

SUN LIFE RAINBOW MPF SCHEME
SWITCHING / CHANGE OF INVESTMENT MANDATE FORM
永明彩虹強積金計劃
投資轉換/更改投資授權表格

1. This form will supersede any previous instruction(s) which has/have been submitted to the Administrator.
2. All sections below should be completed in English and in BLOCK letters.
 1. 本表格所列之更改將取代所有其他之前已遞交行政管理人的指示。
 2. 所有部份須以英文正楷填寫。

成員姓名 Member Name	_____	成員編號 Member Number	_____
聯絡電話號碼 Contact Telephone	_____	香港身份證/護照號碼 HKID/Passport No.	_____
僱主名稱 Employer Name	_____	僱主編號 Employer Number	_____

Please tick (✓) the appropriate box 請在適當方格加上 (✓)

PART I 第一部份: SELECTION OF FUND CRUISER 選擇基金自動導航系統

I wish to switch my future monies (including contributions and transfer-in monies) and existing balances to Fund Cruiser, which will be invested in accordance with the pre-determined fund choices based on my age and the investment mandate for future monies automatically changed and existing balance automatically switched on my birthday or the first business day following my birthday (if the birthday falls on a non-business day).

本人欲將未來供款(包括供款及由其他計劃轉入的款項)及現有結餘轉換至基金自動導航系統, 依照本人年齡根據預設基金選擇而作出投資, 其後亦會隨本人的年齡遞增而於本人生日當天或生日後之下一個工作日(如生日當天不是工作天)自動作出更改未來供款的投資授權和自動轉換現有結餘。

Please skip Part II if you have selected Part I. 請略過第二部份如閣下已選擇第一部份

PART II 第二部份: CHANGE OF INVESTMENT MANDATE 更改投資授權 OR SWITCHING 投資轉換

Note: (only applicable to member who has already selected Fund Cruiser as investment choice): After the instruction below in either (i) or (ii) has been effected, Fund Cruiser will cease to apply to your future monies (including contributions and transfer-in monies from other schemes) and existing balances. For more details, please refer to important note (1) of this form.

備註: (只適用於已選擇基金自動導航系統作為投資選擇的成員): 如以下(i)或(ii)之指示執行後, 基金自動導航系統將不再適用於閣下的將來供款(包括供款及由其他計劃轉入的款項)及現有結餘。有關詳情, 請參閱本表格的重要說明(1)。

(i) **CHANGE OF INVESTMENT MANDATE 更改投資授權 (CHANGE APPLIES TO ALL FUTURE MONIES RECEIVED INCLUDING CONTRIBUTIONS AND TRANSFER-IN MONIES) (適用於更改所有將來的供款及自其他強積金或職業退休計劃轉入之款項)**

Each investment must be in multiples of 5%. 每項投資必須為 5% 的倍數。

Constituent Fund 成份基金	Mandatory Contribution 強制性供款	Voluntary Contribution 自願性供款	
		Employer's portion 僱主部分	Member's Portion 成員部分
風險程度 Risk Level : 保守 Conservative			
永明首域強積金保守基金 Sun Life First State MPF Conservative Fund	CRCPF _____ %	_____ %	_____ %
風險程度 Risk Level : 平穩 Stable			
永明首域強積金環球債券基金 Sun Life First State MPF Global Bond Fund	SLFGB _____ %	_____ %	_____ %
永明首域強積金定息基金 Sun Life First State MPF Fixed Income Fund	CRFIG _____ %	_____ %	_____ %
風險程度 Risk Level : 均衡 Moderate			
永明RCM強積金穩定資本基金 Sun Life RCM MPF Capital Stable Fund	SLRCS _____ %	_____ %	_____ %
永明首域強積金平穩基金 Sun Life First State MPF Stable Income Fund	CRSIF _____ %	_____ %	_____ %
風險程度 Risk Level : 增長 Growth			
永明RCM強積金穩定增長基金 Sun Life RCM MPF Stable Growth Fund	SLRSG _____ %	_____ %	_____ %
永明首域強積金均衡基金 Sun Life First State MPF Balanced Portfolio Fund	CRBPF _____ %	_____ %	_____ %
永明RCM強積金均衡基金 Sun Life RCM MPF Balanced Fund	SLRBF _____ %	_____ %	_____ %
永明首域強積金增長基金 Sun Life First State MPF Progressive Growth Fund	CRPGF _____ %	_____ %	_____ %
風險程度 Risk Level : 進取 Aggressive			
永明景順強積金環球股票基金 Sun Life Invesco MPF Global Equities Fund	SLIGE _____ %	_____ %	_____ %
永明RCM強積金亞洲股票基金 Sun Life RCM MPF Asian Equity Fund	SLRAE _____ %	_____ %	_____ %
永明首域強積金香港股票基金 Sun Life First State MPF Hong Kong Equity Fund	CRHKE _____ %	_____ %	_____ %
永明景順強積金香港及中國股票基金 Sun Life Invesco MPF Hong Kong and China Equity Fund	SLIHC _____ %	_____ %	_____ %
總和 Total:	100 %	100 %	100 %



(ii) SWITCHING (SWITCHING APPLIES FOR EXISTING BALANCE ONLY) 投資轉換 (只適用於轉換現有的結餘)

Constituent Fund 成份基金	From 由 (Please chooses ONE option only. 請選擇其中一項)			To 至
	Option 1 選擇一	Option 2 選擇二 (Switch out 100% of fund selected 轉出所選基金之 全部結餘)	Option 3 選擇三 (Switch out specified % of the balance of the fund selected 轉出所選基金結餘之百分率)	% of Share (In multiple of 5%) 轉調至新基金 之百分率 (5%的倍數)
風險程度 Risk Level : 保守 Conservative 永明首域強積金保守基金 Sun Life First State MPF Conservative Fund	CRCPF	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
風險程度 Risk Level : 平穩 Stable 永明首域強積金環球債券基金 Sun Life First State MPF Global Bond Fund	SLFGB	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
永明首域強積金定息基金 Sun Life First State MPF Fixed Income Fund	CRFIG	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
風險程度 Risk Level : 均衡 Moderate 永明RCM強積金穩定資本基金 Sun Life RCM MPF Capital Stable Fund	SLRCS	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
永明首域強積金平穩基金 Sun Life First State MPF Stable Income Fund	CRSIF	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
風險程度 Risk Level : 增長 Growth 永明RCM強積金穩定增長基金 Sun Life RCM MPF Stable Growth Fund	SLRSG	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
永明首域強積金均衡基金 Sun Life First State MPF Balanced Portfolio Fund	CRBPF	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
永明RCM強積金均衡基金 Sun Life RCM MPF Balanced Fund	SLRBF	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
永明首域強積金增長基金 Sun Life First State MPF Progressive Growth Fund	CRPGF	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
風險程度 Risk Level : 進取 Aggressive 永明景順強積金環球股票基金 Sun Life Invesco MPF Global Equities Fund	SLIGE	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
永明RCM強積金亞洲股票基金 Sun Life RCM MPF Asian Equity Fund	SLRAE	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
永明首域強積金香港股票基金 Sun Life First State MPF Hong Kong Equity Fund	CRHKE	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
永明景順強積金香港及中國股票基金 Sun Life Invesco MPF Hong Kong and China Equity Fund	SLIHC	<input type="checkbox"/> 100%	Switch out 轉出 _____ %	_____ %
			Total 總和:	100 %

IMPORTANT NOTE 重要說明

1. New investment choice stated in Part II (i) will apply to future contributions/money to be transferred in after the instruction has been effected. Switching instruction stated in Part II (ii) will apply to the existing account balance only and will not be applied to contributions/transfer-in monies in process (whether they come in before or after BestServe received the new switching instruction). Contributions/transfer-in monies in process will be allocated according to the old investment strategy. 第二部份(i)的新投資組合只有在於指示獲得執行後，方可應用於未來供款/待轉入款項。第二部份(ii)的轉換指示僅適用於賬戶現有結餘，並不適用於在處理中之供款/待轉入款項(無論供款於卓譽收妥新的轉換指示之前或之後收到)。處理中之供款/待轉入款項將根據舊的投資選擇作出分配。

2. (Only applicable to member who has already selected Fund Cruiser as investment choice): After the instruction above in either Part II(i) or (ii) has been effected, Fund Cruiser will cease to apply to your future monies (including contributions and transfer-in monies) and existing balances. (只適用於已選擇基金自動導航系統作為投資選擇的成員): 如以上第二部份(i)或(ii)之指示執行後，基金自動導航系統將不再適用於閣下的未來供款(包括供款及由其他計劃轉入的款項)及現有結餘。

3. If more than one instruction are received from you in respect of same/different transactions (whether by one or more means, e.g. through the Websites and by post) on any single day, BestServe has the sole discretion to determine the priority in dealing with such instructions. In such event, there may be some delay in executing such instruction or instructions and BestServe shall not be liable for any direct, indirect, special or consequential loss or damages arising from such delay. 倘卓譽於任何一日內收到閣下就相同或不同交易發出超過一項指示(不論是否透過一種或多種途徑發出，例如透過網站及以郵寄方式)，卓譽可全權酌情決定處理該等指示之先後次序。在該情況下，該等指示之執行或會出現延遲，卓譽毋須對因延遲而招致之任何直接、間接、特別或相應損失或損害承擔責任。

4. Any failure to comply with the above conditions will result in delay in processing. 如未能符合上述規定，將導致指示被延遲執行。

5. After your request is processed, you will receive "Confirmation of Switching/Change of Investment Mandate". Upon receipt of that confirmation, please examine and report any error found immediately. In the absence of any objection within 10 days from the issue date, that confirmation shall be deemed to be conclusive and binding on you. You can also use our Interactive Voice System or Online Pension Services Centre at www.sunlife.com.hk to check if the corresponding requests have been completed 14 business days after you mail out this form. If you have any question on the status of your instruction, please contact our Sun Life Pension Services Hotline at 3183-1888. 當閣下之申請獲處理後會接獲【投資轉換/更改投資授權確認書】，煩請閣下接獲此書後立即加以驗證，並將不符之處即時通知本公司。如於此函件發出後十日內閣下未有作出任何異議，此確認書將被當作為最終具約束力之文件。閣下亦可於寄出表格後十四個工作天，利用自動電話服務或網上退休金服務中心www.sunlife.com.hk，查證有關更改事宜。倘閣下有任何疑，請致電永明退休金服務熱線 3183-1888。

I, the Member, hereby authorise the Trustee of Sun Life Rainbow MPF Scheme (the 'Scheme') to execute the above investment instruction for my account. I have read the latest Principal Brochure of the Scheme and understand that it is a general guide and does not constitute investment advice. I agree all the above information:- 本人作為成員，茲授權永明彩虹強積金計劃(「計劃」)受託人為本人賬戶執行上述投資指示。本人已經閱讀計劃最新《主要推銷刊物》(Principal Brochure)且明白其僅為一般指引，並不構成投資意見。本人同意以上所有資料：

(a) will be used for (i) the administration of my contributions and accrued benefits under Sun Life Rainbow MPF Scheme; (ii) conducting direct marketing activities of the Trustee or its associated companies; (iii) compliance with the applicable laws and regulations; and (iv) any other purposes related to the above; 應被用於(i)永明彩虹強積金計劃下的本人的供款和累積權益的行政事宜 和管理；(ii)進行信託人或其相聯公司的直接市場推廣活動；(iii)遵守適用法律和規例；及(iv)與上述有關的任何其他用途；

(b) may be made available to other third parties which the Trustee considers appropriate; and 可提供給受託人認為適當的任何第三者；及

(c) is provided on a voluntary basis and failure to supply information may result in the Trustee being unable to process the change(s) requested/submitted in this form. 是本人以自願性質向受託人提供的。但是，未能提供資料可能導致受託人不能處理本申請。

I can obtain access to and request correction of any of my personal information by writing to the Manager, Pensions Administration Department, BestServe Financial Limited. 本人有權查閱並且要求更正受託人所持有的本人個人資料。如要求查閱，可通過書面方式向卓譽金融服務有限公司退休金管理部經理提出。

Signature of Member 成員簽署

Date 日期(dd /mm /yyyy 年)