

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

Note 注意

- Please read the explanatory notes carefully before completing this form. 填寫此表格前，請先細閱填報須知。
- Please complete this form in BLOCK LETTER. 請以正楷填寫本表格。
- Upon completion of this form, scheme member may give this form to (excluding the Explanatory Notes): 計劃成員填妥本表格後，可把表格交回(「填報須知」無須提交)：
 - Original Trustee 原受託人 : For election to have the benefits retained in the current master trust scheme or industry scheme. 適用於把權益保留在現行集成信託計劃或行業計劃的選擇。
 - New Employer 新僱主 : For election to have the benefits transferred to the contribution account in which the new employer is participating. The new employer should then give written notice of the election to the new trustee concerned. 適用於把權益轉移至新僱主參與的供款帳戶內的選擇。新僱主隨後應給予有關新受託人該選擇的書面通知。
 - New Trustee 新受託人 : For election to have the benefits transferred to another master trust scheme or industry scheme elected by the scheme member. 適用於把權益轉移至計劃成員選擇的另一集成信託計劃或行業計劃的選擇。
- If you would like to withdraw the accrued benefits in your "Easy Gold Plan" account, please complete and return the "Request for Withdrawal Form (For "Easy Gold Plan")" ("the Form") to instruct the handling of your contributions made under "Easy Gold Plan". If we do not receive the Form upon transfer of your accrued benefits, your contributions made under "Easy Gold Plan" will be transferred to / retained in the personal account under the existing scheme. 如欲提取「積·金·易」帳戶內的累算權益，請填寫並交回「提取表格(「積·金·易」適用)」以指示如何處理您的「積·金·易」供款。若本公司於轉移您的累算權益時尚未收到該表格，您的「積·金·易」供款將被轉移 / 保留於現有計劃之個人帳戶內。
- Definition of terms is provided at Note 2. 用詞定義載於註2。
- Please mark "✓" in the appropriate box. 請於適用的方格內填上"✓"號。
- Please countersign any alterations made in this form. 如須作出任何刪改，請於刪改之位置旁簽署。

| Part I. Details of The Scheme Member 計劃成員資料 | | | | |
|--|---|--|-------------------|------------|
| Name of Plan 計劃名稱 | <input type="checkbox"/> BCT (MPF) Pro Choice BCT 積金之選 <input type="checkbox"/> BCT (MPF) Industry Choice BCT(強積金)行業計劃 | | | |
| Name of Member 成員姓名 (Same as that shown on your HKID Card ^{Note 3}) (與香港身份證上的姓名相同 ^{註3}) | English (Mr / Ms / Mrs*) | HKID Card No. 香港身份證號碼 | | |
| | 中文 (先生 / 小姐 / 女士*) | Passport No. (<i>ONLY</i> for member without HKID Card) 護照號碼(本欄僅供沒有香港身份證的成員填寫) | | |
| Telephone No. 電話號碼 | Country Code 國家號碼 | Area Code 地區號碼 | Phone No. 電話號碼 | Ext. 內線 |
| Local Mobile 本地手提 | | | | |
| Business 辦公室 | | | | |
| Residential 住宅 | | | | |
| Other Contact No. 其他聯絡號碼 | | | | |
| E-mail Address 電郵地址 | | | | |
| Correspondence Address (all correspondence will be sent to the following address) 通訊地址(所有通訊將寄往以下地址) | | | | |

| Part II. Fund Transfer Information 資金轉移資料 | |
|---|---|
| A. MPF account information in the Original Scheme ^{Note 4} 原計劃的強積金帳戶資料 ^{註4} | |
| Name of Original Trustee ^{Note 4} 原受託人名稱 ^{註4} | |
| Name of Original Scheme ^{Note 4} 原計劃名稱 ^{註4} | |
| 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)： | |
| <input type="checkbox"/> Personal Account 個人帳戶 | OR 或 <input type="checkbox"/> Contribution Account 供款帳戶 |
| Scheme Member's Account No. ^{Note 4} 計劃成員帳戶號碼 ^{註4} | |

* Delete as appropriate 請刪去不適用者

B. 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 No. ^{Note 5} (Participating Plan No.) 僱主的識別號碼 ^{註5} (參與計劃編號) | |

C. 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: 請說明您轉移的原因, 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 Part III. 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 部份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 |

Part III. Fund Transfer Options ^{Note 6} 轉移資金的選擇 ^{註6}**Important Note 重要提示**

Item (1) below is required information for processing your instruction. 下列第(1)項必須填寫, 否則將無法處理有關指示。

(1) MPF account information in the New Scheme ^{Note 7} 新計劃的強積金帳戶資料 ^{註7}

I elect to have the accrued benefits derived from mandatory contributions in my account stated in Part IIA above transferred as follows:

本人選擇把以上第 IIA 部份所註明的本人帳戶內由強制性供款所衍生的累算權益作出以下的轉移安排:

- (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 7} 新受託人名稱 ^{註7} _____
- Name of New Scheme ^{Note 7} 新計劃名稱 ^{註7} _____
- Scheme Member's Account No. ^{Note 7} 計劃成員帳戶號碼 ^{註7} _____
- Name of New Employer 新僱主名稱 _____
- Employer's Identification No. ^{Note 5} (Participating Plan No.) 僱主的識別號碼 ^{註5} (參與計劃編號) _____
- (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 7} 新受託人名稱 ^{註7} _____
- Name of New Scheme ^{Note 7} 新計劃名稱 ^{註7} _____
- Scheme Member's Account No. ^{Note 7} 計劃成員帳戶號碼 ^{註7} _____
- (c) **Retain in the original scheme as personal account (if applicable)** 以個人帳戶形式保留在原計劃(如適用)

(2) Arrangement of my voluntary contributions ^{Note 8} (if any) in my account stated in Part IIA.有關本人在第 IIA 部份所述帳戶內的自願性供款 ^{註8} (如有) 的安排。

I elect to have the accrued benefits derived from voluntary contributions to be:

本人選擇把由自願性供款所衍生的累算權益作出以下的安排:

- (a) transferred with my contributions made under "Easy Gold Plan" (if any) to an "Easy Gold Plan" account under a personal account with the same scheme (Only applicable to age 65 or above)
連同「積·金·易」(如有)轉移至現有計劃的個人帳戶下之「積·金·易」戶口內(只適用於年滿65歲)
- (b) handled in the same way as those derived from mandatory contributions
以處理強制性供款所衍生的累算權益的同樣方式處理
- (c) withdrawn in accordance with the governing rules of the scheme
根據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):

- By cheque
支票付款
- 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 銀行名稱 _____
- Bank Account No. 銀行帳戶號碼 _____
- Name of Bank Account Holder 銀行帳戶持有人姓名 _____

I attach a photocopy of my HKID Card / Passport* for verification of the HKID Card / Passport* No. so that I do not need to present my HKID Card / Passport* in person for verification.

本人現附上香港身份證 / 護照* 的副本以供核實本人的香港身份證 / 護照* 號碼, 本人因此毋須為受託人的核對工作親身出示香港身份證 / 護照*。

Remark 備註

If you do not select any options but there are accrued benefits derived from voluntary contributions (except contributions made under "Easy Gold Plan"), those benefits will be handled in the same way as those stated in Part III(1). If there are no such benefits in your account and you have made an election in Part III(2), the selected option will not be processed.

如果你沒有作出任何選擇, 而帳戶內有由自願性供款(「積·金·易」供款除外)產生的累算權益, 則該等權益將以處理第 III(1) 部的權益的同樣方式處理。如果你已在第 III(2) 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。

Part IV. Termination of MPF Account with No Residual Balance (if applicable) 終止沒有剩餘款項的強積金帳戶 (如適用)

I hereby give the original trustee an instruction to terminate my relevant MPF member account as referred to in Part IIA 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IIA部份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。

Part V. Authorisation 授權 (Please 請「✓」) (Only applicable to fund transfer to BCT (MPF) Pro Choice or BCT (MPF) Industry Choice 只適用於資金轉移至BCT積金之選或BCT(強積金)行業計劃)

I authorise Bank Consortium Trust Company Limited ("BCT") to obtain the necessary information in respect of my MPF account(s) from the Original trustee, and the Original trustee to release such information to BCT. Should there be any incomplete or incorrect information in Part IIA above, I also authorise BCT to make any necessary amendment(s) to that part pursuant to the information provided by the Original trustee in respect of my MPF account(s).

I further authorise BCT to provide a copy of my identification document to the Original trustee if it is so required and solely for the purpose of processing this transfer (You may choose to attach a copy of your identification document in order for BCT to pass it to the Original trustee if it is so required).

本人授權銀聯信託有限公司(「銀聯信託」)向原受託人索取有關本人之強積金帳戶的所須資料，並授權原受託人向銀聯信託發放有關資料。若於本表格第II部A項的資料有任何遺漏或錯誤，本人授權銀聯信託根據原受託人所提供的強積金帳戶資料作出必須的修正。

本人亦授權銀聯信託於有需要的情況下向原受託人提供本人身份證明文件的副本，以達至處理是次轉移的目的。(您亦可選擇提交身份證明文件副本，讓銀聯信託於有需要的情況下將之轉交予原受託人。)

Part VI. Personal Information Collection Statement 收集個人資料聲明

The personal data provided by or in respect of Members and Participating Employers of the BCT (MPF) Pro Choice and / or the BCT (MPF) Industry Choice (collectively referred as the "Schemes") (concerning application records and operational records and / or their dealing / transaction details records) will only be accessed and handled by properly authorised staff of BCT (the trustee of the Schemes), BCT Financial Limited ("BCTF", the sponsor of the Schemes) and their properly authorised service providers and agents, and may be used, disclosed and / or transferred (whether in or outside Hong Kong) to such persons as BCT or any of its service providers may consider necessary, including governmental authorities and regulators, for any of the following purposes: (i) exercising or performing the functions conferred or imposed by or under or for the purposes of the Mandatory Provident Fund Schemes Ordinance ("Ordinance"); (ii) providing Mandatory Provident Fund services including the processing, administering, managing, and analysing of their, as the case may be, contributions, accrued benefits and portfolios and direct marketing of Mandatory Provident Fund services; (iii) improving the provision of Mandatory Provident Fund services by BCT to customers generally (including the facilitation of the provision of Mandatory Provident Fund services to enable the customers of BCT generally to access Mandatory Provident Fund (or other) account details through the internet and / or automated teller machine networks such as JETCO); (iv) compliance with applicable laws and regulations, and court order and / or (v) any other purposes for the exercise or performance of the above mentioned functions. If there is any change in the information provided, BCT should be notified as soon as practicable. Failure to provide the information requested may result in BCT being unable to process the instructions.

Members and Participating Employers have a right to request access to and correction of any personal data or to request that personal data about them not be used for direct marketing purposes. Requests can be made in writing to the Data Protection Officer at BCT, 18/F Cosco Tower, 183 Queen's Road Central, Hong Kong.

由BCT積金之選及 / 或BCT(強積金)行業計劃(統稱為「強積金計劃」)成員及參與僱主所提供或相關之個人資料(有關申請及運作記錄)及 / 或他們的買賣 / 交易細節記錄僅供銀聯信託(強積金計劃之受託人)、銀聯金融有限公司(「銀聯金融」，強積金計劃之保薦人)及它們正式授權之服務供應商及代理之正式授權之職員使用及處理，及在銀聯信託或其任何服務供應商認為有需要時，或會被使用、披露及 / 或轉移(在香港境內或境外)予個別人士，包括政府機關及監管機構作以下列任何之目的：(一)行使或執行強制性公積金計劃條例(「條例」)下所授予或施加之職能或根據該條例的目的而行使或執行職能；(二)提供強制性公積金的服務包括處理、掌管、管理及分析供款、累算權益及投資組合，視乎情況而定，及直銷強制性公積金服務；(三)改善銀聯信託提供予客戶一般之強制性公積金服務(包括協助提供強制性公積金服務以令銀聯信託之客戶可於互聯網及 / 或自動櫃員機網絡例如銀通處理強制性公積金(或其他)戶口資料)；(四)遵守適用之法律及規例及法院命令及 / 或(五)任何以行使或執行上述職能作目的之用途。如所提供資料有所變更，請在可行的情況下儘快通知銀聯信託。未能提供所需資料可能導致銀聯信託不能處理有關指示。

成員及參與僱主有權要求查閱或更改任何個人資料或要求個人資料不被用作直銷之用。請以書面聯絡銀聯信託之資料保護主任，香港皇后大道中183號中遠大廈18樓。

Part VII. Authorisation and Declaration 授權及聲明

- (1) I have read the Explanatory Notes.
- (2) 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.
- (3) I understand and agree that the personal data to be supplied in this form is to be used for the purpose(s) of processing my election(s) of transfer as requested in this form.
- (4) I understand and agree that the personal data I 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.
- (5) I undertake that if there is any change in the information so provided, I shall notify BCT as soon as reasonably practicable.
- (6) I declare that to the best of my knowledge and belief, the information given in this form and its attachments is correct and complete.
- (7) I hereby agree to indemnify BCT against any actions, proceedings, claims, losses, damages, costs or expenses which may be brought against BCT or suffered or incurred by BCT arising either directly out of or in connection with BCT accepting facsimile instructions or e-mail instructions and acting thereon, whether or not the same are confirmed by me in writing. Notwithstanding the above, BCT has the right to determine which forms or other documents of instructions may or may not be accepted by facsimile or email.
- (1) 本人已閱讀《填報須知》的內容。
- (2) 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。
- (3) 本人明白及同意在本表格提供的個人資料，將被用作處理本人在本表格內要求的轉移選擇。
- (4) 本人明白及同意本人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。
- (5) 本人承諾若所提供之資料有任何更改，將儘快通知銀聯信託。
- (6) 本人聲明，盡本人所知及所信，本表格及隨附之文件（如有）所提供的資料均屬正確無訛且無缺漏。
- (7) 本人同意銀聯信託不論在有否得到本人的書面確認下均可接受及處理傳真指示或電郵指示及根據該等指示處理有關事宜，本人亦同意賠償銀聯信託因接受或處理該等傳真指示或電郵指示而直接或間接導致銀聯信託遭受或承受的任何行動、訴訟、理賠、損失、損害、成本或費用。銀聯信託毋須因處理該等指示而直接或間接導致的任何行動、訴訟、理賠、損失、損害、成本或費用而承擔責任。然而，銀聯信託有權決定何種表格或其他指示文件能否以傳真方式或電郵方式傳遞。

Signature of Applicant (in the same specimen of previous service provider) ^{Note 9}

申請人簽署（簽署式樣須與前服務提供者相同）^{註9}

Date (D / M / Y) 日期 (日 / 月 / 年)

Internal Use Only 內部專用

Date Received: Processed By: () Approved By: () Remarks:

Broker Code: Agent Code: Campaign Code: BD Code:

Request for Fund Transfer Form (for self-employed person, personal account holder or employee ceasing employment) [FORM: RFT (MEM)]

Explanatory Notes

1. 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 and “Easy Gold Plan” which the scheme member may elect to withdraw in accordance with the governing rules of the original scheme.
2. Definition of terms:
 - I. “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.
 - II. “Personal account” – an account in an MPF scheme which is mainly used to receive the accrued benefits transferred from another account(s).
 - III. “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.
 - IV. “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: RFT(MEM) will be the same as the original trustee.
 - V. “Original scheme” – the MPF scheme from which your accrued benefits are to be transferred.
 - VI. “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: RFT(MEM) will be the same as the original scheme.
3. If you do NOT possess a HKID Card, please fill in your name as shown on your passport.
4. Please note that the transfer request may not be processed if the name of original trustee, the name of the original scheme, your scheme member’s account no. in the original scheme, type of MPF account, the name of your former employer or the employer’s identification no. 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.

5. The employer’s identification no. is the no. assigned by the trustee to the employer concerned. Trustees may use different names for this no. (e.g. account no., company code, contract no., employer account no., employer code, employer ID, employer no., MPF client no., participating plan no., plan no., scheme no., scheme ID, sub-scheme no.). The no. 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.
6. Please ensure that you have a personal account or a contribution account in the new scheme. Otherwise, you have to enroll in that scheme before you submit FORM: RFT(MEM) to the new trustee.
7. 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 no. in your 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 no. blank if you have recently enrolled in the scheme and have not been notified of the new account no.. If you are in doubt, please contact your new trustee.

8. 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.
9. 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.
10. If you wish to transfer-out the accrued benefits from more than one accounts, you should submit a separate Form: RFT(MEM) for each of those accounts.
11. If you wish to transfer-out the accrued benefits from your contribution account during employment, you should complete FORM: MPF(S)-P(P).
12. Please complete FORM: RFT(MEM) carefully as the administration procedures taken by the trustees may not be reversible.
13. 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.
14. If any information provided on FORM: RFT(MEM) (including the signature) is incorrect or incomplete, the trustees may not be able to process your benefit transfer request.
15. 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.
16. 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.

資金轉移表格(適用於自僱人士、個人帳戶持有人或終止受僱的僱員) [表格：RFT (MEM)]

填報須知

- 就每一個帳戶，除了由自願性供款及「積·金·易」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。
- 用詞定義：
 - 「供款帳戶」– 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帳戶。
 - 「個人帳戶」– 指強積金計劃下主要用以接收由另一帳戶轉入的累算權益的帳戶。
 - 「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」)– 指轉出您的累算權益的強積金計劃的受託人。
 - 「新受託人」(在《規例》中亦稱「承轉受託人」)– 指轉入您的累算權益的強積金計劃的受託人。如您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，在表格：RFT (MEM)所述的新受託人將與原受託人相同。
 - 「原計劃」– 指轉出您的累算權益的強積金計劃。
 - 「新計劃」– 指轉入您的累算權益的強積金計劃。如您選擇將累算權益轉移至同一強積金計劃的另一個帳戶，在表格：RFT (MEM)表格所述的新計劃將與原計劃相同。
- 如您沒有香港身份證，請填上您在護照上的姓名。
- 請注意，如您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。您可透過以下途徑獲取有關資料：
 - 成員證明書；
 - 周年權益報表；或
 - 受託人提供的成員查詢服務。
- 如有疑問，請聯絡您的原受託人或僱主。**
- 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。
- 請確保您在新計劃已開立個人帳戶或供款帳戶。否則，您在向新受託人提交表格：RFT (MEM)之前，便須登記參加該新計劃。
- 請注意，如您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。您可透過以下途徑獲取有關資料：
 - 成員證明書；
 - 周年權益報表；或
 - 受託人提供的成員查詢服務。
- 不過，如您最近才參加計劃，並未獲悉新的成員帳戶號碼，則可留空此項。如有疑問，請聯絡您的新受託人。
- 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，請聯絡您的原受託人。
- 您的簽署必須與您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您的簽名式樣不符，有關轉移或不獲處理。如有疑問，請聯絡您的原受託人。
- 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表格：RFT (MEM)。
- 如欲在現職期間從您的供款帳戶轉出累算權益，請填寫表格：MPF(S)-P(P)。
- 請小心填寫表格：RFT (MEM)，因為受託人未必能夠撤銷已採取的行政步驟。
- 如您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您不符合部分或所有保證條件，從而影響您享有保證的資格。有關詳情請查閱原計劃的要約文件或向原受託人查詢。
- 若您在表格：RFT (MEM)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您的權益轉移要求。
- 新計劃的資料載於該計劃的要約文件，此等資料將有助您決定是否把累算權益轉移至該計劃。您可向新受託人索閱該要約文件。
- 如欲就轉移選擇作出查詢或尋求協助，請聯絡您的原受託人或新受託人。您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。

[Applicable to individual members]

Bank Consortium Trust Company Limited
18/F, Cosco Tower,
183 Queen's Road Central,
Hong Kong

[Date]

Dear Sir/Madam

Appointment of Exclusive MPF Intermediary / Servicing Agent

I, _____ *[Name of client]* (holder of Hong Kong Identity Card number _____), have on *[Date]*, appointed **Sun Flower Insurance Brokers Limited** *[Name of the Corporate Intermediary]* as my exclusive MPF Intermediary/ servicing agent with respect to my MPF scheme arrangement.

I hereby direct and authorise Bank Consortium Trust Company Limited (“BCT”) to disclose and transfer my personal data and details of transactions/dealings of my account(s) as indicated below to **Sun Flower Insurance Brokers Limited** *[Name of the Corporate Intermediary]* and their individual MPF Intermediaries for the purpose of their reviewing the dealing/transaction details of my said account(s) and giving advice thereon in connection with the scheme(s) of which I am a member.

Please initial in the appropriate boxes below to indicate the specific scheme(s) and account(s) that you authorise BCT to disclose the details of which to the Corporate Intermediary as mentioned above.

| Scheme | Account | | |
|--|---|---|---|
| <input type="checkbox"/> Bank Consortium MPF Plan | <input type="checkbox"/> Regular Employee | <input type="checkbox"/> Preserved Member | <input type="checkbox"/> Self-employed Person |
| <input type="checkbox"/> Bank Consortium Industry Plan | <input type="checkbox"/> Regular Employee | <input type="checkbox"/> Preserved Member | <input type="checkbox"/> Self-employed Person |

Yours faithfully,

<Signature of the client>

For Internal Use Only

Broker Code:

Agent Code:

[適用於僱員成員]

銀聯信託有限公司
香港皇后大道中 183 號
中遠大廈 18 樓

[日期]

敬啟者：

唯一強積金中介人 / 服務代理人委任書

本人，_____ [委任人姓名] (香港身份證號碼 _____) 於[日期]起委任 **新華保險顧問有限公司** [機構中介人名稱] 為處理本人強積金計劃事宜之唯一強積金中介人 / 服務代理人。

本人在此指示並授權予銀聯信託有限公司向 **新華保險顧問有限公司** [機構中介人名稱] 及其個別強積金中介人披露及轉移本人的個人資料及有關本人帳戶內之買賣 / 交易詳情，以用作檢視本人的帳戶內之買賣 / 交易情況及就此給予意見。

請於下列空格 勾選閣下授權銀聯信託有限公司披露予上述機構中介人的強積金計劃及戶口：

| 計劃: | 帳戶: | | |
|------------------------------------|-------------------------------|-------------------------------|-------------------------------|
| <input type="checkbox"/> 銀聯信託強積金計劃 | <input type="checkbox"/> 一般僱員 | <input type="checkbox"/> 保留帳戶 | <input type="checkbox"/> 自僱人仕 |
| <input type="checkbox"/> 銀聯信託行業計劃 | <input type="checkbox"/> 一般僱員 | <input type="checkbox"/> 保留帳戶 | <input type="checkbox"/> 自僱人仕 |

此致

<委任人簽署>

For Internal Use Only

Broker Code:

Agent Code: