

Please read the Explanatory Notes carefully before completing.

填寫此表格前，請先細讀填報須知。

All sections below should be completed in English BLOCK letters except your Chinese name.

除了個人資料內的中文名稱外，所有部份須以英文正楷填寫。

Sun Life Rainbow MPF Scheme

SCHEME MEMBER'S REQUEST FOR FUND TRANSFER FORM [MPF(S)-P(M)]

永明彩虹強積金計劃

計劃成員資金轉移表格 [MPF(S)-P(M)]

Part I Details of Scheme Member 第一部份 計劃成員資料

Name (English) 姓名(英文)		(Surname 姓)		(Given Names 名)	
Name (Chinese) 姓名(中文)		(Surname 姓)		(Given Names 名)	
		Title 稱銜	Mr/Ms/Miss/Others* 先生/女士/小姐/其他*		
HKID / Passport No.* (Note 2) 香港身份證 / 護照號碼* (註二)		Email Address 電郵地址			
Telephone No. 電話號碼	Home 住宅	Mobile /Pager* 手提電話 / 傳呼機*		Fax No. 傳真號碼	
Correspondence Address 通訊地址					
Reason for Transfer (For Self-employed Person only) 轉移的原因 (只適用於自僱人士)					
*Please delete whichever is inappropriate 請刪除不適用者					
a. <input type="checkbox"/> Ceased to be self-employed on 終止自僱 (dd 日/mm 月/yyyy 年)					
b. <input type="checkbox"/> Transfer to another self-employed person account in master trust scheme / industry scheme* with effect from 轉移至另一個集成信託計劃/行業計劃*內的自僱人士帳戶，生效日期為 (dd 日/mm 月/yyyy 年)					

Part II Fund Transfer Information 第二部份 資金轉移資料

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

Details of the account from which accrued benefits derived from mandatory contributions are to be transferred 擬轉移源自強制性供款的累算權益帳戶資料:	
Name of the Trustee 受託人名稱	
<input type="checkbox"/> Sun Life Trustee Company Limited 永明信託有限公司	
<input type="checkbox"/> Others, please specify 其他，請註明	
Name of the Scheme 計劃名稱	
<input type="checkbox"/> Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	
<input type="checkbox"/> Others, please specify 其他，請註明	
Membership Number 成員編號	

Part III Fund Transfer Options (Note 3) 第三部份 轉移資金的選擇 (註三)

1 I elect to have the accrued benefits derived from mandatory contributions in my account stated in Part II above transferred as follows: (please ✓ the appropriate box) 本人選擇把以上第二部份所註明的本人帳戶內由強制性供款衍生的累算權益作出下列的轉移：(請在適當的方格內填上 ✓ 號)

(a) To my contribution account with my new employer. Details of the account are 轉移至本人在新僱主就本人所開立的供款帳戶，此供款帳戶詳情如下：

Name of New Employer 新僱主名稱	
New Employer's Participation Number (Note 4) 新僱主參與編號 (註四)	
Name of the Trustee 受託人名稱	
<input type="checkbox"/> Sun Life Trustee Company Limited 永明信託有限公司	
<input type="checkbox"/> Others, please specify 其他，請註明	
Name of the Scheme 計劃名稱	
<input type="checkbox"/> Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃	
<input type="checkbox"/> Others, please specify 其他，請註明	
Membership Number (Note 5) 成員號碼 (註五)	

For transferring to your contribution account with Sun Life Rainbow MPF Scheme, please forward this form to BestServe Financial Limited, 22/F, China Resources Building, 26 Harbour Road, Wanchai, Hong Kong (Tel 3183 1888 Fax 3183 1889). Otherwise, please forward this form to the trustee of the new scheme as completed above.

如欲轉移至閣下於永明彩虹強積金計劃之供款帳戶，請把此表格交予卓譽金融服務有限公司，香港灣仔港灣道 26 號華潤大廈 22 樓(電話 3183 1888 傳真 3183 1889)。否則，請把此表格交予以上填寫之新計劃受託人。



- (b) To my existing/new* account in a master trust scheme/industry scheme* with details as below:
轉移至本人於集成信託／行業計劃中的現有／新帳戶內，資料如下：

Name of the Trustee 受託人名稱

- Sun Life Trustee Company Limited 永明信託有限公司
 Others, please specify 其他，請註明 _____

Name of the Scheme
計劃名稱

- Sun Life Rainbow MPF Scheme 永明彩虹強積金計劃
 Others, please specify 其他，請註明 _____

Membership Number ^(Note 5)
成員號碼 ^(註五) _____

For transferring to your preserved account with Sun Life Rainbow MPF Scheme, please forward this form to BestServe Financial Limited, 22/F, China Resources Building, 26 Harbour Road, Wanchai, Hong Kong (Tel 3183 1888 Fax 3183 1889). Otherwise, please forward this form to the trustee of the new scheme as completed above.

如欲轉移至閣下於永明彩虹強積金計劃之保留帳戶，請把此表格交予卓譽金融服務有限公司，香港灣仔港灣道 26 號華潤大廈 22 樓(電話 3183 1888 傳真 3183 1889)。否則，請把此表格交予以上填寫之新計劃受託人。

- (c) Retained in a Preserved Account in the current scheme.
保留於現有計劃內的保留帳戶。

Please forward this form to BestServe Financial Limited, 22/F, China Resources Building, 26 Harbour Road, Wanchai, Hong Kong (Tel 3183 1888 Fax 3183 1889).

請把此表格交予卓譽金融服務有限公司，香港灣仔港灣道 26 號華潤大廈 22 樓(電話 3183 1888 傳真 3183 1889)。

- 2 I elect to have the accrued benefits derived from voluntary contributions, if any, arranged as follows :(please ✓ the appropriate box) 本人選擇從自願性供款(如有)衍生的累算權益作出以下的安排：(請在適當的方格內填上 ✓ 號)
- withdrawn in accordance with the governing rules of the scheme and paid by cheque 根據計劃的管限規則提取權益，並以支票支付
- handled in the same way as those derived from mandatory contributions (if no choice is indicated in this question, this is the default option) 與強制性供款衍生的累算權益之處理方式相同(如沒有任何選擇，此項目會作為選定之答案)
- 3 I hereby attach a photocopy of my HKID card/passport* for verification of the identity card/passport* number 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。本人因此毋需為受託人的核對工作親身出示香港身份證／護照*。

Part IV Declaration 第四部份 聲明

The Claimant/Scheme Member named above hereby acknowledges that all information provided herein to Sun Life Trustee Company Limited (the "Trustee") shall be used for (i) processing transfer of the accrued benefits to/from the Scheme; (ii) administration for claims of accrued benefits of the Scheme; (iii) conducting direct marketing activities of provident fund, investment, insurance or other related products and services of the Trustee or its associated companies; (iv) compliance with the applicable laws and regulations; and (v) any other purposes related to the above. The Claimant/Scheme Member further agrees that the information provided hereunder may be made available to other service providers of the Scheme, any agents or other associated companies of the Trustee which the Trustee considers appropriate.

The information which the Claimant/Scheme Member provides to the Trustee herein is on a voluntary basis. However, failure to supply information may result in the Trustee being unable to process this application.

The Claimant/Scheme Member has the right to obtain access to and to request correction of any of his or her personal information held by the Trustee. Request for such access can be made in writing and addressed to the **Manager, Pensions Administration Department, BestServe Financial Limited, 22/F, China Resources Building, 26 Harbour Road, Wanchai, Hong Kong.**

上述申索人/計劃成員特此承認，在本表格內向永明信託有限公司(“受託人”)提供的所有資料應被用於：(i) 本計劃累算權益轉入/轉出之辦理手續；(ii) 本計劃累算權益申索之行政事宜；(iii) 進行受託人或其相聯公司的公積金、投資、保險或其他相關產品和服務的直接市場推廣活動；(iv) 遵守適用法律和規例；及(v) 與上述有關的任何其他用途。申索人/計劃成員進一步同意，在本表格提供的資料可以提供給本計劃的其他服務提供者，以及受託人認為適當的任何代理人或受託人的其他相聯公司。

申索人/計劃成員是以自願性質向受託人提供本表格的資料的。但是，未能提供資料可能導致受託人不能處理本申請。

申索人/計劃成員有權查閱並且要求更正受託人所持有的申請人個人資料。如要求查閱，可通過書面方式提出，地址為香港灣仔港灣道 26 號華潤大廈 22 樓卓譽金融服務有限公司退休金管理部經理。

I, the Member, declare that to the best of my knowledge and belief, the information given in this Form / and its attachment * is correct and complete. ♦

本人(成員)聲明，本人深知確信本表格／及其附件 * 所提供的資料均屬正確及完整，無訛且並無缺漏。♦

(Please see procedures to be followed at Notes 6, 7 and 8 after completion of this Form)

(計劃成員填妥本表格後，請參閱註六、註七及註八以了解跟進程序。)

◆ Warning 警告：

Section 43E of the Mandatory Provident Fund Schemes Ordinance makes it an offence punishable with a maximum of 1-year imprisonment for the first occasion and 2-year imprisonment on each subsequent occasion for a person who makes a false or misleading statement in a material respect. 根據強制性公積金計劃條例第 43E 條，任何人士如在要項上作出虛假或具誤導性聲明，即屬違法。初犯者最高刑罰可判監禁一年；而再犯者則每次最高可監禁兩年。

*Delete whichever is inappropriate 請刪除不適用者

只供香港永明金融有限公司(於百慕達註冊成立)填寫 FOR OFFICE USE ONLY

強積金中介人 / 代理人資料 MPF Intermediary / Agent Details

姓名 Name: _____

編號 Code: _____

註冊編號 MPF Card Registration No.: _____

Signature of Member 成員簽署

Date 日期(dd 日/mm 月/yyyy 年) _____

資金轉移表格填報須知

- (1) 用詞定義：
- (a) 「供款帳戶」- 指強制性供款及／或自願性供款就現時受僱工作或現時自僱工作而支付入內的帳戶。
 - (b) 「保留帳戶」- 指就計劃成員的任何以往受僱工作或以往自僱工作而保存累算權益的帳戶。
 - (c) 「前任僱員」- 指剛被終止受僱的僱員。
 - (d) 「前任自僱人士」- 指剛終止自僱的人士。
 - (e) 「轉移受託人」- 指計劃的受託人，而該計劃的某成員的累算權益是按照該成員所作的選擇而轉移至另一註冊計劃或同一計劃的另一帳戶內。
 - (f) 「承轉受託人」- 指計劃的受託人，該計劃的某成員的累算權益是按照該成員的選擇而轉移至該計劃。
- (2) 計劃成員只應在沒有香港身份證的情況下才填報護照號碼。
- (3) 不同類別的帳戶持有人可作不同的轉移選擇。申請人可參考下文，以查證可作出的選擇：

供款帳戶

I. 屬前任僱員的供款帳戶持有人可作的轉移選擇

- (a) 就僱主營辦計劃內的供款帳戶而言，前任僱員可選擇把累算權益轉移至：
- (i) 他／她所指定的某集成信託計劃內的帳戶；或
 - (ii) 他／她在某行業計劃內的現有帳戶；或
 - (iii) (如前任僱員其後受僱於新僱主，則)新僱主就他／她而參與的計劃內的供款帳戶。不過，當累算權益轉移至此供款帳戶後，他／她在終止受僱於新僱主前，再不能將權益轉移。
- (b) 就集成信託計劃內的供款帳戶而言，前任僱員可選擇把累算權益轉移至：
- (i) 同一計劃內另一帳戶（即保留在現有計劃內）；或
 - (ii) 他／她所指定的另一集成信託計劃內的帳戶；或
 - (iii) 他／她在行業計劃內的現有帳戶；或
 - (iv) (如前任僱員其後受僱於新僱主，則)新僱主就他／她而參與的計劃內的供款帳戶。不過，當累算權益轉移至此供款帳戶後，他／她在終止受僱於新僱主前，再不能將權益轉移。
- (c) 就行業計劃內的供款帳戶而言，前任僱員可選擇把累算權益轉移至：
- (i) 他／她所指定的某集成信託計劃內的帳戶；或
 - (ii) 他／她在另一行業計劃內的現有帳戶；或
 - (iii) (如前任僱員其後受僱於新僱主，則)新僱主就他／她而參與的計劃內的供款帳戶。不過，當累算權益轉移至此供款帳戶後，他／她在終止受僱於新僱主前，再不能將權益轉移。

如前任僱員擬把累算權益保留在行業計劃內，便無須填報本轉移權益的表格。

II. 屬自僱人士或前任自僱人士供款帳戶持有人可作的轉移選擇

- (a) 就集成信託計劃內的供款帳戶而言，自僱人士或前任自僱人士可選擇把累算權益轉移至：
- (i) 他／她所指定的另一集成信託計劃內的帳戶；或
 - (ii) 他／她在某行業計劃內的現有帳戶；或
 - (iii) 他／她有資格加入的行業計劃內的帳戶；或
 - (iv) (如屬前任自僱人士並其後受僱於新僱主，則)新僱主就他／她而參與的計劃內的供款帳戶。不過，當累算權益轉移至此供款帳戶後，他／她在終止受僱於新僱主前，再不能將權益轉移。
- (b) 就行業計劃內的供款帳戶而言，自僱人士或前任自僱人士可選擇把累算權益轉移至：
- (i) 他／她所指定的集成信託計劃內的帳戶；或
 - (ii) 他／她在另一行業計劃內的現有帳戶；或
 - (iii) 他／她有資格加入的另一行業計劃內的帳戶；或
 - (iv) (如屬前任自僱人士並其後受僱於新僱主，則)新僱主就他／她而參與的計劃內的供款帳戶。不過，當累算權益轉移至此供款帳戶後，他／她在終止受僱於新僱主前，再不能將權益轉移。

保留帳戶

集成信託計劃或行業計劃的任何成員，如欲選擇將其在該計劃保留帳戶內持有的累算權益，轉移至他／她有資格加入的另一計劃內，可填妥本表格並交予有關承轉受託人。

- (4) 參與編號指管理局發給參與僱主的參與證明書上編號。
- (5) 如計劃成員因新加入計劃而未知悉新帳戶的號碼，可留空不填。
- (6) 計劃成員填妥本表格後，應把表格交回：
- (a) **轉移受託人**：適用於把權益保留在現行集成信託計劃的選擇。
 - (b) **新僱主**：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承轉受託人該選擇的書面通知。
 - (c) **承轉受託人**：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。
- (7) 在文件及資料全部收妥後，資金方會進行轉移。
- (8) 如供款未完全清繳，資金將不會轉移，直至未清繳的供款及供款附加費（如適用）已全部支付予永明信託有限公司或強制性公積金計劃管理局向永明信託有限公司發出資金轉移的同意書（以較前者為準）。

Explanatory Notes for the completion of Election Form

- (1) Definition of Terms:
 - (a) "Contribution account" - an account into which mandatory contributions and/or voluntary contributions are paid in respect of a current employment or current self-employment.
 - (b) "Preserved account" - an account in which accrued benefits in respect of any former employment or former self-employment of a scheme member are held.
 - (c) "Former employee" – an employee who has just ceased his/her employment.
 - (d) "Former self-employed person" – a person who has just ceased self-employment.
 - (e) "A transferor trustee" – the trustee of a scheme from which the accrued benefits of a member are to be transferred in accordance with the member's election, whether to another registered scheme or to another account within the same scheme.
 - (f) "A transferee trustee" – the trustee of a scheme to which the accrued benefits of a member are to be transferred in accordance with the member's election.
- (2) Scheme members should give their passport numbers ONLY when they do NOT possess HKID cards.
- (3) Different types of account holders have different transfer options. An applicant may check the list below to see the transfer options available to him/her:

Contribution Accounts

I. Transfer options for contribution account holder who is a Former Employee

- (a) For a contribution account in an employer sponsored scheme, the former employee may elect to transfer to :
 - (i) an account in a master trust scheme nominated by himself/herself; **or**
 - (ii) an existing account of the former employee in an industry scheme; **or**
 - (iii) (if the former employee is subsequently employed by a new employer,) the contribution account of the scheme in which the new employer is participating in relation to him/her. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with new employer.
- (b) For a contribution account in a master trust scheme, the former employee may elect to transfer to :
 - (i) another account in the same scheme (i.e. retained in the current scheme); **or**
 - (ii) an account in another master trust scheme nominated by himself/herself; **or**
 - (iii) an existing account of the former employee in an industry scheme; **or**
 - (iv) (if the former employee is subsequently employed by a new employer,) the contribution account of the scheme in which the new employer is participating in relation to him/her. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with new employer.
- (c) For a contribution account in an industry scheme, the former employee may elect to transfer to:
 - (i) an account in a master trust scheme nominated by himself/herself; **or**
 - (ii) an existing account of the former employee in another industry scheme; **or**
 - (iii) (if the former employee is subsequently employed by a new employer,) the contribution account of the scheme in which the new employer is participating in relation to him/her. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with new employer.

If the former employee wishes to retain his/her accrued benefits in the industry scheme, he/she does not need to fill in this Form for transfer.

II. Transfer options for a contribution account holder who is a Self-Employed Person or Former Self-Employed Person

- (a) For a contribution account in a master trust scheme, the self-employed person or former self-employed person may elect to transfer to:
 - (i) an account in another master trust scheme nominated by himself/herself; **or**
 - (ii) an existing account of the person in an industry scheme; **or**
 - (iii) an account in an industry scheme to which the person is eligible to belong; **or**
 - (iv) (if the person is a former self-employed person and is subsequently employed by a new employer,) the contribution account of the scheme in which the new employer is participating in relation to the person. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.
- (b) For a contribution account in an industry scheme, the self-employed person or former self-employed person may elect to transfer to:
 - (i) an account in a master trust scheme nominated by himself/herself; **or**
 - (ii) an existing account of the person in another industry scheme ; **or**
 - (iii) an account in another industry scheme to which the person is eligible to belong; **or**
 - (iv) (if the person is a former self-employed person and is subsequently employed by a new employer,) the contribution account of the scheme in which the new employer is participating in relation to the person. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.

Preserved Accounts

Any member of a master trust scheme or an industry scheme may elect to have the accrued benefits held in a preserved account of the member in the scheme transferred to another scheme to which the member is eligible to belong by giving this Form to the transferee trustee concerned.

- (4) The participation number is the number printed on the participation certificate issued by the MPFA to the participating employer.
- (5) Leave it blank if a member has newly joined the scheme and is not aware of the account number for his/her new account.
- (6) Upon completion of this Form, a scheme member should give this Form to :
 - (a) **Transferor trustee:** For election to have the benefits retained in the current master trust scheme.
 - (b) **New employer:** 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 transferee trustee concerned.
 - (c) **Transferee trustee:** For election to have the benefits transferred to another master trust scheme or industry scheme elected by the scheme member.
- (7) Transfer will be processed upon receipt of full evidence and information
- (8) If there are contributions outstanding, accrued benefits will not be transferred until all of the outstanding contributions and contribution surcharges, if any, have been paid to Sun Life Trustee Company Limited or the Mandatory Provident Fund Schemes Authority has given its written consent for Sun Life Trustee Company Limited to effect the transfer, whichever is earlier.