或於刪改處沒有簽署作實，受託人將把有關沒有註明供款分配率及/或指示不清晰的款項（扣除收費後）投資於受託人不時獲得保薦人同意指定的預定基金（現為AXA強積金保守基金），若閣下欲更改投資授權或將已投資於預定基金的累算權益轉移至其他基金，請另填交『投資更改表格』。在AXA強積金-明智之選內轉移之款項將以轉移基金單位方式進行，所有轉移前已投資之成分基金單位將繼續投資於新賬戶內之相同成分基金。

Note 1: Applicable to accrued benefits derived from Employer Contribution transferred from other scheme. As accrued benefits in another MPF account (which may include employer contribution) may be transferred to this account, please fill in the "Employer Contribution" column whether or not you have any accrued benefits arising from employer contributions at this moment. All accrued benefits arising from employer contribution set up now or in future will be invested in accordance with this allocation instruction or any "Employer Contribution" instruction given in future.

註 1: 適用於由其他計劃轉入本計劃的僱主供款累算權益，由於累算權益可能由其他強積金戶口轉入此戶口（當中可能包含僱主供款部份），故無論閣下現在是否有由僱主供款產生的累算權益，仍請填寫『僱主供款部份』一欄，安盛將會根據此欄的指示或任何將來作出的『僱主供款部份』的指示對現在或將來由僱主供款產生的累算權益進行投資。

* Note for AXA Guaranteed Fund:

AXA Guaranteed Fund ("Fund") is a non-unitized fund and the return of which is based on the Declared Crediting Rate. For the latest Declared Crediting Rate, please visit our website or call our Customer Service Hotline. The guarantee of the AXA Guaranteed Fund Policy, in which the AXA Guaranteed Fund of the AXA MPF - Smart Plan invests, is given by AXA China Region Insurance Company (Bermuda) Limited ("the Sponsor"). The guarantee applies in specified circumstances only. Upon realisation of investment in this fund other than under the guarantee conditions, the proceeds of realisation are subject to a reduction by the Sponsor of a certain percentage of the member's account balance (or the relevant part of the account balance). The rate of reduction is determined by the Sponsor at its sole discretion and can be changed by the Sponsor at any time. The current maximum rate of reduction is 5%. Subject to the approval of the Mandatory Provident Fund Schemes Authority (Authority), the maximum rate may be increased. For the current rate of reduction, please call our Customer Service Hotline. Please refer to Section 5.1(6) of the offering document of AXA MPF - Smart Plan for details of the credit risk, guarantee features and guarantee conditions, particularly examples on how the guarantee works.

*AXA保證基金註釋：

AXA 保證基金（「本基金」）乃非單位化的基金，其回報是按公佈之年利率計算。有關最新公佈之年利率，請瀏覽我們的網頁或致電客戶服務熱線查詢。AXA 強積金-明智之選內的 AXA 保證基金所投資的 AXA 保證基金保單之保證由安盛保險（百慕達）有限公司（「保薦人」）所提供。此項保證只適用於特定情況。在保證條件以外的情況變現此基金的單位時，變現該等投資的收益將會受制於保薦人的扣減。此扣減將相等於會員的賬戶結餘（或賬戶結餘之有關部分）之若干百分比。扣減比率由保薦人全權決定並可隨時更改。現時扣減比率最高為 5%，而此最高比率經強制性公積金計劃管理局（「積金局」）批准可定為更高之百分比。有關現時之減少數額之百分比，請致電客戶服務熱線查詢。有關信用風險、保證特點及保證條件的詳情，特別是有關保證運作的例子，請參閱 AXA 強積金-明智之選說明書的 5.1(6) 部分。

Declaration

聲明

I understand that I will become a Member of the Plan on the date to be determined by the Trustee upon its acceptance of my enrolment under the Plan.

I undertake and agree to do the following:

- (1) do all things necessary and supply such information to the Trustee as it shall require to facilitate the administration of the Plan;
- (2) read the offering document;
- (3) pay the relevant fees and charges under the Plan;
- (4) have the Initial Charges deduct from, or pay the Initial Charges in addition to, the Contributions and where relevant benefits transferred from another scheme (to the extent allowed by the MPF Ordinance);
- (5) be bound by the terms and conditions of the trust deed of the Plan and the relevant Participation Agreement as amended from time to time;
- (6) accept responsibility for the Investment Mandate as specified by me on this form and acknowledge that the Trustee shall not be liable for any loss resulting from any Investment Mandate given by me.

I declare that:

- (1) all information provided by me in this document together with any subsequent updated information to be provided :
 - (a) is true, accurate and complete;
 - (b) may be used, stored, disclosed and transferred (in and outside the Hong Kong Special Administrative Region) to such person as the Trustee or any service provider may consider necessary from time to time, including delegates, regulators and government bodies in any jurisdiction and any entity of the AXA Group for any purposes in connection with processing of this document, administering and servicing of your mandatory provident fund (MPF) products and services, promoting and providing MPF related products and services offered by any entity of the AXA Group, and/or in connection with matching for whatever purpose with other personal data concerning the Employer and Members, and/or for the purpose of complying with the laws of any applicable jurisdiction;
- (2) I understand that failure to provide any information requested herein may result in the Trustee's inability to process my request;
- (3) I understand that I have a right to request access to and correction of any inaccuracies in the personal data and request that such data not be used for direct marketing purposes. Any such requests can be made in writing and addressed to Data Privacy Officer of AXA China Region Trustees Limited, Gloucester Road P.O. Box 28148, Wan Chai, Hong Kong.

本人明白本人將於受託人接納此會員申請表後由受託人所決定的日期成為本計劃的會員。

本人接受及同意進行以下事項：

- (1) 按受託人的要求而作出所需事項及提供所需資料，以協助本計劃的行政管理；
- (2) 細閱說明書；
- (3) 支付本計劃有關費用及收費；
- (4) 將首次收費從供款及其他計劃轉入的權益（如有）中扣除（於強積金條例許可的情況下）；
- (5) 受本計劃的信託契約及有關的參加同意書內的條款及條件（及其不時作出的修訂）約束；
- (6) 承擔本人在本表格所作的投資授權書之責任，並確認受託人毋須對本人所作的任何投資授權書而引致的任何損失承擔責任。

本人聲明：

- (1) 本人在本文件提供的所有資料連同任何隨後提供的更新資料：—
 - (a) 均為真確、確實及完全；
 - (b) 可使用、貯存、披露及轉移至受託人或任何服務供應商按不時之考慮認為有需要之人士（在香港特別行政區境內或境外），包括受委託之公司、任何司法管轄的監管機構和政府機關、及 AXA 安盛集團內任何機構，用作處理本文件及提供強積金產品管理及服務，推廣及提供 AXA 安盛集團內任何機構有關強積金的產品及服務，及/或用作核對相關僱主及會員之個人資料，及/或用作遵守任何適用司法管轄區的法律之用途；
- (2) 本人明白若未能提供此處所要求的任何資料，可導致受託人不能處理本人的要求；
- (3) 本人明白本人有權要求查閱個人資料及修改任何不正確之處，並要求有關資料不能用作直接銷售用途。任何有關要求須致函香港灣仔告士打道郵政信箱 28148 號安盛信託有限公司私隱資料主任收。

Signature of Applicant

申請人簽署

Date

日期

This form is issued and shall be read in conjunction with the offering document. 本表格與說明書一併發出，並應與說明書一併細閱。

Terms defined in the trust deed of the Plan shall have the same meanings when used in this form. 在本計劃的信託契約中定義的詞語，如在本表格中使用應具相同涵義。

(To be completed by MPF Intermediary 由強積金中介人填寫)

Type 類別	<input type="checkbox"/> Agent 營業員	<input type="checkbox"/> Others 其他
Agent/Broker/IFA Code 營業員/經紀/理財顧問公司編號	_____	
MPF Intermediary Details 強積金中介人資料	_____	
Name 姓名	Signature 簽署	
Contact Phone No. 聯絡電話	Individual Sales Code (For IFA only) 個人理財顧問編號 (只適用於理財顧問公司)	

Please send the completed form to: AXA Pension Administrator - BestServe Financial Limited

Postal Address: Gloucester Road P.O. Box 28148, Wan Chai, Hong Kong

Customer Service Hotline (852) 2802 2812 Employer Hotline (852) 2519 1188 Fax (852) 3183 2168 Website www.axa.com.hk

請郵寄本表格至: AXA 退休計劃行政管理人 - 卓譽金融服務有限公司

郵遞地址: 香港灣仔告士打道郵政信箱 28148 號

客戶服務熱線 (852) 2802 2812 僱主專線 (852) 2519 1188 傳真 (852) 3183 2168 網址 www.axa.com.hk



SCHEME MEMBER'S REQUEST FOR FUND TRANSFER FORM
(For self-employed person, personal account holder or employee ceasing employment)

計劃會員資金轉移申請表

(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

NOTES 注意：

- (a) Please read the Notes to Transfer Benefits by Scheme Member and Explanatory Notes carefully before completing this Form. 填寫本表格前，請先細閱計劃會員轉移權益須知及填報須知。
- (b) Please use BLOCK LETTERS to complete this Form. 請用正楷填寫本表格。
- (c) *means delete whichever is inappropriate. Please insert "N.A." if not applicable. *請刪去不適用者。請在不適用處填上「不適用」。
- (d) 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. 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。
- (e) 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. 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。
- (f) Please submit another notice to new/original trustee for any request(s) other than the purpose of this Form separately. 請就本表格以外之要求，分別向新/原受託人另行提交通知。

Section I Scheme Member's Details

第I部 計劃會員資料

(1) Name (same as that shown on your Hong Kong Identity (HKID) Card ^{Note 1}) 姓名(與香港身份證上的姓名相同 ^{註1})

English 英文

Surname 姓氏

Other Name 名字

Chinese 中文

Surname 姓氏

Other Name 名字

(2) HKID Card No.

香港身份證號碼

Passport No. **

護照號碼**

(3) Contact Details #

聯絡資料*

Home No.

住宅電話

Fax No.

傳真號碼

Mobile/Pager No.

手提電話/傳呼機號碼

Email Address (if any)

電郵地址(如有)

(4) Correspondence Address #

通訊地址*

Flat / Room 室

Floor 樓層

Block 座

Building 大廈

Estate 屋邨

Street No. 街道號碼

Street 街道

* Hong Kong / Kowloon / N.T. / Others (please specify)

* 香港/九龍/新界/其他(請註明)

District / Country (if not Hong Kong) 地區/國家名稱(如非香港地區)

++ Passport No. is applicable ONLY for member without HKID Card 護照號碼僅供沒有香港身份證的會員填寫

If information provided is different from that under trustee's record, such information will be updated to the relevant record accordingly. 如提供之資料與受託人之紀錄不相同，此資料會被更新於有關紀錄內。

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：

(Please choose ONE of the following by ticking the corresponding box) (請選擇下列其中一項並於相關的方格內加上「✓」號)

Name of original trustee ^{Note 2} 原受託人名稱 ^{註2}

AXA China Region Trustees Limited 安盛信託有限公司

Others, please specify 其他，請註明

Name of original scheme ^{Note 2} 原計劃名稱 ^{註2}

(Please choose ONE of the following by ticking the corresponding box) (請選擇下列其中一項並於相關的方格內加上「✓」號)

AXA MPF - Smart Plan AXA 強積金 - 明智之選

AXA MPF - Simple Plan AXA 強積金 - 易富之選

Others, please specify 其他，請註明

Type of MPF account 強積金賬戶類別

(Please select ONE of the following accounts and "✓" as appropriate) (請選擇以下其中一個賬戶並於適當方格內填上「✓」號)

Personal account 個人賬戶

OR 或

Contribution account 供款賬戶

Scheme member's account number ^{Note 2}

計劃會員賬戶號碼 ^{註2}

- (6) Details of former employment 以往受僱詳情 (applicable for employee who wishes to transfer-out the accrued benefits from a contribution account after cessation of employment): (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 前任僱主名稱 :
Employer's identification number^{Note 3} 僱主識別號碼^{註3} :

- (7) Details of self-employed status 自僱人士身份詳情 (applicable for self-employed person only) (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：

DD 日 MM 月 YYYY 年

- 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 部第(8)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：

DD 日 MM 月 YYYY 年

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: 本人選擇把在第II部第(5)項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：

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

- (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}

(Please choose ONE of the following by ticking the corresponding box) (請選擇下列其中一項並於相關的方格內加上「✓」號)

AXA China Region Trustees Limited 安盛信託有限公司

Others, please specify 其他，請註明

Name of new scheme^{Note 4} 新計劃名稱^{註4}

(Please choose ONE of the following by ticking the corresponding box) (請選擇下列其中一項並於相關的方格內加上「✓」號)

AXA MPF - Smart Plan AXA 強積金 - 明智之選 AXA MPF - Simple Plan AXA 強積金 - 易富之選

Others, please specify 其他，請註明

Scheme member's account number^{Note 4} 計劃會員賬戶號碼^{註4}

Name of new employer 新僱主名稱

Employer's identification number^{Note 3} 僱主識別號碼^{註3}

- (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}

(Please choose ONE of the following by ticking the corresponding box) (請選擇下列其中一項並於相關的方格內加上「✓」號)

AXA China Region Trustees Limited 安盛信託有限公司

Others, please specify 其他，請註明

Name of new scheme^{Note 4} 新計劃名稱^{註4}

(Please choose ONE of the following by ticking the corresponding box) (請選擇下列其中一項並於相關的方格內加上「✓」號)

AXA MPF - Smart Plan AXA 強積金 - 明智之選 AXA MPF - Simple Plan AXA 強積金 - 易富之選

Others, please specify 其他，請註明

Scheme member's account number^{Note 4} 計劃會員賬戶號碼^{註4}

- (c) Retained in the original scheme as personal account 以個人賬戶形式保留在原計劃 (where applicable 如適用)

- (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部第(5)項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部第(8)項的權益的同樣方式處理。如你已在第III部第(9)項作出選擇，而賬戶內並沒有該等權益，則有關選擇將不會獲處理。)

- (a) Transferred together with the accrued benefits derived from the mandatory contributions as in Section III (8). 與在第III部第(8)項所述由強制性供款所產生的累算權益一併轉移。

- (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) By cheque 支票付款

(ii) 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 bank charges involved. Please check with the original trustee for details.) 直接存入只以計劃會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 銀行名稱 :

Name of bank account holder 銀行賬戶持有人姓名 :

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部第(5)項所述的強積金會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，終止該強積金會員賬戶。

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; 本人已閱讀《計劃會員權益轉移須知》的內容；
- (b) all information provided by me in this document together with any subsequent updated information to be provided: - 本人在本文件提供的所有資料連同任何隨後提供的更新資料：—
- (i) is true, accurate and complete; 均為真確、確實及完全；
- (ii) may be used, stored, disclosed and transferred (in and outside the Hong Kong Special Administrative Region) to such person as the Trustee or any service provider may consider necessary from time to time, including delegates, regulators and government bodies in any jurisdiction and any entity of the AXA Group for any purposes in connection with processing of this document, administering and servicing of your mandatory provident fund (MPF) products and services, promoting and providing MPF related products and services offered by any entity of the AXA Group, and/or in connection with matching for whatever purpose with other personal data concerning the Employer and Members, and/or for the purpose of complying with the laws of any applicable jurisdiction; 可使用、貯存、披露及轉移至受託人或任何服務供應商按不時之考慮認為有需要之人士（在香港特別行政區境內或境外），包括受委託之公司、任何司法管轄的監管機構和政府機關、及AXA安盛集團內任何機構，用作處理本文件及提供強積金產品管理及服務，推廣及提供AXA安盛集團內任何機構有關強積金的產品及服務，及/或用作核對相關僱主及會員之個人資料，及/或用作遵守任何適用司法管轄區的法律之用途；
- (c) I understand that failure to provide any information requested herein may result in the Trustee's inability to process my request; and 本人明白若未能提供此處所要求的任何資料，可導致受託人不能處理本人的要求；及
- (d) I understand that I have a right to request access to and correction of any inaccuracies in the personal data and request that such data not be used for direct marketing purposes. Any such requests can be made in writing and addressed to Data Privacy Officer of AXA China Region Trustees Limited, Gloucester Road P. O. Box 28148, Wan Chai, Hong Kong. 本人明白本人有權要求查閱個人資料及修改任何不正確之處，並要求有關資料不能用作直接銷售用途。任何有關要求須致函香港灣仔告士打道郵政信箱28148號安盛信託有限公司私隱資料主任收。

Signature of the scheme member ^{Note 6} 計劃會員簽署 ^{註6}
(It must be the same as your previous specimen submitted to the original trustee)
(此簽署須與你之前遞交予原受託人的式樣相同)

Date
日期

For transferring of accrued benefits to your account with AXA MPF – Smart Plan/AXA MPF – Simple Plan, please forward this Form at Page 1 to 3 and submit it (excluding the Notes to Transfer Benefits by Scheme Member and Explanatory Notes) to AXA Pension Administrator – BestServe Financial Limited, Gloucester Road P.O. Box 28148, Wan Chai, Hong Kong. Otherwise, please forward this Form to the trustee of the new scheme as completed above. 如欲轉移累算權益至閣下於AXA強積金 - 明智之選 / AXA強積金 - 易富之選之供款賬戶，請填妥第1至3頁（「計劃會員權益轉移須知」及「填報須知」除外），並把此表格交予AXA退休計劃行政管理人 - 卓譽金融服務有限公司，香港灣仔告士打道郵政信箱 28148號。否則，請把此表格交予以上填寫之新計劃受託人。

[This page is blank. Please complete Form MPF(S)-P(M) at page 1 to page 3 and submit it (excluding the Notes to Transfer Benefits by Scheme Member and Explanatory Notes) to the new trustee after completion]

【此乃空白頁。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（「計劃會員轉移權益須知」及「填報須知」除外）予新受託人。】

Please read the following important information before you complete this Form (MPF(S)-P(M)). 填寫本表格 (MPF(S)-P(M))前，請先閱讀下列重要資料。

(1) Definition of Terms 用詞定義：

- (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. 「供款賬戶」 – 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) "Personal account" – an account in an MPF scheme which is mainly used to receive the accrued benefits transferred from another account(s). 「個人賬戶」 – 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) "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. 「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。
- (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. 「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) "Original scheme" – the MPF scheme from which your accrued benefits are to be transferred. 「原計劃」 – 指轉出你的累算權益的強積金計劃。
- (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. 「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) 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. 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。

Note for AXA Guaranteed Fund AXA 保證基金註釋：

AXA Guaranteed Fund ("Fund") is a non-unitized fund and the return of which is based on the Declared Crediting Rate. For the latest Declared Crediting Rate, please visit our website or call our Customer Service Hotline. The guarantee of the AXA Guaranteed Fund Policy, in which the AXA Guaranteed Fund of the AXA MPF - Smart Plan invests, is given by AXA China Region Insurance Company (Bermuda) Limited ("the Sponsor"). The guarantee applies in specified circumstances only. Upon realisation of investment in this fund other than under the guarantee conditions, the proceeds of realisation are subject to a reduction by the Sponsor of a certain percentage of the member's account balance (or the relevant part of the account balance). The rate of reduction is determined by the Sponsor at its sole discretion and can be changed by the Sponsor at any time. The current maximum rate of reduction is 5%. Subject to the approval of the Mandatory Provident Fund Schemes Authority (Authority), the maximum rate may be increased. For the current rate of reduction, please call our Customer Service Hotline. Please refer to Section 5.1(6) of the offering document of AXA MPF - Smart Plan for details of the credit risk, guarantee features and guarantee conditions, particularly examples on how the guarantee works. AXA 保證基金 (「本基金」) 乃非單位化的基金，其回報是按公佈之年利率計算。有關最新公佈之年利率，請瀏覽我們的網頁或致電客戶服務熱線查詢。AXA 強積金-明智之選內的 AXA 保證基金所投資的 AXA 保證基金單單之保證由安盛保險(百慕達)有限公司(「保薦人」)所提供。此項保證只適用於特定情況。在保證條件以外的情況變現此基金的單位時，變現該等投資的收益將會受制於保薦人的扣減。此扣減將相等於會員的賬戶結餘 (或賬戶結餘之有關部分) 之若干百分比。扣減比率由保薦人全權決定並可隨時更改。現時扣減比率最高為 5%，而此最高比率經強制性公積金計劃管理局 (「積金局」) 批准可定為更高之百分比。有關現時的減少數額之百分比，請致電客戶服務熱線查詢。有關信用風險、保證特點及保證條件的詳情，特別是有關保證運作之例子，請參閱 AXA 強積金-明智之選說明書的 5.1(6)部分。

- (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. 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) 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. 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) If you wish to transfer-out the accrued benefits from your contribution account during employment, you should complete Form MPF(S)-P(P). 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) 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. 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，計劃會員應把賬戶內的所有累算權益整筆轉移。
- (7) Please complete Form MPF(S)-P(M) carefully as the administration procedures taken by the trustees may not be reversible. 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) 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. 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) 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. 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) 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. 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。

- (1) If you do **NOT** possess a HKID Card, please fill in your name as shown on your passport. 如你**沒有**香港身份證，請填上你在護照上的姓名。
- (2) 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: 請注意，如你沒有提供原受託人名稱、原計劃名稱、原計劃會員賬戶號碼、強積金賬戶類別、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。你可透過以下途徑獲取有關資料：
- (a) in your membership certificate; 會員證明書；
 - (b) in your annual benefit statement; or 周年權益報表；或
 - (c) through the member enquiry facilities available from trustees. 受託人提供的會員查詢服務。

If you are in doubt, please contact your original trustee or your employer. 如有疑問，請聯絡你的原受託人或僱主。

- (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. 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會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) 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: 請注意，如你沒有提供新受託人名稱、新計劃名稱或新計劃會員賬戶號碼，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：
- (a) in your membership certificate; 會員證明書；
 - (b) in your annual benefit statement; or 周年權益報表；或
 - (c) through the member enquiry facilities available from trustees. 受託人提供的會員查詢服務。

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

- (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. 計劃會員可在原受託人向會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。會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) 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. 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。

~ END 完 ~

Date:

AXA China Region Trustees Ltd.
20/F, AXA Centre, 151 Gloucester Rd.
Wanchai, Hong Kong

Attn: MPF & Pensions Admin. Department

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

MPF Scheme Name

- AXA MPF – Simple Plan
 AXA MPF – Smart Plan

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：

安盛信託有限公司
香港灣仔告士打道
一百五十一號安盛中心 20 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 AXA 強積金 - 易富之選
 AXA 強積金 - 明智之選

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)

Date:

AXA China Region Trustees Ltd.
20/F, AXA Centre, 151 Gloucester Rd.
Wanchai, Hong Kong

Attn: MPF & Pensions Admin. Department

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

MPF Scheme Name

- AXA MPF – Simple Plan
 AXA MPF – Smart Plan

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：

安盛信託有限公司
香港灣仔告士打道
一百五十一號安盛中心 20 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 AXA 強積金 - 易富之選
 AXA 強積金 - 明智之選

個人帳戶編號

自僱人士計劃編號

僱主計劃編號

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此致

簽署 (公司蓋印，如適用)