

YF Life Connect

萬通保險 Connect

Client Installation Guide & User Manual

安裝指南及用戶手冊

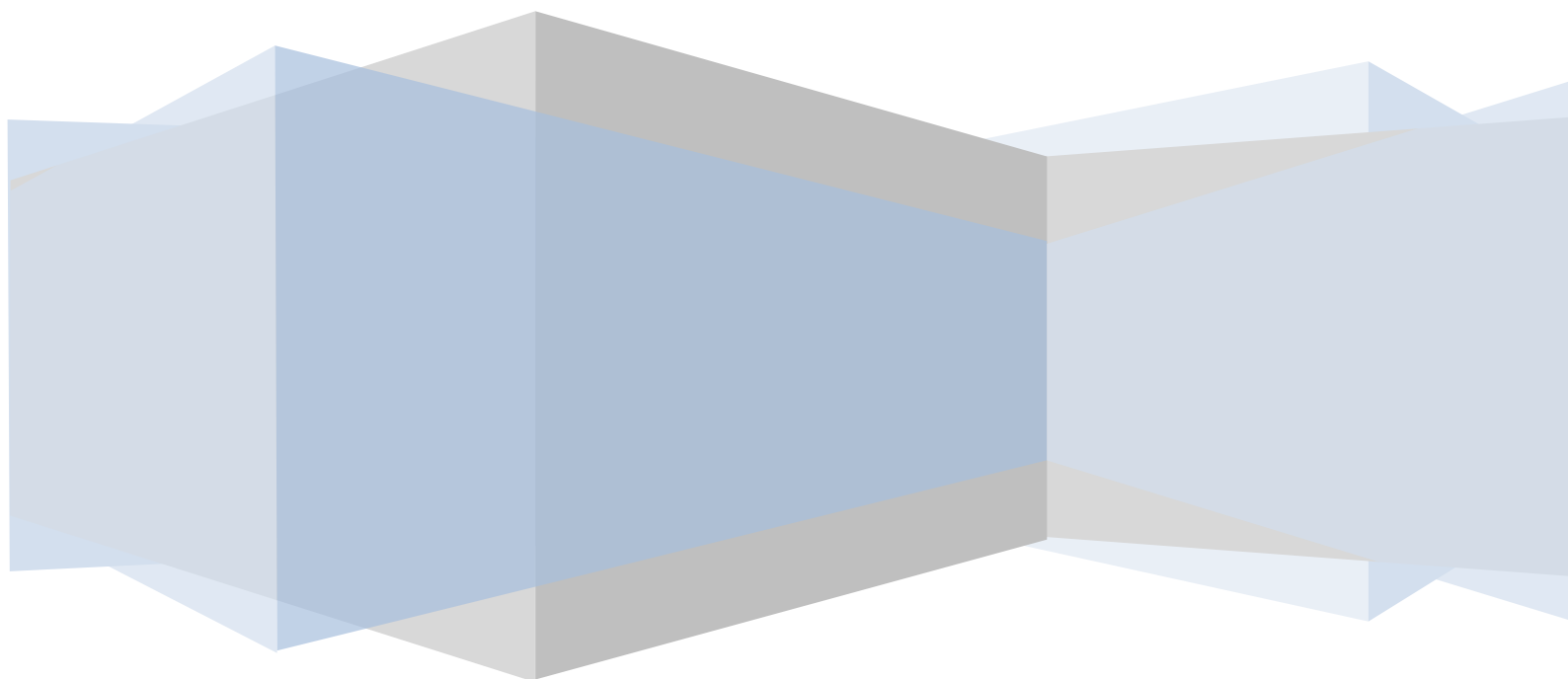


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1) INSTALLATION 安裝

1.1 Download YF Life Connect 下載萬通保險 Connect

To install the Mobile Apps of the YF Life Connect, it is required to install “YF Life Connect” via PlayStore/ AppStore

安裝萬通保險 Connect 的行動應用程式，需要通過 PlayStore/ AppStore 安裝“萬通保險 Connect”



Upon the completion of the installation of “YF Life Connect”, it is also required to install the “YF Life IM” via PlayStore/AppStore

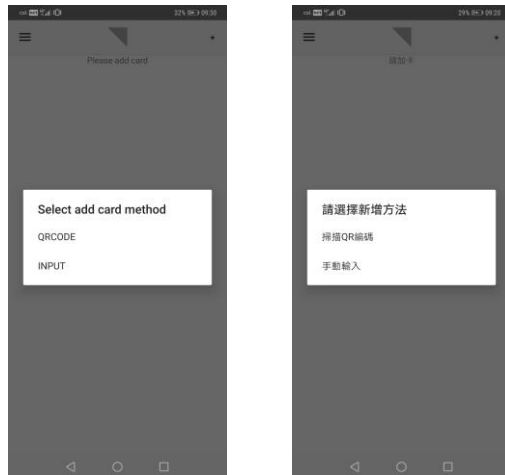
完成“萬通保險 Connect”的安裝後，還需要通過 PlayStore/ AppStore 安裝“萬通保險 IM”



1.2 Add Mass MPF Card 新增萬全強積金卡

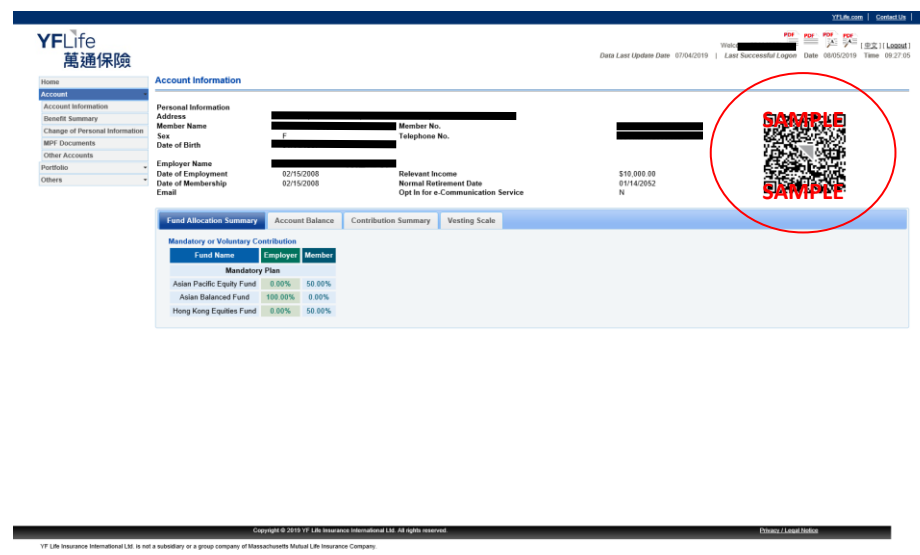
Scheme member can add the Mass MPF Card by the following ways 計劃成員可以通過以下方式添加萬全強積金卡：

- QR Code 二維條碼
- Manual Input 手動輸入



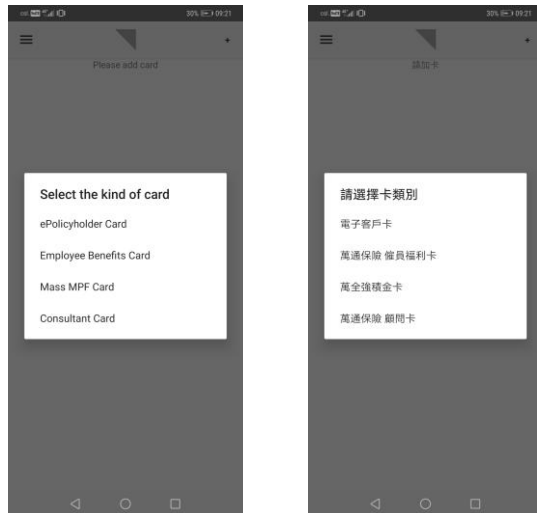
By QR Code 選用二維條碼:

- The QR Code is available in MPF Enquiry System 強積金查詢系統提供相關二維條碼

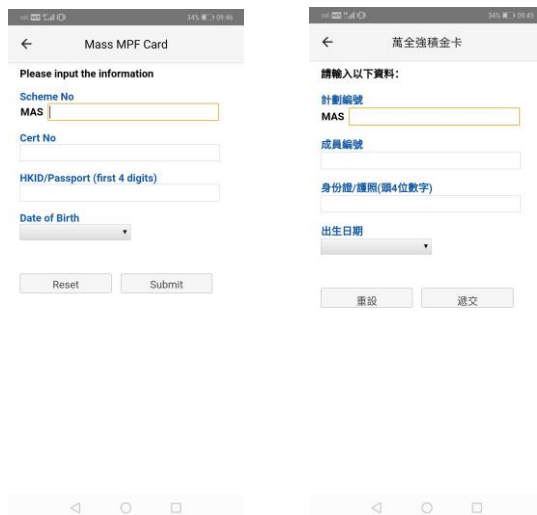


By Manual Input 選用手動輸入:

- Select Mass MPF Card 選擇萬全強積金卡



- Input the required information for registration 輸入註冊所需的資料



- Input email address and “✓” the box if the scheme member consents to Opt-in the e-communication service 輸入電子郵件地址，如果計劃成員同意選擇加入電子通信服務，請“✓”選框

Mass MPF Card

Opt-in for YF Life Trustee e-Communication Service

Email
abc@gmail.com
Re-enter Email
abc@gmail.com

Opt In*

☒ I agree to use the e-communication service provided by YF Life Trustees Ltd.

* Please note that once your application is processed, all notices and benefit-statement notifications regarding the MASS Mandatory Provident Fund Scheme will automatically be sent to this email address in the future. Hard copies of the notices and benefit statements will no longer be mailed to you.

Reset Submit

萬通保險 強積金卡

選用電子通訊服務

電郵地址
abc@gmail.com
重新輸入電郵
abc@gmail.com

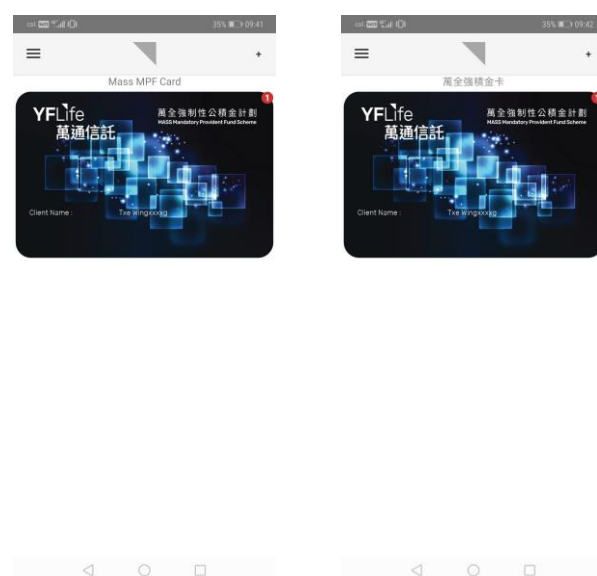
選用*

☒ 本人同意使用萬通信託有限公司的電子通訊服務

* 請注意，當有關申請經處理後，今後所有與萬全強制性公積金計劃有關的通訊及權益報表通知將自動送達至此電郵地址，從而取代印刷本的通訊及權益報表。

重設 遞交

- Registration completed 註冊完成



1.3 Security Control 保安指引

Before using the YF Life Connect, the scheme member is required to setup a password for account login & SMS verification 使用萬通保險 Connect 之前，計劃成員需要為帳戶登錄設置密碼及短訊服務核實：

Security Setup
Section 1: Setup Password
Please setup your [Connect] password

Password

Re-enter password

Password Requirement

- ✓ At least 8 characters long
- ✓ Contains 1 capital letter, 1 lower case letter and 1 number
- ✓ Re-entered password matches

Section 2: Password Recovery

Code - Mobile Number

VERIFY

* It will be used to verify your identity and help recover your password if you ever forget it.

☒ Enable "Biometric Authentication"

RESET **SAVE**

安全設定
第一部份：設定密碼
請設定您的[Connect]密碼

密碼

重新輸入密碼

密碼要求

- ✓ 最少8字元長
- ✓ 包含1個大寫、1個小寫、1個數字
- ✓ 重新輸入之密碼吻合

第二部份：密碼復原選項

區碼 - 手機號碼

驗證

* 如果日後忘記了密碼，此驗證碼將可驗證你的身份並還原密碼。

☒ 啟用「生物認證」

重設 **儲存**

- Forget Password 忘記密碼

Security Setup
Recover your password by mobile authentication

Mobile Number

852 - 92****42

CANCEL **VERIFY**

安全設定
認證您的手機號碼來取回密碼

手機號碼

852 - 92****42

取消 **認證**

2) FUNCTIONS 功能

2.1 Functional Bubbles 功能選項

Total 7 functional bubbles are displayed in main menu for scheme member to manage his/her MPF accounts 主目錄中共顯示 7 個功能選項供計劃成員管理強積金帳戶：

- MPF Account 強積金帳號
- Investment Instructions 投資指示
- My e-Documents 我的文件
- Change of Information 資料更改
- Constituent Fund 成分基金
- Notification 通知
- Contact us 聯絡我們

2.1.1 MPF Account 強積金帳號



Select (1) Fund Allocation Summary 選擇（1）投資基金百分比摘要：

- Fund Allocation Summary 投資基金百分比摘要 -> Plan Type (if any) 計劃類別 (如有)
-> View the Fund Allocation 查閱投資基金百分比

Select (2) Benefit Summary 選擇（2）權益摘要：

- Benefit Summary 權益摘要 -> View the Asset Value 查閱資產總值

2.1.2 Investment Instructions 投資指示



Client Name : Chan Tai Man
Scheme No : MAS00001455744
Scheme Type : Regular Employee
Cert No : 14
Date Join Scheme : 07/01/2006



成員姓名 : 陳大文
計劃編號 : MAS00001455744
計劃類別 : 一般僱員
成員編號 : 14
參加計劃日期 : 07/01/2006

Express Investment Instruction
MAS00001455744000 - 000014
[Express Fund Allocation](#)
[Express Fund Switching](#)

快易投資指示
MAS00001455744000 - 000014
[快易投資基金分配](#)
[快易基金轉換](#)

Select Express Fund Allocation 選擇快易投資指示:

- Change Fund Allocation 更改投資基金百分比 -> Contribution Type (if any) 供款類別 (如有) -> New Fund Allocation 新的投資基金分配 -> Confirm Order 確認更改 -> Acknowledgment 確認申請

Change Fund Allocation


- ☒ Mandatory Contribution
- ☐ Voluntary Contribution
- ☐ Irregular Voluntary Contribution
- ☐ Irregular Voluntary Contribution

[+ e-Change on Constituent Funds Terms and Conditions](#)

[I Agree](#) [I Disagree](#)



Change Fund Allocation


Your future contributions and accrued benefits transferred from another Registered Scheme will be invested in accordance with the new allocation percentage.

☐ Mandatory Contribution

Existing Allocation
1) MPF Conservative Fund (CAPF)
Employer: 100% Member: 100%



[Back](#) [Next](#) Total 0%

▲ Your request is not yet completed!

Please confirm your request. All your instructions once processed by us may not be amended, cancelled or withdrawn. You will receive an acknowledgment after pressing the [Confirm] button. If you are unable to receive an acknowledgment due to computer/network failure or any other reason, please click on 'Fund Allocation Change History' in the 'Portfolio' web page to check for the record of your submission. If the request is not displayed in the Record, this means that the request has not been submitted successfully. In that case, please submit your request again.

Mandatory Contribution
Existing Allocation
MPF Conservative Fund (CAPF) Employer: 100% Member: 100%

Make Allocation

Back Confirm Cancel



Acknowledgment - Change Fund Allocation

Your request is submitted on 2018/05/29, 10:20:52. Confirmation on change of investment mandate will be sent to you within 2 weeks after the transaction was completed to confirm the Change has been processed. If you do not receive any confirmation on change of investment mandate within 2 weeks after your submission of this form to us, please contact us immediately.

Mandatory Contribution
Guaranteed Fund (GUAF) 100%

I have read and understood the principal

Save

更改投資基金百分比

☒ 強制性供款
☐ 自願性供款
☐ 非規律性自願供款
☐ 非規律性自願供款
 「網上更改成分基金」之條款及條件

本人同意 本人不同意



更改投資基金百分比

您的未來供款及轉移自另一註冊計劃的累積權益將會按照新的基金分配百分比作出投資

☐ 強制性供款

現有組合
1) 強積金保守基金 (CAPF)
僱主: 100% 成員: 100%

總和 0%

備主

上一步 下一步

▲ 閣下之申請仍未完成!

請確認閣下的申請。所有閣下的指示一經我們處理後，一概不得更改、取消或撤回。閣下將於按下[確認]

強制性供款
現有組合
強積金保守基金 (CAPF) 僱主: 100% 成員: 100%

新組合
保證基金 (GUAF) 100%

閣下申請的任何成分基金百分比更改不會即時於網上反映。

☒ 本人在遞交是次申請前已詳閱及完全明白萬全強制性公積金計劃的主要推銷刊物(包括成分基金及收費表)。有關成分基金及其分配比率完全為本人之決定，附屬中介人完全沒有就此向本人提供任何意見或影響本人之決定。

上一步 確認 取消



確認 - 更改投資基金百分比

閣下的申請於 2018/05/29, 10:19:34 遞交。投資委託書更改確認書將會於交易完成後的兩週內寄予閣下，以確認有關轉換或更改已辦妥。如果閣下於遞交本表格後兩週內仍未收到投資轉換表或投資委託書更改確認書，請盡快聯絡我們。

強制性供款
保證基金 (GUAF) 100%

本人在遞交是次申請前已詳閱及完全明白萬全強制性公積金計劃的主要推銷刊物(包括成分基金及收費表)。有關成分基金及其分配比率完全為本人之決定，附屬中介人完全沒有就此向本人提供任何意見或影響本人之決定。

重要事項：

儲存

Select Express Fund Switching 選擇快易基金轉換:

- Fund Switching 基金轉換 -> Contribution Type (if any) 供款類別 (如有) -> Switch Out Fund 轉出基金 -> Switch In Fund 轉入基金 -> Confirm Order 確認轉換 -> Acknowledgment 確認申請

Contribution Type

☒ Mandatory Plan
☐ Voluntary Plan
☐ Irregular Voluntary Contribution
☐ Irregular Voluntary Contribution
 e-Change on Constituent Funds Terms and Conditions

Select Switch Out Fund

☐ MPF Conservative Fund (CAPF)
 \$187,522.09
☒ Global Equity Fund (GLEF)
 \$49,851.00
 Unit Price: 28.3929
 Unit: 1,755.7558
 Employer: 1,494.6396
 Member: 261.1162
 %
☐ Asian Pacific Equity Fund (APEF)
 \$48,969.34
☐ European Equity Fund (EUEF)

Select Switch In Fund

☒ Default Investment Strategy (DIS)
 %
☐ Global Stable Fund (GLSF)
☐ Global Growth Fund (GLGF)
☐ Guaranteed Fund (GUAF)
☐ MPF Conservative Fund (CAPF)
☐ Global Bond Fund (GLBF)
☐ Asian Balanced Fund (ASBF)
☐ Asian Pacific Equity Fund (APEF)
☐ US Equity Fund (USEF)
☐ European Equity Fund (EUEF)
☐ Hong Kong Equities Fund (HKEF)
☐ Greater China Equity Fund (GCEF)

Total 100%

Confirm Switching Orders

Your request is submitted on 2018/05/29, 11:16:37. Confirmation on change of investment mandate will be sent to you within 2 weeks after the transaction was completed to confirm the Switching or Change has been processed. If you do not receive any fund switching statement or confirmation on change of investment mandate within 2 weeks after your submission of this form to us, please contact us immediately.

Mandatory Plan
 Sell 50% Global Equity Fund (GLEF)
 Buy 100% Default Investment Strategy (DIS)

Important Notes :

供款類別

☒ 強制性計劃
☐ 自願性計劃
☐ 非規律性自願供款
☐ 非規律性自願供款
 「網上更改成分基金」之條款及條件

選擇轉出基金

☒ 強積金保守基金 (CAPF)
 \$187,522.09
 單位價格: 10.8163
 單位: 17,336.9904
 僱主: 4,686.5691
 成員: 12,650.4213
 %
☐ 環球證券基金 (GLEF)
 \$49,851.00
☐ 亞太股票基金 (APEF)
 \$48,969.34
☐ 歐洲股票基金 (EUEF)
 \$24,245.74

請確認閣下的申請。所有閣下的指示一經我們處理後，一概不得更改、取消或撤回。
閣下將於按下[確認]

預設投資策略 (DIS)
100 %
總和 100%

強制性計劃
賣出 100% 強積金保守基金 (CAPF)
買入 100% 預設投資策略 (DIS)
閣下申請的任何成分基金轉換記錄不會即時於網上反映。

聲明：
☒ 本人在遞交是次申請前已詳閱及完全明白萬全強制性公積金計劃的主要推銷刊物(包括成分基金及收費表)。有關成分基金及其分配比率完全為本人之決定，附屬中介人完全沒有就此向本人提供任何意見或影響本人之決定。

上一步 下一步 確認 取消 儲存

閣下的申請於 2018/05/29, 11:18:16 遞交。投資委託書更改確認書將會於交易完成後的兩週內寄予閣下，以確認有關轉換或更改已辦妥。如果閣下於遞交本表格後兩週內仍未收到投資轉換表或投資委託書更改確認書，請盡快聯絡我們。

強制性計劃
賣出 100% 強積金保守基金 (CAPF)
買入 100% 預設投資策略 (DIS)

+ 重要事項：

2.1.3 My e-Documents 我的文件

Client Name: Chan Tai Man
Scheme No: MAS00001455744
Scheme Type: Regular Employee
Cert No: 14
Date Join Scheme: 07/01/2006

成員姓名: 陳太文
計劃編號: MAS00001455744
計劃類別: 一般僱員
成員編號: 14
參加計劃日期: 07/01/2006

Select (1) Benefit Statement 選擇（1）權益報表:

- Benefit Statement 權益報表 -> Select Statement 選擇報表-> View Statement 查閱報表

Select (2) My e-Documents 選擇（2）我的文件:

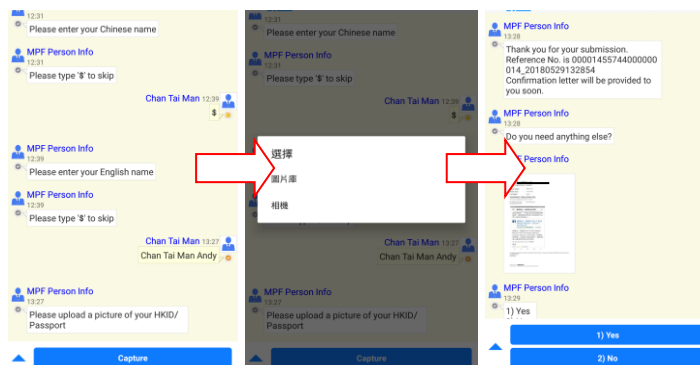
- My e-Documents 我的文件 -> Select e-Documents 選擇文件-> View e-Documents 查閱文件

2.1.4 Change of Information 資料更改



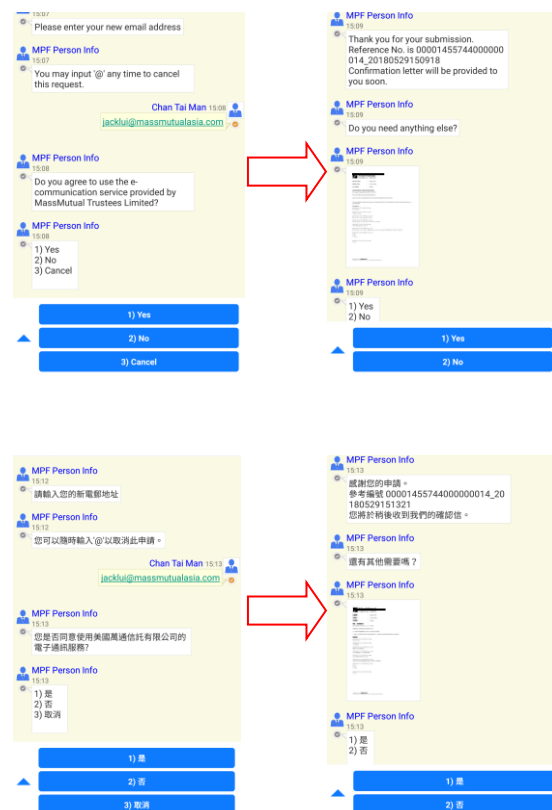
Select (1) Name 選擇 (1) 姓名:

- Personal Information Collection Statement 收集個人資料聲明 -> Name 姓名-> Input new Chinese Name (if any) 輸入中文姓名 (如有) -> Input new English Name (if any) 輸入英文姓名 (如有) -> Upload HKID/ Passport Copy 上載身份證明文件/ 護照副本-> Acknowledgment 確認申請



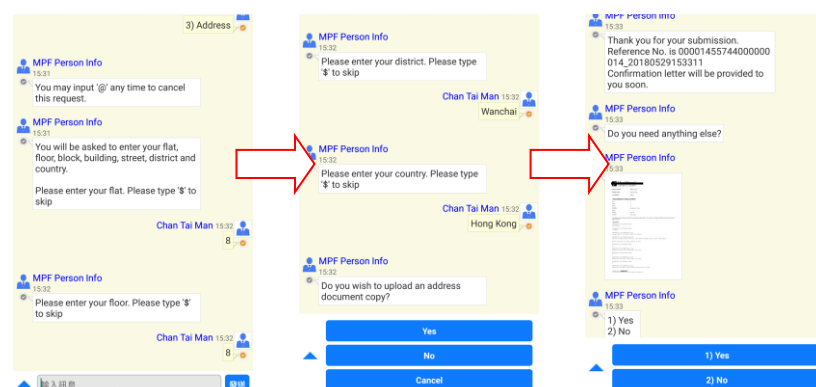
Select (2) Email Address 選擇 (2) 電郵地址:

- Email Address 電郵地址-> Input new Email Address 輸入新的電郵地址 -> Ask for Opt-in the e-Communication Service 選擇是否參加電子通信服務 -> Acknowledgment 確認申請



Select (3) Address 選擇 (3) 地址:

- Address 地址-> Input new Address 輸入新的地址 -> Upload Address Proof (Optional) 上載地址證明 (可自行選擇) -> Acknowledgment 確認申請





Select (4) Telephone Number 選擇 (4) 電話號碼:

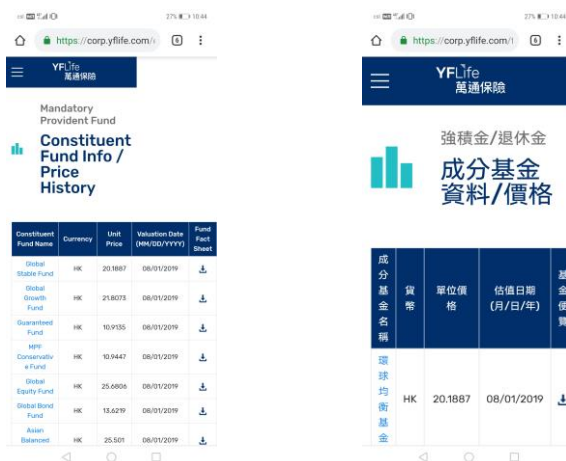
- Telephone Number 電話號碼-> Input new Telephone Number 輸入新的電話號碼 -> Acknowledgment 確認申請



2.1.5 Constituent Fund 成分基金



- Constituent Fund 成分基金-> Direct to Company Website to view the Constituent Fund Information/ Price History 直接進入公司的網站以查閱 成分基金資料/ 價格歷史



2.1.6 Notification 通知

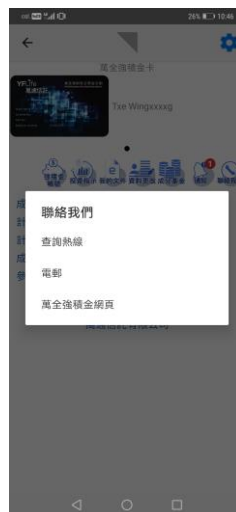
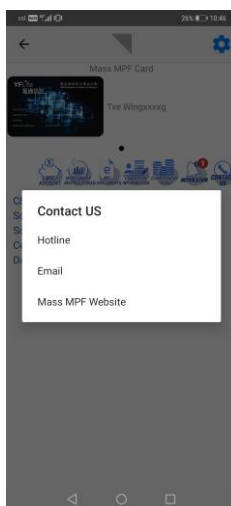


- Notification 通知 -> Alert scheme member to view the new coming Benefit Statement/ e-Documents under the functional bubble – “My e-Documents” 提醒計劃成員在功能選項下 “我的文件” 中查看新出現的權益報表/ 電子文件

2.1.7 Contact us 聯絡我們

Client Name : Chan Tai Man
Scheme No : MAS00001455744
Scheme Type : Regular Employee
Cert No : 14
Date Join Scheme : 07/01/2006

成員姓名 : 陳大文
計劃編號 : MAS00001455744
計劃類別 : 一般僱員
成員編號 : 14
參加計劃日期 : 07/01/2006



--- End ---

--- 完 ---