

Scheme Number 計劃編號		Name of Employer 僱主名稱	
Employment Related Information 與任職有關的資料: <input type="checkbox"/> Newly Enrolled Member 新登記之成員 <input type="checkbox"/> Employer Scheme Transfer 僱主計劃轉移 (Effective Date of Transfer 轉移生效日期: ____ (M)月/ ____ (D)日/ ____ (Y)年) <input type="checkbox"/> Expatriate Employee 海外僱員 (Date of Arrival at Hong Kong 抵達香港日期: ____ (M)月/ ____ (D)日/ ____ (Y)年)			
A. Employee Details 僱員資料			
Name of Employee [^] 僱員姓名 [^] (English 英文)		(Chinese 中文)	Nationality 國籍
HKID Card No. / Passport No. [^] 香港身份證/護照號碼 [^] (Please provide photocopy and stamp "COPY" on to the image of the photo in the copy 請附上影印本並於副本上的人像上面印上「COPY」)		Sex 性別 <input type="checkbox"/> Male 男 <input type="checkbox"/> Female 女	Date of Birth [^] 出生日期 [^] _____ / _____ / _____ M 月 D 日 Y 年
Date of Employment 入職日期 _____ M 月 / _____ D 日 / _____ Y 年	Email Address 電郵信箱		
Residential Address [^] 住址 [^]			
Telephone No. 電話: (Residence 住宅)		(Office 公司)	(Mobile 手提電話)
B. Investment Instruction 投資指示			
<ul style="list-style-type: none"> The future contributions or accrued benefits transferred from another scheme can only be invested into: 未來供款或轉移自另一個計劃的累算權益只可投資於: <ul style="list-style-type: none"> a) Default Investment Strategy ("DIS")** 預設投資策略** ; or 或 b) One or more constituent funds under the Scheme of member's own choice (including the Core Accumulation Fund and Age 65 Plus Fund) and according to member's assigned allocation percentage(s) to relevant fund(s) of member's choice. 從下列成分基金名單, 成員自行選擇本計劃內一項或多項成分基金(包括核心累積基金與 65 歲後基金)並根據成員選定的相關基金指定配置百分比投資。 If this section is left blank or no valid specific investment instruction*** is received, then your contributions or accrued benefits transferred from another scheme will be invested according to DIS as per the MPF Scheme Brochure of the MASS Mandatory Provident Fund Scheme ("Scheme"). 如果此部份留空或沒有收到有效的特定投資指示***, 根據萬全強制性公積金計劃(「本計劃」)的強積金計劃說明書, 您的供款或轉移自另一個計劃的累算權益將會按照預設投資策略來作出投資。 			
Constituent Fund Name / Investment Instruction 成分基金名稱/投資指示		Allocation of Contribution (Including mandatory and voluntary contribution, if any) 供款分配率 (包括強制性及自願性供款, 如適用)	
Please ✓, if you choose DIS as investment instruction 如閣下選擇預設投資策略作為投資指示, 請加上 ✓ 號			
<input type="checkbox"/> Default Investment Strategy 預設投資策略		100%	
Or 或			
Global Stable Fund 環球均衡基金			%
Global Growth Fund 環球增值基金			%
Guaranteed Fund 保證基金			%
MPF Conservative Fund 強積金保守基金			%
Global Equity Fund 環球證券基金			%
Global Bond Fund 環球債券基金			%
Asian Bond Fund 亞洲債券基金			%
Asian Pacific Equity Fund 亞太股票基金			%
US Equity Fund 美國股票基金			%
European Equity Fund 歐洲股票基金			%
Hong Kong Equities Fund 香港股票基金			%
Greater China Equity Fund 大中華股票基金			%
Core Accumulation Fund**** 核心累積基金****			%
Age 65 Plus Fund**** 65歲後基金****			%
Total 總數			100%

C. Regular Voluntary Contribution 規律性自願性供款 <input type="checkbox"/> Applicable 適用 <input type="checkbox"/> Not applicable 不適用	
If applicable, please provide the following details 如適用, 請提供下列資料	
Definition 定義	Employee Contribution 僱員供款
<input type="checkbox"/> Exceeds maximum level of relevant income 超過最高有關入息水平	in excess of the maximum level of contribution of 5% of relevant income 超過有關入息百分之五的供款上限的金額
<input type="checkbox"/> Relevant income 有關入息	_____ % of relevant income 有關入息的百分比
<input type="checkbox"/> Regular amount per month 每月定額	HK\$ 港幣 _____

* If your HKID card states only your year of birth and you have no other proof of identity stating the exact date of birth (e.g., birth certificate, passport), please enter December 31 as the month and the day. If your HKID card contains the year and month but not the day, you should enter the last day of the month as the day of birth. 如您的香港身份證上只有出生年份, 而您沒有其他證件證明您實際出生日期 (例如出生證明書或護照), 請以12月31日作為出生日期。如您的香港身份證上只有出生年份和月份而沒有出生日子, 請以有關月份的最後一天作為出生日期。

** The Default Investment Strategy ("DIS") aims to balance the long term effects of risk and return through investing in two constituent funds ("CFs"), namely the Core Accumulation Fund ("CAF") and the Age 65 Plus Fund ("A65F"), according to the pre-set allocation percentages at different ages. The DIS will manage investment risk exposure by automatically reducing the exposure to higher risk assets and correspondingly increasing the exposure to lower risk assets as the member gets older. 預設投資策略透過於不同年齡按照預定配置百分比投資於兩項成分基金 (即核心累積基金與65歲後基金), 旨在平衡長期風險與回報。預設投資策略將會隨著成員年齡增長而自動減少投資於較高風險資產, 並相應增加投資於較低風險資產, 藉此管理投資風險。

*** Specific Investment Instruction is considered to be valid if the following conditions are met 若符合以下條件, 特定投資指示將被視為有效:

- (i) total allocation percentages of the selected constituent funds for each account and each sub-account (if applicable) are equal to 100%
於每個帳戶及每個子帳戶 (如適用) 所選擇的成分基金的總分配百分比等如 100%
- (ii) the Member's signature of the submitted form is matched with Trustee's records (if applicable)
計劃成員的簽署式樣與受託人的紀錄相符 (如適用)

**** De-risking features of the DIS do not apply to those standalone investment fund choices. 降低風險過程不適用於這些獨立投資基金選擇。

^ The information are required to be reported by the reporting financial institution to the Inland Revenue Department. 這些項目為申報金融/財務機構須向稅務局申報的資料。

Note 備註:

1. Please initial next to any corrections you make on this form. 如有任何刪改, 請於刪改處旁簽署。
2. Please provide the original copy of this Form. Please note that a faxed copy will not be accepted. 請提供此表格的正本。敬請注意: 本部不接受此表格的傳真本。

D. Tax Residency Self-Certification (Must Fill) 稅務居民身分自我證明 (必須填寫)
Please read the following instructions before completing this part 請在填寫本部分前細閱以下指示:
Why are we asking you to complete this part? 為何我們要求你填寫本部分?
To help protect the integrity of tax systems, governments around the world are introducing a new information-gathering and reporting requirement for financial institutions. This is known as the Common Reporting Standard (the "CRS"). 為維護稅制完整, 全球各地政府現正推出適用於金融/財務機構的資料收集及匯報新規則, 名為共同匯報標準 (簡稱「CRS」)。
Under the CRS, we are required to determine where you are a "tax resident" (this will usually be where you are liable to pay income taxes). If you are a tax resident outside Hong Kong, we may need to give the Inland Revenue Department this information, along with information relating to your accounts. That may then be exchanged with different countries'/jurisdictions' tax authorities. 根據CRS 規定, 我們必須確定你的「稅務居住地」(這通常是你有義務繳納薪俸稅的國家/地區)。若你的稅務居住地不是香港, 我們可能需要將此情況及你的有關帳戶資料告知稅務局, 稅務局隨後或會將相關資料與不同國家/地區的稅務機關交換。
Completing this part will ensure that we hold accurate and up to date information about your tax residency. 填寫本部分可確保我們持有你正確及最新的稅務居住地資料。
<u>If your circumstances change and any of the information provided in this part becomes incorrect, please let us know within 30 days and provide an updated 'Individual Tax Residency Self-Certification Form (CRS-I (HK)-MPF)'. 如你的情況有變, 導致本部分內的任何資料不再正確, 請於三十天內告知我們, 並提交一份已更新的「個人稅務居民自我證明表格(CRS-I (HK)-MPF)」。</u>
Where to go for further information? 如何獲取更多資訊?
If you have any questions about this part, please call our MPF hotline at 2533-5522. 如對本部分有任何疑問, 請致電我們的強積金熱線2533-5522。
The Organisation for Economic Co-operation and Development ("OECD") has developed the rules to be used by all governments participating in the CRS and these can be found on the OECD's Automatic Exchange of Information ("AEOI") website, www.oecd.org/tax/automatic-exchange/ . 經濟合作與發展組織 (簡稱「經合組織」) 已制訂規則, 供參與CRS的所有政府使用, 並載於經合組織的自動交換資料 (簡稱「AEOI」) 網站 www.oecd.org/tax/automatic-exchange/ 。
Please also visit the website of the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region that sets out information relating to the implementation of AEOI in Hong Kong: http://www.ird.gov.hk/eng/tax/dta_aeoi.htm . Meaning of terms and expressions used in this form (e.g. "account holder" and "reportable account") may be found under Section 50A of the Inland Revenue Ordinance (Cap. 112). 另請參閱香港特別行政區政府稅務局 (簡稱「稅務局」) 的網站了解香港實施AEOI的詳情: www.ird.gov.hk/chi/tax/dta_aeoi.htm 。有關本表格內所用詞彙的涵義 (例如: 「帳戶持有人」和「須申報帳戶」), 請參閱《稅務條例》(第112章) 第50A條。
If you have any questions on how to define your tax residency status, please visit the OECD website, or speak to your tax advisor as we are not allowed to give tax advice. 如你對判定你的稅務居民身分有任何疑問, 請瀏覽經合組織網站或諮詢你的稅務顧問。請恕我們不能提供稅務意見。

D. Tax Residency Self-Certification (Must Fill) (CONT'D) 稅務居民身分自我證明 (必須填寫) (續)**Important Notes 重要提示：**

- This is a self-certification provided by an account holder to a reporting financial institution for the purpose of automatic exchange of financial account information. The data collected may be transmitted by the reporting financial institution to the Inland Revenue Department for transfer to the tax authority of another country/jurisdiction. 這是由帳戶持有人向申報金融/財務機構提供的自我證明，以作自動交換財務帳戶資料用途。申報金融/財務機構可把收集所得的資料交給稅務局，稅務局會將資料轉交到另一國家/稅務管轄區的稅務當局。
- An account holder should report all changes in his/her tax residency status to the reporting financial institution. 如帳戶持有人的稅務居民身分有所改變，應盡快將所有變更通知申報金融/財務機構。
- If space provided is insufficient, continue on additional sheet(s). Information in Section A & D marked with (^) are required to be reported by the reporting financial institution to the Inland Revenue Department. 如這份表格上的空位不夠應用，可另紙填寫。在A及D部份標有記號(^)的項目為申報金融/財務機構須向稅務局申報的資料。

(1) **My Tax Residence is Hong Kong ONLY, with no tax residence in any other jurisdictions or countries (and my HKID number is my TIN).** 本人之稅務居住地只有香港，及沒有處於任何其他司法管轄區或國家的稅務居住地（而我的香港身份證號碼是我的稅務編號）。

Please tick one. 請選一項。

Yes 是 (you may skip (2). 你可略過 (2).)

No 否 (please complete (2). 請填寫 (2).)

(2) Complete the following table indicating 提供以下資料，列明：

(a) each country/jurisdiction (including Hong Kong) where the account holder is a resident for tax purposes; and 帳戶持有人作為稅務居民的國家/司法管轄區(包括香港)；及

(b) the account holder's TIN for each country/jurisdiction indicated. 該國家/稅務管轄區發給帳戶持有人的稅務編號。

If the account holder is a tax resident of Hong Kong, the TIN is the Hong Kong Identity Card Number (HKID). 如帳戶持有人是香港稅務居民，稅務編號是帳戶持有人的香港身份證號碼。

If a TIN is unavailable, provide the appropriate reason A, B or C 如沒有提供稅務編號，必須填寫合適的理由：

#	Reason 理由 A	The country/jurisdiction where the account holder is a resident for tax purposes does not issue TINs to its residents. 帳戶持有人的國家/稅務管轄區並沒有向其居民發出稅務編號。
	Reason 理由 B	The account holder is unable to obtain a TIN. Explain why the account holder is unable to obtain a TIN if you have selected this reason. 帳戶持有人不能取得稅務編號。如選取這一理由，解釋帳戶持有人不能取得稅務編號的原因。
	Reason 理由 C	TIN is not required. Select this reason only if the authorities of the country/jurisdiction of tax residence do not require the TIN to be disclosed. 帳戶持有人毋須提供稅務編號。國家/稅務管轄區的主管機關不需要帳戶持有人披露稅務編號。

Country/Jurisdiction of Tax Residence [^] 國家/稅務管轄區 [^]	TIN [^] 稅務編號 [^]	Enter Reason A, B or C# if no TIN is available 如沒有提供稅務編號， 填寫理由A、B或C#	Explain why the account holder is unable to obtain a TIN if you have selected Reason B 如選取理由B，解釋帳戶持有人 不能取得稅務編號的原因
1			
2			
3			
4			
5			

If you have any foreign indicia (e.g. nationality, place of birth, residential address/correspondence/office address, contact number, etc...), please provide your explanation for not being a tax resident of the country/jurisdiction. 如果您有任何外籍標記（例如：國籍、出生地點、住宅/通訊/辦公地址、聯繫電話等），請在以下方框內解釋不屬於此國家/司法管轄區的稅務居民之原因。

Declaration 聲明

Personal Information Collection Statement 收集個人資料聲明

The information provided by Participating Employers or Members of the Scheme on this application form or other forms prescribed by YF Life Trustees Limited ("Trustee") and details of any transactions or dealings by such Participating Employers or Members may be held by the Trustee for the purposes of processing their participation in the Scheme and providing administrative, computer or any other services as may be considered necessary in connection with the MPF operation, and may also be used for observing any legal, governmental or regulatory requirements of any relevant jurisdiction (including any disclosure or notification requirements to which any recipient of the data is subject) and for providing information for the dispatch of information on MPF products or services from the Trustee. Please note that failure to provide any information requested by the Trustee may result in the Trustee not being able to process your process your participation in the Scheme. Your personal information collected by or held by the Trustee may be transferred or disclosed by the Trustee to any of the following persons (whether within or outside Hong Kong) for the purposes as specified above or to governmental / regulatory bodies (whether within or outside Hong Kong) for them to carry out their governmental / regulatory functions: (1) The Trustee group companies and their associated / affiliated companies; (2) governmental / regulatory bodies and law enforcement agencies; and (3) crime prevention organisations and their members/participants; and (4) service providers and selected persons which are under a duty of confidentiality to the Trustee. Participating Employers and Members have a right to require access to and correction of their company or personal data or to request that their company or personal data not be used for direct marketing purposes by giving written notice to the Trustee at the address at 27/F, 33 Lockhart Road, Wanchai, Hong Kong. The Trustee may charge a reasonable fee for the processing of such request. 參與僱主或計劃成員在本申請表或在萬通信託有限公司(下稱「受託人」)所指定表格提供的資料及該等人士的交易詳情可由受託人保留，以作為批核參加本計劃申請之用途，並可用作提供行政、電腦或其他因強積金運作而需要的服務，並可用作遵行任何有關適用司法管轄區的法律、政府或監管規定(包括任何人所收取到的資料披露及通知規定)；及提供受託人用作發放其強積金產品或服務資料。請注意，閣下必須提供受託人所需的個人資料，否則，受託人將不能處理閣下之參加本計劃申請。受託人可能為達到上述目的或讓政府/監管機構(不論在香港或海外)執行其職務而向以下任何一方(不論在香港或海外)轉移或透露由受託人收集或持有屬於閣下的個人資料：(1)受託人集團成員公司及其關聯或相關公司；(2)政府部門或監管機構和執法機構；及(3)防犯罪組織及其會員/參與者；及(4)與受託人有保密協議的服務提供者及其他人士。參與僱主和計劃成員有權查閱及更正其公司或個人資料，閣下可致函受託人要求其公司或個人資料不得使用於直接促銷用途，並呈交至香港灣仔駱克道33號27樓。處理上述要求時，受託人可能會收取合理費用。

Authorization 授權

I hereby authorize the Participating Employer to deduct any regular contribution from my monthly salary and agree to the rules of the Scheme and any amendments made thereto. 本人授權參與僱主由本人每月薪金扣除任何定期供款及同意計劃列明的條款及將來可能作出的修訂。 I confirm that I have read and understood the MPF Scheme Brochure. 本人確認已閱讀並明白強積金計劃說明書的內容。

WARNING: It is a serious offence under the Inland Revenue Ordinance if any person, in making a self-certification, makes a statement that is misleading, false or incorrect in a material particular AND knows, or is reckless as to whether, the statement is misleading, false or incorrect in a material particular. Heavy penalty may apply upon conviction.

警告：根據《稅務條例》，如任何人在作出自我證明時，在明知一項陳述在要項上屬具誤導性、虛假或不正確，或罔顧一項陳述是否在要項上屬具誤導性、虛假或不正確下，作出該項陳述，即屬嚴重罪行。一經定罪，可致重罰。

WARNING: Under section 43E of the Mandatory Provident Fund Schemes Ordinance, a person who, in any document given to the Mandatory Provident Fund Schemes Authority or an approved trustee, knowingly or recklessly makes a statement which is false or misleading in a material respect commits an offence and is liable to a maximum penalty of a \$100,000 fine and one year's imprisonment on the first conviction and a \$200,000 fine and two years' imprisonment on each subsequent conviction. A person who knowingly and wilfully makes a statutory declaration false in a material particular also commits an offence under section 36 of the Crimes Ordinance (Cap 200) and is liable on conviction to imprisonment for two years and to a fine.

警告：根據《強制性公積金計劃條例》第43E條，任何人在給予強制性公積金計劃管理局或核准受託人的任何文件中，明知或罔顧後果地作出在要項上屬虛假或具誤導性的陳述，即屬犯罪。首次定罪者，最高可處罰款\$100,000及監禁一年；其後每次定罪，最高可處罰款\$200,000及監禁兩年。根據《刑事罪行條例》(第200章)第36條，任何人明知而故意在法定聲明中作出在要項上屬虛假的陳述，亦屬犯罪。一經定罪，可處監禁兩年及罰款。

Signature of Employer
With Company Chop
僱主簽署連同公司印章

:

Signature of Employee 僱員簽署
(This signature will be used to verify your future
correspondences with us. 此簽署式樣將用於核
對您日後提交給本公司的文件)

:

Date (MM/DD/YYYY)
日期 (月/日/年)

:

REMINDER 提示：

If you have accrued benefits in another trustee company and would like to transfer them to the Scheme for account consolidation, please complete the attached Scheme Member's Request for Fund Transfer Form (MPF(S)-P(M)). 如閣下於其他受託人存有累算權益而欲將其綜合轉移至本計劃，請填妥隨附之計劃成員資金轉移申請表(MPF(S)-P(M))。

NOTES TO TRANSFER OF BENEFITS BY SCHEME MEMBER
(for self-employed person, personal account holder or employee ceasing employment)
計劃成員轉移權益須知
(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 notes** before completing this Form:

填寫本表格前，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 approved 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核准受託人。
- (d) "New trustee" (also known as "transferee trustee" in the Regulation) - the approved 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核准受託人。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) If you wish to transfer your accrued benefits from one MPF scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy ("DIS") if you either (a) do not give or have not given any investment instructions for the account to your new trustee or (b) have given investment instructions for the account to invest accrued benefits according to the DIS. Please approach your new trustee to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in the new scheme, please also approach the new trustee.
如欲把累算權益從一個強積金計劃轉移至另一個強積金計劃，請留意轉入帳戶的權益將會如何投資。一般而言，如你(a)沒有或尚未就有關帳戶向你的新受託人給予任何投資指示；或(b)已就有關帳戶給予投資指示，要求把累算權益按照預設投資策略投資，則轉入該帳戶的權益將按照預設投資策略投資。如有需要，請向新受託人查詢詳情。如欲就新計劃的帳戶更改或給予投資指示，亦請聯絡新受託人。
- (4) If you have reached, or are approaching, the age of 50 and your accrued benefits are currently invested according to the DIS of the scheme, you should be aware that the de-risking mechanism of the DIS starts at the age of 50. If the annual de-risking of your investment in the DIS and your transfer request take place at around the same time, the approved trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant approved trustee(s) if you wish to know the details of how the approved trustee(s) will handle these transactions.
如你已年滿或快將年滿50歲，而現時你的累算權益是按照計劃的預設投資策略投資，請留意預設投資策略的降低投資風險機制，會由計劃成員年滿50歲開始運作。如計劃的核准受託人在預設投資策略下按年降低你的投資風險的時間，與接獲你的轉移權益申請的時間相當接近，該計劃的核准受託人將根據其運作程序及在符合《強制性公積金計劃條例》規定的情況下，訂定處理降低風險及轉移權益的次序。如欲瞭解核准受託人如何處理該等交易，請向相關核准受託人查詢詳情。
- (5) 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。
- (6) 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。
- (7) 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。
- (8) 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。
- (9) In order to prevent a third party from filling in incorrect information, please **DO NOT sign on a blank form**. After the completed Form MPF(S)-P(M) has been received by the new trustee, the administration procedures taken by the approved trustees may not be reversible.
為免被第三者填上不正確的資料，**請勿在空白的表格上簽署**。在新受託人收到已填妥的第MPF(S)-P(M)號表格後，之前由核准受託人採取的行政步驟未必能夠撤銷。

- (10) If any information provided on Form MPF(S)-P(M) (including the signature) is incorrect or incomplete, the approved 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。
- (11) Please refer to the publication of the Mandatory Provident Fund Schemes Authority ("MPFA") available from the MPFA website (www.mpfa.org.hk) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment.
有關選擇計劃時各項考慮因素及強積金投資的潛在風險，請參閱強制性公積金計劃管理局（「積金局」）網站（www.mpfa.org.hk）的相關宣傳刊物。
- (12) 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 of accrued benefits to that scheme. Please contact the relevant approved trustee for enquiries about account details and information on specific MPF schemes or funds.
新計劃的要約文件載有該計劃的資料，這些資料將有助你決定是否把累算權益轉移至該計劃。如欲查詢帳戶詳情及個別強積金計劃或基金的資料，請聯絡相關核准受託人。
- (13) If you wish to make enquiries or seek assistance in relation to your election to transfer benefit, please contact your original trustee or new trustee. For general enquiries regarding benefit transfer, you may contact the MPFA via e-mail: mpfa@mpfa.org.hk or hotline: 2918 0102.
如欲就你的權益轉移申請作出查詢或尋求協助，請聯絡你的原受託人或新受託人。有關權益轉移的一般查詢，可聯絡積金局（電郵地址：mpfa@mpfa.org.hk或熱線電話：2918 0102）。

Explanatory Notes

註釋

- (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, notice of acceptance, or notice of participation; or 查閱成員證書、接納通知或參與通知；或
(b) in your annual benefit statement, or other statements provided by the approved trustee; or 查閱周年權益報表或核准受託人提供的其他報表；或
(c) through the member enquiry facilities available from the approved trustee. 核准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 approved trustee to the employer concerned. Approved 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 approved trustees or through the member enquiry facilities available from the approved trustee. If you are in doubt, please contact your approved trustee or your employer.
僱主識別號碼即核准受託人為有關僱主編配的號碼。核准受託人或會使用不同名稱來設定此號碼（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）。你可查閱核准受託人發出的報表或透過核准受託人提供的成員查詢服務獲取該號碼。
如有疑問，請聯絡你的核准受託人或僱主。
- (4) 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:
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，或所提供的資料有誤，則此項轉移申請或不獲處理。你可透過以下途徑獲取有關資料：
(a) in your membership certificate, notice of acceptance, or notice of participation; or 查閱成員證書、接納通知或參與通知；或
(b) in your annual benefit statement, or other statements provided by the approved trustee; or 查閱周年權益報表或核准受託人提供的其他報表；或
(c) through the member enquiry facilities available from the approved trustee. 核准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 scheme member. The scheme member can also check this information through the member enquiry facilities available from the approved trustee. If you are in doubt, please contact your original trustee.
計劃成員可在原受託人向計劃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由自願性供款所產生的累算權益。計劃成員亦可透過核准受託人提供的成員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 given 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 previously given to your original trustee. If you are in doubt, please contact your original trustee.
你的簽署必須與你之前給予原受託人的簽署式樣相同。請注意，若本表格上的簽署與你之前給予原受託人的簽署式樣不符，有關轉移或不獲處理。如有疑問，請聯絡你的原受託人。

Please complete Form MPF(S)-P(M) at page 1 to page 2 and submit it to the new trustee after completion.

請填妥載於第 1 頁至第 2 頁的第 MPF(S)-P(M) 號表格，並提交該表格予新受託人。

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

計劃成員資金轉移申請表
(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

- Please use **BLOCK LETTERS** to complete this Form. 請用英文大楷填寫本表格。
- *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」。
- 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。
- The personal data to be supplied in support of this election of transfer are to be used for processing your election of transfer. The personal data you supply may, for such purpose, be transferred to the approved trustee(s) concerned, the relevant service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority ("MPFA"). 你就此項轉移申請提供的個人資料，將用作處理你的轉移申請。你提供的個人資料可能會為該目的而轉交相關核准受託人、相關服務提供者，以及政府或規管機構，包括強制性公積金計劃管理局(「積金局」)。
- If necessary, you may seek assistance from the MASS MPF hotline at 2533 5522. 如有需要，歡迎致電萬全強積金熱線 2533 5522 查詢。

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

- Name (as shown on your Hong Kong Identity (HKID) Card ^{Note 1}) : Mr./Mrs./Ms.* (英文)
姓名(與你的香港身份證上的姓名相同^{註1}) : _____
先生/太太/女士* (中文)
- 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)
- Contact Phone Number 聯絡電話號碼 : _____
- 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):

Flat/Room 室	Floor 樓層	Block 座	Name of Building 大廈
Street No. 街道號碼	Name of Street 街道		District 地區

Hong Kong 香港 / Kowloon 九龍 / N.T. 新界*

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

- 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} : _____
- 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} : _____
- 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 _____
MM 月 DD 日 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(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 _____
MM 月 DD 日 YYYY 年

SECTION III – TRANSFER OPTIONS 第三部 – 轉移選擇

(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):

<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帳戶
	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} : _____
<input type="checkbox"/>	(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} : _____
	Name of new scheme ^{Note 4} 新計劃名稱 ^{註4} : _____
	Scheme member's account number ^{Note 4} 計劃成員帳戶號碼 ^{註4} : _____
<input type="checkbox"/>	(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。)**

<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 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在第 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 第五部 – 授權及聲明

(11) I hereby give consent to the new trustee and the MPFA to disclose information supplied by me in support of this election of transfer to the approved trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer. 本人同意, 新受託人及積金局可為處理本人的轉移申請, 向相關核准受託人及相關服務提供者披露本人就此項轉移申請提供的資料, 或使該等機構/人士能夠取覽或披露該等資料。

(12) I declare that 本人聲明:

(a) I have read and understood the Notes to Transfer of Benefits by Scheme Member and the Explanatory Notes; and 本人已閱讀及明白《計劃成員轉移權益須知》及註釋的內容; 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

Note 注意:

1. This form is for subsidiary intermediaries' use only. Not applicable for enrollments, applications, switchings or redemptions conducted solely by customer himself or herself. 本表格只適用於附屬中介人，並不適用於經客戶自行處理的參與、轉移或贖回申請。
2. This declaration form is applicable to the conducting of regulated activities under the Guidelines on Conduct Requirements for Registered Intermediaries ("Guidelines") issued by Mandatory Provident Fund Schemes Authority ("MPFA"). 本聲明書適用於根據強制性公積金計劃管理局(下稱「積金局」)所發出的註冊中介人操守要求(下稱「指引」)下訂明之受規管活動。
3. Please complete in BLOCK LETTERS and tick ✓ the appropriate boxes. 請用正楷填寫，並於適當的方格內加上「✓」號。
4. The completed declaration form must be returned with Transfer Form, Application Form for Non-regular Voluntary Contribution, Redemption Form Voluntary Contribution or fund switching form to YF Life Trustees Limited ("Trustee"). 請把填妥的聲明書連同轉移申請表、非規律性自願供款申請表格、自願性供款贖回表格或基金轉換表格一併寄交萬通信託有限公司(下稱「受託人」)。

A. Personal information 個人資料

Name of customer (English) : _____

客戶姓名 (中文): _____

B. Disclosure to the customer 向客戶披露

1. YF Life Insurance International Ltd. ("YF Life") is the promoter of the Mass Mandatory Provident Fund Scheme ("Scheme") and its registered office is at 27th Floor, 33 Lockhart Road, Wanchai, Hong Kong. YF Life, the immediate holding company of the Trustee, is a registered principal intermediary with the MPFA (MPF Registration No.: IC000218) and is carrying on life insurance business. 萬通保險國際有限公司(下稱「萬通保險」)是萬全強制性公積金計劃(下稱「本計劃」)的推銷商，其註冊辦事處位於香港灣仔駱克道 33 號 27 樓。作為受託人的直屬控股公司，萬通保險是積金局的註冊主事中介人(強積金中介人註冊號碼: IC000218)，主要經營人壽保險業務。
2. The registered subsidiary intermediary ("Intermediary") as referred to in this declaration form below is appointed by YF Life to distribute the Scheme, and to invite and induce another person to make a material decision related to the matters set out in section 34F(5) of the Mandatory Provident Fund Schemes (Amendment) Ordinance 2012. 在本聲明書提及的註冊強制性公積金附屬中介人(下稱「中介人」)是由萬通保險委任，負責分發本計劃及邀請和誘使其他人士作出與 2012 年強制性公積金(修訂)條例第 34F(5)條中所述的事項有關的重要決定。
3. The Intermediary has provided his/ her business card to the customer (as referred to hereabove). 中介人已向上方提及的客戶提供他/她的名片。
4. In respect of the invitation and inducement mentioned in clause 2 hereinabove, the Intermediary will be compensated by way of commission and/or other monetary benefits which will not be different depending on the choices of the constituent funds made by the customer. 就上述第 2 條提及的邀請和誘使，中介人將會獲得佣金及/或其他金錢利益作為報酬，而該報酬不會因應客戶對成分基金的選擇而有差異。

Part C to E to be completed by the Intermediary C 部至 E 部由中介人填寫

C. Clients with special needs[^] 需特別關注客戶[^]

According to the Guidelines, customers who are illiterate, with low level (primary level or below) of education, visually or otherwise impaired in a manner that affects their ability to make the relevant key decision independently are regarded as clients with special needs. 根據指引，任何有語文困難、低學歷(小學程度或以下)、有視力或其他肢體受損的客戶，而該等情況影響其獨立地作出強積金相關的重要決定的能力，均被視作「需特別關注客戶」。

[^] According to The Guidelines, issued under section 6H of the Mandatory Provident Fund Schemes Ordinance, a registered intermediary should provide extra care of, and support for, clients with special needs during the sales and marketing process relating to the making of a key decision. A key decision for this purpose refers to one of the following decisions:

根據基於強制性公積金計劃條例第 6H 條而制訂的指引，強積金中介人在進行有關強積金的重要決定的銷售或推廣時，需額外謹慎照顧「需特別關注客戶」及提供支援。所謂「有關強積金的重要決定」，是指以下任何一項：

- (a) choosing a particular constituent fund; 選擇某一特定的成分基金;
- (b) making a transfer that would involve a transfer out of a guaranteed fund; 作出轉移時涉及從現有強積金賬戶轉出保證基金;
- (c) making an early withdrawal of accrued benefits from the MPF System; 或從強積金體系中提早申索累算權益; 或
- (d) making how much voluntary contributions into a particular registered scheme or a particular constituent fund. 向某一特定的註冊計劃或某一特定的成分基金注入何等金額之自願性供款。

Not applicable. The customer is not a *client with special needs*. 不適用。客戶並不是「需特別關注客戶」。
(Proceed to Section D. 下往 D 部。)

As a customer with special needs, the Intermediary has offered the customer the following options and the customer's decision on the options is marked as follow. 作為「需特別關注客戶」，中介人已向客戶提供下列選擇，而客戶對於該選擇的決定如下。

- to be accompanied by a companion to witness the relevant sales process and constituent fund selection process; 由一位朋友見證相關銷售及成分基金選擇過程;

Name of witness 見證人姓名

Signature of witness 見證人簽署

Date 簽署日期

- to have an additional member of staff to witness the relevant sales process and constituent fund selection process; or 由額外一名職員見證相關銷售及成分基金選擇過程; 或

Name of staff 職員姓名

Signature of staff 職員簽署

Date 簽署日期

- the customer decides not choosing the aforesaid choices by his/her own discretion. 客戶自行決定不選取上述選擇。

D. Transfer into the guaranteed fund provided under the Scheme (“Guaranteed Fund”) 將權益轉入本計劃內的保證基金(「保證基金」)

- Not applicable. Customer does not transfer fund into the Guaranteed Fund. 不適用。客戶沒有將權益轉入保證基金內。
(Proceed to Section E. 下往 E 部。)
- Customer understands and confirms that the Intermediary has: 客戶明白及確認中介人已：
- (i) explained the terms and conditions of the Guaranteed Fund with a particular focus on the qualifying conditions;
解釋保證基金的條款及條件，特別是附帶條件；
 - (ii) explained the circumstances when the customer will or will not meet the qualifying condition of the Guaranteed Fund;
解釋在甚麼情況下客戶會或不會符合保證基金的附帶條件；
 - (iii) explained the greater counterparty or credit risks associated with the guarantees based on an insurance policy as compared to those based on a unit trust. 解釋與其他以單位信託為基礎的基金相比，屬保險單形式的保證基金涉及較大交易對手失責風險或信貸風險。

E. Transferring out of guaranteed funds 從現有強積金賬戶轉出保證基金

- Not applicable. Customer does not currently have investments in any guaranteed funds. 不適用。客戶現時沒有投資於任何保證基金。
(Proceed to Section F. 下往 F 部。)
- Customer understands and confirms that the Intermediary has: 客戶明白及確認中介人已：
- (i) warned the customer that the transfer of the accrued benefits out of that guaranteed fund may cause some or all of the guarantee conditions not being satisfied, thus resulting in the loss of the guarantee.
警告客戶從保證基金轉出累積權益可以引致部份或全部保證條件不符合，因而喪失保證的回報；
 - (ii) advised the customer to check the offering document of his or her original scheme or consult his or her trustee before transferring his or her accrued benefits out of that guaranteed fund.
從保證基金轉出其累積權益前，建議客戶查閱其原有計劃的要約文件，或向其受託人查詢；
 - (iii) informed the customer the consequences of the termination of his/her investment in the guaranteed fund. The customer confirms that he or she understands the consequences of such termination.
告之客戶終止投資於保證基金的後果。客戶確認他或她明白上述終止的後果。

F. Acknowledgment and Signature 確認及簽署

The undersigned customer understands and confirms that:

1. During sales process and constituent fund selection process, **the Intermediary has not given any advice on constituent fund to the customer.**
在銷售及成分基金選擇過程期間，**中介人沒有向客戶提供任何成分基金方面的意見。**
2. The information given in this form / and its attachment (if any) is correct and complete.
本表格 / 及隨附文件(如有)所提供的資料均屬正確無訛且並無缺漏。
3. The customer has received a copy of the latest version of the offering document of the Scheme, and was advised to read carefully and understand the information contained therein prior to making the transfer and any other key MPF decisions.
客戶已收妥本計劃的最新版本之銷售文件，亦明白在作出累積權益轉移及任何其他重要之強積金決定前，應先仔細閱讀及充分理解銷售文件內所刊載的資訊。
4. The customer understands the timeframe involved in the transfer process and there will be a time lag during which the accrued benefits (if any) will not be invested. In any case, the customer has the right to seek professional financial advice when in doubt. 客戶明白轉移手續需時處理，期間將令累積權益(如有)出現投資真空期。無論如何，有關投資方面的疑問，客戶有權尋求專業投資意見。
5. The customer understands the rationale related to transfer or enroll in the MASS MPF Scheme. The advice given to the customer is based on the rationale of *scheme and fund choices/ fund management fees/ employer and member services/ other (if any) _____ (please specify). 客戶明白有關轉移或參與萬全強積金計劃的意見之理據。向客戶提供的意見乃基於*計劃及基金選擇/基金管理費/僱主及成員服務/其他(如有)_____ (請註明)的理據。

X _____
Signature of customer 客戶簽署

_____ Date 日期

X _____
Signature of Intermediary 中介人簽署

_____ Consultant Code 顧問編號

_____ Date 日期

Note 註:

1. * please delete if inappropriate 請刪除不適用者
2. The copy of this form will be provided to the customer (as referred to the hereabove). 本表格的副本將會提供給上方提及的客戶。