



NOTES TO TRANSFER BENEFITS BY SCHEME MEMBER

計劃成員轉移權益須知

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

(適用於自僱人士、個人帳戶持有人或終止受僱的僱員)

Please read the following important information before you complete Form MPF(S)-P(M). 填寫第 MPF(S)-P(M) 號表格前，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.

「供款帳戶」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帳戶。

- (b) “Personal account” - an account in an MPF scheme which is mainly used to receive the accrued benefits transferred from another account(s).

「個人帳戶」一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。

- (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」）一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」）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帳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」一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」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帳戶，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。

- (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。
- (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。
- (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帳戶轉出累算權益，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.
就每一個帳戶，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，計劃成員應把帳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。

~END~

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中國人壽信託有限公司
CHINA LIFE TRUSTEES LIMITED

Address : 20th Floor, CLI Building, 313 Hennessy Road, Wanchai, Hong Kong
地址 : 香港灣仔軒尼詩道 313 號中國人壽大廈 20 字樓

Tel : 3999 5555 Fax : 2893 2103
電話 : 3999 5555 傳真 : 2893 2103

SCHEME MEMBER'S REQUEST FOR FUND TRANSFER FORM
計劃成員資金轉移申請表

Form 表格:
MPF(S) - P(M)

(for self-employed person, personal account holder or employee ceasing employment)
(適用於自僱人士、個人帳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

- (a) *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」。
- (b) 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。
- (c) 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。

SECTION I - SCHEME MEMBER'S DETAILS 第 I 部 — 計劃成員資料

- (1) Name 姓名 : (a) Surname 姓氏 : _____
(same as that shown on your Hong Kong Identity (HKID) Card ^{Note 1}) (與香港身份證上的姓名相同 ^{註 1}) (b) Other Name 名字 : _____
- (2) Identification 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) Contact details 聯絡資料 : (a) Daytime contact number 日間聯絡電話號碼 : _____
(b) Mobile phone number 手提電話號碼 : _____
(c) 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
Street no. 街道號碼		Street 街道	
District 地區		* Hong Kong 香港 / Kowloon 九龍 / N.T. 新界 / Others (please specify) 其他 (請注明)	

SECTION II - FUND TRANSFER INFORMATION 第 II 部－資金轉移資料

- (5) MPF account information in the original scheme 原計劃的強積金帳戶資料：

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)

強積金帳戶類別（請選擇以下其中一個帳戶並於適當方格內填上✓號）：

☐ Personal account

個人帳戶

OR

或

☐ Contribution account

供款帳戶

Scheme member's account number^{Note 2}

計劃成員帳戶號碼^{註 2}：

- (6) Details of former employment (*applicable for employee who wishes to transfer-out the accrued benefits from a contribution account after cessation of employment*):

以往受僱詳情（適用於僱員在終止受僱後欲把供款帳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} 僱主的識別號碼^{註 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：

日	月	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(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：

日	月	年

SECTION III - FUND TRANSFER OPTIONS 第 III 部 — 轉移資金的選擇

- (8) MPF account information in the new scheme 新計劃的強積金帳戶資料：
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)部所述帳戶內由強制性供款所產生的累算權益轉移至以下帳戶（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帳戶

Name of new trustee ^{Note 4} 新受託人名稱 ^{註 4} ：	China Life Trustees Limited 中國人壽信託有限公司
Name of new scheme ^{Note 4} 新計劃名稱 ^{註 4} ：	China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃
Scheme member's account number ^{Note 4} 計劃成員帳戶號碼 ^{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帳戶

Name of new trustee ^{Note 4} 新受託人名稱 ^{註 4} ：	China Life Trustees Limited 中國人壽信託有限公司
Name of new scheme ^{Note 4} 新計劃名稱 ^{註 4} ：	China Life MPF Master Trust Scheme 中國人壽強積金集成信託計劃
Scheme member's account number ^{Note 4} 計劃成員帳戶號碼 ^{註 4} ：	

☐ (c) Retained in the original scheme as personal account (where applicable)

以個人帳戶形式保留在原計劃（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(5)部所述帳戶內的自願性供款^{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，而帳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，而帳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(8)部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.) 直接存入只以計劃成員名義開立的銀行帳戶（不適用於以第三者名義開立的銀行帳戶）。（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 account holder

銀行帳戶持有人姓名：

Name of bank:

銀行名稱：

Bank account number:

銀行帳戶號碼：

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帳戶（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帳戶內的所有累算權益轉移至新受託人後，以及在該帳戶內並無剩餘款項的情況下，終止該強積金成員帳戶。

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》的內容；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。

Signature of the scheme member^{Note 6}

計劃成員簽署^{註 6}

Date

日期

Agent Name and Code 代理人名稱及編號:	
MPF Intermediaries 中介人編號:	

***Explanatory Notes* 填報須知**

- (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。你可透過以下途徑獲取有關資料：
- (a) in your membership certificate 成員證明書；
 - (b) in your annual benefit statement; or 周年權益報表；或
 - (c) through the member enquiry facilities available from trustees 受託人提供的成員查詢服務。

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) 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：
- (a) in your membership certificate 成員證明書；
 - (b) in your annual benefit statement; or 周年權益報表；或
 - (c) through the member enquiry facilities available from trustees 受託人提供的成員查詢服務。

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。

- (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。

- (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~

China Life Trustees Limited
Room 2002, 20/F, CLI Building
313 Hennessy Road
Wan Chai, Hong Kong

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

☐ Personal Account No. _____

☐ Self-Employed Scheme No. _____

☐ Employer Scheme No. _____

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)

中國人壽信託有限公司
香港灣仔軒尼詩道三百一十三號
中國人壽大廈二十樓二零零二室

要求更換服務代理/服務代理人委任書

強積金計劃名稱 中國人壽強積金集成信託計劃

☐ 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
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此致

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