

# Sun Life MPF Master Trust (Formerly named SCHRODER MPF MASTER TRUST)

## 永明強積金集成信託計劃 (前計劃名稱為施羅德強積金集成信託計劃)

### Self-Employed Application Form 自僱人士申請表格

#### 1. SELF-EMPLOYED DETAILS 自僱人士資料

(a) Name of applicant 申請人姓名

Surname 姓 \_\_\_\_\_ Given  
name 名 \_\_\_\_\_ Chinese  
name (if applicable) \_\_\_\_\_  
中文姓名(如適用)

Hong Kong ID Card<sup>^</sup> 香港身份證<sup>^</sup> \_\_\_\_\_ ( ) Nationality 國籍 \_\_\_\_\_

Passport No.<sup>^</sup> 護照號碼<sup>^</sup> \_\_\_\_\_

Sex 性別:  Male 男  Female 女 Date of Birth<sup>Note 1&2</sup> 出生日期<sup>備註 1 及 2</sup> \_\_\_\_/\_\_\_\_/\_\_\_\_ yy 年

(b) Business Registration No.<sup>^</sup> (if applicable) 商業登記證號碼<sup>^</sup> (如適用) \_\_\_\_\_

(c) Nature of business 業務性質 \_\_\_\_\_

(d) Office Tel. No. 辦公室電話號碼 \_\_\_\_\_ Fax No. 傳真號碼 \_\_\_\_\_

Home Tel. No. 住宅電話號碼 \_\_\_\_\_ Mobile No. 流動電話號碼 \_\_\_\_\_

E-mail address 電子郵箱 \_\_\_\_\_

(e) Business / Residential address 營業地址 / 住址

\_\_\_\_\_  
\_\_\_\_\_

(f) Correspondence address (if different from business / residential address)<sup>Note 3</sup> 通訊地址<sup>備註 3</sup> (如與營業地址 / 住址不同)

\_\_\_\_\_  
\_\_\_\_\_

Chinese address (if applicable) 中文地址(如適用)

<sup>^</sup> Please attach a photocopy of member's HKID Card/passport **and/or** Business Registration Certificate (if applicable) for verification. If you cannot provide a photocopy of mentioned document(s), you can bring along the original copy of this/these document(s) with this form and submit to the scheme administrator – BestServe Financial Limited, in person. 請附上成員的香港身份證 / 護照副本 **及/或** 商業登記證副本 (如適用) 以便核對。如成員未能提供有關文件副本, 請攜同有關文件正本及本表格至計劃行政管理人—卓譽金融服務有限公司親身遞交。



## Note 備註

1. If your HKID Card only contains the year of birth and you have no other form of identification to prove your exact date of birth (e.g. Birth Certificate or Passport), we shall adopt 31 December as the day and month of your birthday. Likewise, if your HKID Card contains only year and month but not the date of birth, we shall adopt the last day of the month as your birthday. If you leave the day and/or month blank, we shall follow the above rules to adopt your date of birth as the last day of that month or 31 December. 如閣下的香港身份證上只有出生年份，而沒有其他證件證明閣下的實際出生日期(例如出生證明書或護照)，我們將以該年之 12 月 31 日作為閣下的出生日期。同樣，如閣下的香港身份證上只有出生年份和月份而沒有註明有關日子，我們將以有關月份的最後一天作為閣下的出生日期。請注意，若閣下沒有填寫日子及/或月份，閣下的出生日期亦同樣依據以上規定，即定為該月的最後一天或 12 月 31 日。
2. If your investment instructions is Default Investment Strategy ("DIS") either set by default or by choice, we shall perform annual de-risking of your benefits invested in DIS based on the birth date provided to automatically adjust the holdings in the Schroder MPF Core Accumulation Fund and the Schroder MPF Age 65 Plus Fund (collectively the "DIS Funds"). If you subsequently provide us with an updated date of birth, the Trustee will adjust the holdings between the 2 DIS Funds according to your updated birthday immediately and perform de-risking in the future based on this updated birthday. If the Trustee does not have the full date of birth of the relevant member, the de-risking will be carried out as follows: (i) If only the year and month of birth is available, the annual de-risking will take place on the last calendar day of the birth month, or if it is not a dealing day, the next available dealing day. (ii) If only the year of birth is available, the annual de-risking will take place on the last calendar day of the year, or if it is not a dealing day, the next available dealing day. (iii) If no information at all on the date of birth, member's accrued benefits will be fully invested in Schroder MPF Age 65 Plus Fund with no de-risking applied. **Therefore, you should provide date of birth same as your HKID/Passport or annual de-risking may not be performed correctly.** Please kindly be alerted that investment gain/loss may be incurred from the process. 不論為預設或按閣下的投資指示，如閣下的投資指示為預設投資策略，我們將依據在此填報的出生日期，每年於閣下生日當天進行自動調整施羅德強積金核心累積基金及施羅德強積金 65 歲後基金(統稱「預設投資策略基金」)之間的資產配置以進行降低風險安排。若閣下隨後更新閣下的出生日期，受託人將依據新的出生日期，採用相應的配置百分比儘快進行投資轉換，及其後按此出生日期，實行降低風險安排。若受託人並不獲悉有關成員的完整出生日期，則降低風險將進行如下：(i)若只獲悉出生年份和月份，每年降低風險安排將會採用出生月份的最後曆日，或倘若該最後曆日並非交易日，則採用下一個交易日。(ii)若只獲悉出生年份，每年降低風險安排將採用每年的最後曆日，或倘若該最後曆日並非交易日，則採用下一個交易日。(iii)若完全無法獲悉出生日期資料，成員的累積權益將會全部投資於施羅德強積金 65 歲後基金，而不會進行降低風險安排。因此，閣下需要提供與身份證/護照相同的出生日期。否則，每年降低風險安排可能未必正確執行。請注意在進行此程序中可能衍生投資利益或損失。
3. If the correspondence address is a PO Box, you must fill in the residential address. 如通訊地址為郵政信箱，閣下必須填寫住址。

## 2. SCHEME DETAILS 計劃詳情

- (a) Scheme Commencement Date 計劃開始日期       dd 日  mm 月  yyyy 年
- (b) Frequency of Contribution 付款方式：

- Yearly [contribution period will be each financial year from October 01 to September 30] & [Contribution day] will be the last day of day of each financial year] 每年[供款期將為每一財政年度的10月1日至9月30日，而「供款日」為每一財政年度之最後一天]
- Monthly [contribution period will be each calendar month] & [Contribution day] will be the last day of each calendar month] 每月[供款期將為每一曆月，而「供款日」為每一曆月之最後一天]

## 3. INVESTMENT OF CONTRIBUTION DETAILS 供款投資詳情

**Please choose ONE only 請只選其中一項** Please check (✓) the appropriate box. 請在適當方格加上剔號 (✓)。

就本人及參與僱主作出的強制性供款和自願性供款(如有)，包括由其他計劃轉入的款項，本人作出的投資選擇如下<sup>Note 4</sup>：

My investment choice in respect of the mandatory and voluntary contribution (if any) made by me and the Participating Employer, including transferred-in monies from other schemes, is specified as follows<sup>Note 4</sup>：

### Option 1 - Default Investment Strategy ("DIS") 選擇1 - 預設投資策略

「DIS is a default investment arrangement as stipulated in accordance with the Mandatory Provident Fund Schemes Ordinance. The DIS is not a fund - it is a strategy that uses two constituent funds, namely the Schroder MPF Core Accumulation Fund and the Schroder MPF Age 65 Plus Fund (collectively the "DIS Funds") to automatically reduce the risk exposure as the member approaches retirement age. The DIS Funds will invest in a globally diversified manner and invest in different assets (e.g. equities, bonds, money market instruments, etc.). The DIS Funds are subject to fee and expense caps imposed by the legislation. For details of DIS, please refer to the Offering Document of the Scheme.

「預設投資策略」是一項根據《強制性公積金計劃條例》規定的預設投資安排。「預設投資策略」並非一項基金，而是一項運用兩項成分基金，即施羅德強積金核心累積基金和施羅德強積金65歲後投資基金(統稱「預設投資策略基金」)的策略；隨著成員步向退休年齡而自動降低成員的風險。「預設投資策略基金」將以全球多元化方式進行投資，並投資於不同的資產(例如股票、債券、貨幣市場工具等)。預設投資策略基金受制於法例規定其收費及開支上限。有關「預設投資策略」的詳情，請參閱本計劃的主要銷售文件。

I understand my future monies (including contributions and transfer-in monies) will be invested to DIS which will be invested in accordance with the pre-determined fund choices mentioned in Table A based on my age. The investment mandate for future monies will be changed automatically and existing balance will be automatically switched on my birthday or the next business day after my birthday (if the birthday on a non-business day) (except the following situations).

When one or more of the specified instructions (including but not limited to subscription including any transfer-in instructions, redemption including any withdrawal instructions, instructions for refund or payment of any statutory long service / severance pay, transfer-out instructions, change of investment mandate or switching instructions) are being processed on the annual date of de-risking for a relevant member, the annual de-risking will be deferred and will only take place on the next dealing day after completion of these instructions where necessary.

本人明白本人的未來供款(包括供款及轉入款額)將會投資於預設投資策略並根據本人的年齡按列表 A 來釐定帳戶中的基金分佈進行投資。未來供款的投資授權及現有結餘的投資組合亦會於本人生日當天或生日後首個交易日(如生日當天為非交易日)(下列情況除外)根據預設的基金分佈自動更改或轉換。

當一個或多個特定的指示(包括認購任何轉入指示、贖回任何提取指示、退款指示或支付任何法定長期服務金/遣散費、轉移指示、更改投資委託書或轉換指示)，在相關成員每年降低風險之日正在辦理，每年降低風險程序則將被推遲，只有在完成該等指示後於下一個交易日才能進行。

(Please skip Option 2 – Fund Cruiser & Option 3 – Own Investment Choice if you selected this option. 如選擇此項，請略過選擇 2 - 基金自動導航系統及選擇 3 - 自選基金組合。)

## Option 2 - Fund Cruiser 選擇 2 - 基金自動導航系統

Both future contributions (including transfer-in monies) and accumulated balances will be invested in accordance with the Fund Cruiser based on your age and automatically switched when you reach the next age band. For details, please refer to the Offering Document for Sun Life MPF Master Trust.

閣下的未來供款(包括轉入款項)及累積資產將按照閣下的年齡，根據基金自動導航系統而作出投資，其後亦會隨閣下的年齡遞增而自動更改資產分配和作出資產轉換。詳情請參閱永明強積金集成信託計劃銷售文件。

(Please skip Option 3 – Own Investment Choice if you selected this option. 如選擇此項，請略過選擇 3-自選基金組合。)

## Option 3 - Own Investment Choice <sup>Note 4</sup> 選擇 3 - 自選基金組合 <sup>Note 4</sup>

You may make up your own choices as follows 可按照 閣下之意願作分配如下：

Name of Funds 基金名稱	Mandatory Contributions 強制性供款	Voluntary Contributions <sup>#</sup> 自願性供款 <sup>#</sup>
Schroder MPF Capital Guaranteed Portfolio 施羅德強積金本金保證投資組合	_ _ _  %	_ _ _  %
Schroder MPF Conservative Portfolio 施羅德強積金保守投資組合	_ _ _  %	_ _ _  %
Schroder MPF RMB and HKD Fixed Income Portfolio 施羅德強積金人民幣及港元定息投資組合	_ _ _  %	_ _ _  %
Schroder MPF Global Fixed Income Portfolio 施羅德強積金環球定息投資組合	_ _ _  %	_ _ _  %
Schroder MPF Age 65 Plus Fund ^ 施羅德強積金 65 歲後投資基金^	_ _ _  %	_ _ _  %
Schroder MPF Capital Stable Portfolio 施羅德強積金資本平穩投資組合	_ _ _  %	_ _ _  %
Schroder MPF Stable Growth Portfolio 施羅德強積金平穩增長投資組合	_ _ _  %	_ _ _  %
Schroder MPF Balanced Investment Portfolio 施羅德強積金均衡投資組合	_ _ _  %	_ _ _  %
Schroder MPF Core Accumulation Fund ^ 施羅德強積金核心累積投資基金^	_ _ _  %	_ _ _  %
Schroder MPF Growth Portfolio 施羅德強積金增長投資組合	_ _ _  %	_ _ _  %
Schroder MPF International Portfolio 施羅德強積金國際投資組合	_ _ _  %	_ _ _  %
Schroder MPF Asian Portfolio 施羅德強積金亞洲投資組合	_ _ _  %	_ _ _  %
Schroder MPF Hong Kong Portfolio 施羅德強積金香港投資組合	_ _ _  %	_ _ _  %
<b>Total 合共</b>	<b>100%</b>	<b>100%</b>

Investment Allocation % (Complete in multiples of 10%) 投資分配(請以10%或其倍數填寫)

# Complete only if you are going to make Voluntary Contributions. 只供參與「自願性供款」時填寫。

^ Benefits invested in this investment will not be subject to the de-risking process. 投資於此基金之權益將不會遵從降低風險安排。

### Note 備註

4. In the event of (i) invalid, unclear or incomplete instructions including amendments which are not properly signed; or (ii) no instruction is being provided above; or (iii) absence of employee's signature in Declaration Section, the relevant mandatory contributions and/or voluntary contributions will be wholly (100%) invested in Default Investment Strategy, until the completion of processing any further instruction(s) of investment choice received by Trustee. 如(i)所註明的供款分配率指示不符合規定、不清晰、不完整，包括於刪改處沒有簽署作實；或(ii)沒有註明任何供款分配率指示；或(iii)僱員未有於聲明部份簽署，相關強制性及/或自願性供款將會全數(100%)投資於預設投資策略，直至受託人收到並完成處理閣下的進一步投資選擇指示。

### Table A – DIS De-risking Table 列表 A - 預設投資策略降低風險列表

#### Annual de-risking 每年降低風險

Accrued benefits invested through the DIS will be invested in a way that adjusts risk depending on a member's age. 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. 透過「預設投資策略」投資的累積權益將以因應成員年齡來調整風險的方式投資。「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。

Such de-risking is to be achieved by way of reducing the holding in the Schroder MPF Core Accumulation Fund ("CAF") and increasing the holding in the Schroder MPF Age 65 Plus Fund ("A65F") over time. The asset allocation stays the same up until 50 years of age, then reduces steadily until age 64, after which it stays steady again. 策略乃透過隨著時間逐步減持施羅德強積金核心累積基金及增持施羅德強積金 65 歲後基金，以達致降低風險的目標。50 歲前的資產配置會維持不變，之後逐步降低，直至 64 歲為止，之後便維持穩定。

In summary, under the DIS: 總括而言，根據「預設投資策略」：

- (1) When a member is below the age of 50, all accrued benefits, future contributions and transfer-in monies will be invested in the CAF. 當成員未滿 50 歲，所有累積權益、未來供款及轉入款項將會投資於施羅德強積金核心累積基金。
- (2) When a member is between the ages of 50 and 64, all accrued benefits, future contributions and transfer-in monies will be invested according to the allocation percentages between the CAF and A65F as shown in the table below. The de-risking of existing accrued benefits future contributions and transfer-in monies will be automatically carried out as described above. 當成員年齡介乎 50 至 64 歲，所有累積權益、未來供款及轉入款項將會按照下圖的預設投資策略降低風險列表中施羅德強積金核心累積基金與施羅德強積金 65 歲後基金之間的配置百分比進行投資。現有累積權益、未來供款及轉入款項將會自動按上文所述執行降低風險安排。
- (3) When a member reaches the age of 64, all accrued benefits, future contributions and transfer-in monies will be invested in the A65F. 當成員年屆 64 歲，所有累積權益、未來供款及轉入款項將會投資於施羅德強積金 65 歲後基金。

Age 年齡	Schroder MPF Core Accumulation Fund (CAF) 施羅德強積金核心累積基金	Schroder MPF Age 65 Plus Portfolio (A65F) 施羅德強積金 65 歲後基金
Below 50 50 以下	100.0%	0.0%
50	93.3%	6.7%
51	86.7%	13.3%
52	80.0%	20.0%
53	73.3%	26.7%
54	66.7%	33.3%
55	60.0%	40.0%
56	53.3%	46.7%
57	46.7%	53.3%
58	40.0%	60.0%
59	33.3%	66.7%
60	26.7%	73.3%
61	20.0%	80.0%
62	13.3%	86.7%
63	6.7%	93.3%
64 and above 64 及以上	0.0%	100.0%

Note: The above allocation between the CAF and A65F is made at the point of annual de-risking and the proportion of the CAF and A65F in the DIS portfolio may vary during the year due to market fluctuations.

附註：上表列明在每年降低風險一刻時所採用於施羅德強積金核心累積基金與施羅德強積金 65 歲後基金之間的配置，一年當中預設投資策略組合內施羅德強積金核心累積基金與施羅德強積金 65 歲後基金的比例或會因為市場波動而有所不同。

## 4. AGREEMENT BETWEEN THE SELF-EMPLOYED PERSON AND THE TRUSTEE 自僱人士與受託人的協議

- (a) In consideration of the agreements given by the Self-Employed Person in this Application Form, the Trustee agrees that the Self-Employed Person shall become a Self-Employed Member for the purposes of the Scheme with effect from the date on which the later of the Self-Employed Person and the Trustee signs this Application Form.
- 因應自僱人士在此申請表所同意的事項，受託人同意由本計劃的自僱人士與受託人簽署此申請表當日起，自僱人士將成為本計劃所指參加本計劃的自僱人士。
- (b) The Self-Employed Person agrees 自僱人士同意：
- (i) to be bound by, and covenants to comply with, the provisions of the trust deed (the“Deed”) establishing the Scheme, the rules governing the Scheme (the“Rules”) and the provisions of this Application Form, in each case as from time to time in force; and  
受約束於及承諾遵守為成立本計劃而簽訂的信託契據（“契據”）的條文、管限本計劃的規則（“規則”）及此申請表的條文，以及此等不時生效的條文和規則；及
- (ii) to perform any act or pay any sum required by law to be done or paid by it as a Self-Employed for the purposes of the Scheme insofar as attributable to the Self-Employed.  
履行或繳付任何按照法例作為本計劃的自僱人士須履行的事項或繳付的款項。
- (c) The Self-Employed Person agrees to pay to the Scheme the full amount of the Member’s Mandatory Contributions.  
自僱人士同意向本計劃全數繳付其應繳付的成員強制性供款。
- (d) All payments of Contributions to the Scheme shall be paid to the Trustee in accordance with the Mandatory Provident Fund Schemes Ordinance and Mandatory Provident Fund Scheme (General) Regulations. 須根據強制性公積金計劃條例及強制性公積金計劃（一般）規例供款予受託人。
- (e) Unless the context otherwise requires, words and expressions defined in the Deed or, as the case may be, the Rules have the same meanings in this Application Form. 除文意另有所指外，否則此申請表格中的字眼及辭句與契據或規則中（視屬何情況而定）所界定的字眼及辭句具有相同的意義。
- (f) This Application Form is governed by and shall be construed in accordance with Hong Kong laws.  
此申請表格受香港法例所管限，並應以香港法例詮釋。
- (g) The Self-Employed Person bears sole responsibility to notify the Trustee of any change of personal details within 30 days of such changes becoming effective (ref: Mandatory Provident Fund Schemes (General) Regulation). 自僱人士個人資料如有任何改變，自僱人士須自行負責於改變生效後30天內通知受託人（參照：強制性公積金計劃（一般）規例）。



Accepted and agreed 接受及同意：

By the Applicant

and company chop (if applicable)

申請人及公司蓋印(如適用)

Authorised Signature

認可簽署

Date 日期

By HSBC Provident Fund

Trustee (Hong Kong) Limited

Authorised Signature

認可簽署

Date 日期

## 5. DECLARATION 聲明

I have read the Personal information collection statement and understand my rights under the Personal Data Privacy Ordinance.

本人已細閱收集個人資料聲明，並明白個人資料(私隱)條例賦予本人的權利。

I hereby declare and agree that all the information given above is complete, true and accurate, and is given to the best of my knowledge.

本人謹此聲明並同意上述所有資料均是完整，真實及準確，並且是盡本人所知而作答。

Self-Employed Person's Signature 自僱人士簽署

Date 日期

### Personal information collection statement 收集個人資料聲明

- The personal data provided by Employers, Employees, Self-Employed Persons and/or Personal Account Holders and details of transactions or dealings by such Employers, Employees, Self-Employed Persons and/or Personal Account Holders from time to time may be used for one or more of the following purposes:- (i) the administration, communication and/or management of or in connection with the contributions or accrued benefits or MPF account in respect of the Employers, Employees, Self-Employed Persons and/or Personal Account Holders under the MPF scheme; (ii) improving and furthering the provision of MPF products and/or MPF services by Sun Life Hong Kong Limited, HSBC Provident Fund Trustee (Hong Kong) Limited (including any entity of HSBC Group providing services to the Trustee) and BestServe Financial Limited, subject to applicable MPF legislation; (iii) matching for MPF related purpose with other personal data concerning the relevant Employers, Employees, Self-Employed Persons and/or Personal Account Holders; (iv) compliance or in accordance with an order of a court or compliance or in accordance with applicable laws or a requirement made under a law. 不時由僱主、僱員、自僱人士及/或個人帳戶成員所提供的個人資料及該等僱主、僱員、自僱人士及/或個人帳戶成員的交易或事務往來的詳情將可被用於以下一項或多項用途：(i) 強積金計劃下與僱主、僱員、自僱人士及/或個人帳戶成員的供款或累算權益或強積金戶口有關的行政事宜及/或管理；(ii) 在適用的強積金法例規限下，改善及進一步提供由香港永明金融有限公司、HSBC Provident Fund Trustee (Hong Kong) Limited(包括滙豐集團內向託管人提供服務的服務供應商)，卓譽金融服務有限公司，所提供的強積金產品及/或強積金服務；(iii) 為任何強積金相關的用途而核對相關僱主、僱員、自僱人士及/或個人帳戶成員的其他個人資料；(iv) 遵守 或按照法庭命令或遵守或按照法律或根據法律訂立的規定。
- Failure to provide your information may result in us being unable to process your application or perform the services you request. 如您未能提供資料將可能導致我們未能處理您的申請或提供您所要求的服務。
- Personal data held by us relating to an Employers, Employees, Self-Employed Persons and/or Personal Account Holders will be kept confidential but such information may be provided by us or any of our service providers to the following parties for the purposes set out in paragraph 1:- (i) any regulators or government authorities in any jurisdiction; (ii) any service provider, agent or contractor who provides administrative, telecommunications, computer, payment, data processing, matching, storage or other services in connection with the operation of our MPF business; (iii) relevant Employers; (iv) Sun Life Hong Kong Limited, HSBC Provident Fund Trustee (Hong Kong) Limited (including any entity of HSBC Group providing services to the Trustee) and BestServe Financial Limited. Such information may be transferred to a place outside Hong Kong Special Administrative Region. 由我們持有僱主、僱員、自僱人士及/或個人帳戶成員的個人資料將予保密，但我們或任何我們的服務供應商可能會將該等資料提供給以下各方作第1段所述的用途：(i)任何司法管轄區的監管機構或政府機關；(ii)任何提供與營運我們的強積金業務有關的行政、電訊、電腦、付賬、數據處理、核對、儲存、或其他服務的任何服務供應商、代理人或承包商；(iii)相關的僱主；(iv)香港永明金融有限公司，HSBC Provident Fund Trustee (Hong Kong) Limited(包括滙豐集團內向託管人提供服務的服務供應商)，卓譽金融服務有限公司。該等資料可能轉移至香港特別行政區以外的地方。
- You have the right to request access to and correction or request for not using information for direct marketing purpose of your personal data held by us. Request should be addressed to: The Data Protection Officer, Sun Life MPF Master Trust, The Administrator, BestServe Financial Limited, 10/F, One Harbourfront, 18 Tak Fung Street, Hung Hom, Kowloon, Hong Kong. 您有權要求查閱及更改由我們持有您的個人資料。如有需要，可致函永明強積金集成信託計劃行政管理人—卓譽金融服務有限公司，香港九龍紅磡德輔街18號海濱廣場一座十樓，向資料保障主任提出要求。
- In accordance with the terms of the Personal Data (Privacy) Ordinance, the Trustee has the right to charge a reasonable fee for the processing of any data access request. 根據個人資料(私隱)條例的條款，受託人有權就處理任何翻查資料要求收取一項合理費用。

## CHECKLIST FOR SUPPORTING DOCUMENTS 須一併繳交之有關文件檢閱清單：

- HKID Copy 香港居民身份證副本
- Copy of the Latest Tax Statement (If applicable) 閣下最近期之稅單副本(如適用者)
- Copy of Business Registration Certificate (If applicable) 貴公司之商業登記證副本(如適用者)
- Copy of board resolution (with signature specimen) or Copy of board minutes (with the name of Authorized signor) or Copy of documents to prove his/her ownership of the company/control over the management of the company and Authorized signer HKID Copy. 董事會決議的副本(連同簽名樣本)或董事會會議記錄的複印件(連同授權 閣下的名字)或文件證明他/她擁有該公司的管理/控制權的並授權簽署人的身份證副本。

## THIS FORM SHOULD BE SENT TO 此表格應交往：

The Administrator of the Sun Life MPF Master Trust  
10/F, One Harbourfront, 18 Tak Fung Street, Hunghom,  
Kowloon, Hong Kong 永明強積金集成信託計劃行政管理人  
香港九龍紅磡德豐街18號海濱廣場一座十樓 Administrator  
Hotline 行政管理人熱線：

**2971 0200**

### OFFICE USE ONLY 請毋須填寫此部份

Account No. | |\_|\_|\_|\_|\_|\_|\_|\_|\_|\_|

Class of Units: B

Payment Received:

Date:

Attached Documents:

ID/Passport ✓/ x

BR Cert. ✓/ x

Checked By: MO Code | |\_|\_|\_|\_|\_|

Initial & Date:

CS Code | |\_|\_|\_|\_|\_|

Initial & Date:

CO Code | |\_|\_|\_|\_|\_|

Initial & Date:

## Sun Life MPF Master Trust

### 永明強積金集成信託計劃

#### Attachment to Self-Employed Application Form

自僱人士申請表格附件

Dear self-employed person 親愛的自僱人士：

As required by the Mandatory Provident Fund Authority, please indicate your industry type by choosing one of the below 跟據強積金管理局的要求，請選擇下列其中一項作為你的行業類別：

- Catering 飲食
- Construction 建造
- Manufacturing 製造
- Financing 金融／Insurance 保險／Real Estate 地產／Business Services 商用服務\*
- Community 社區／Social 社會／Personal Services 個人服務\*
- Wholesale 批發／Retail 零售／Import and Export Trades 進出口貿易\*
- Transport 運輸
- Cleaning 清潔
- Security Guard 保安
- Hairdressing and Beauty 理髮及美容
- Others 其他
- Unknown 不詳

\*Please delete whichever is inappropriate 請刪除不適用者

Please return this attachment together with the completed application form and other relevant documents to 請將此附件連同已填妥的申請表格及其他有關文件交回：

**The Administrator of the Sun Life MPF Master Trust, BestServe Financial Limited  
10/F, One Harbourfront, 18 Tak Fung Street, Hung Hom, Kowloon, Hong Kong**

永明強積金集成信託計劃行政管理人－卓譽金融服務有限公司  
香港九龍紅磡德豐街18號海濱廣場一座十樓

**IMPORTANT MESSAGE (Please read before signing the application form)** 重要事項(請於填寫表格前先閱讀下列重要資料)

**NOTE** 備註:

1. For any future changes to the above information, please complete a Change in Asset Allocation Form which can be obtained from the Employer. 如要更改以上資料，請向僱主索取資產分配更改表格填寫。
2. If your investment choice is not specified above, your contributions (including transfer-in monies) will be invested in accordance with the Default Investment Strategy until a duly completed Change in Asset Allocation Form for changing your investment choice is effected. For details regarding the Default Investment Strategy, please refer to the **Offering Document** for Sun Life MPF Master Trust. 如閣下並未於上方提供投資選擇，閣下的供款（包括轉入款項）將按照預設投資策略而作出投資，直至閣下於資產分配更改表格上作出更改投資選擇指示生效後為止。詳情請參閱永明強積金集成信託計劃銷售文件。
3. In the event of (i) invalid, unclear or incomplete instructions including amendments which are not properly signed; or (ii) no instruction is being provided above; or (iii) absence of employee's signature in Declaration Section, the relevant mandatory contributions and/or voluntary contributions will be wholly (100%) invested in Default Investment Strategy, until the completion of processing any further instruction(s) of investment choice received by Trustee. 如(i) 所註明的供款分配率指示不符合規定、不清晰、不完整，包括於刪改處沒有簽署作實；或(ii) 沒有註明任何供款分配率指示；或(iii) 僱員未有於聲明部份簽署，相關強制性及／或自願性供款將會全數(100%)投資於預設投資策略，直至受託人收到並完成處理閣下的進一步投資選擇指示。