

填寫此表格前，請先細讀填報須知及計劃成員轉移權益須知。  
Please read the **Explanatory Notes** and **Notes to Transfer Benefits by Scheme Member** carefully before completing this Form.



## 永明彩虹強積金計劃 — 計劃成員資金轉移申請表 [第 MPF(S)-P(M)號表格]

### SUN LIFE RAINBOW MPF SCHEME –

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

(適用於自僱人士、個人帳戶持有人或終止受僱的僱員)

(For self-employed person, personal account holder or employee ceasing employment)

(強制性公積金計劃(一般)規例)(簡稱《規例》)第 145、146、147、148 及 149 條

Sections 145, 146, 147, 148 and 149 of the Mandatory Provident Fund Schemes (General) Regulation ("the Regulation")

# SAMPLE 樣本

- (a) 請以正楷填寫本表格。Please use BLOCK LETTERS to complete this Form.
- (b) 在本表格提供的個人資料，將被用作處理您在本表格內要求的轉移選擇。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.
- (c) 您就此項轉移申請提供的個人資料，將用作處理您的轉移申請。您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」)。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").
- (d) 請就本表格以外之要求，分別向原/新受託人另行提交通知。Please submit another notice to original/new trustee for any request(s) other than the purpose of this Form separately.

## 第一部 Section I 計劃成員資料 DETAILS OF SCHEME MEMBER

- (1) 姓(英文 English) Surname LEE 名 Given Name MEI LAI 稱謂 先生/女士/小姐/其他\* MS  
(須與香港身分證<sup>註1</sup> / 護照上相同 same as that shown on your Hong Kong Identity Card<sup>Note1</sup> / Passport) \*請刪除不適用者 \*Please delete as appropriate
- 姓(中文 Chinese) Surname 李 名 Given Name 美麗  
(須與香港身分證<sup>註1</sup> / 護照上相同 same as that shown on your Hong Kong Identity Card<sup>Note1</sup> / Passport)
- (2) 香港身分證號碼 HKID Card No. A111222(3)  
護照號碼\*\* Passport No. \*\*  
\*\* (護照號碼僅供沒有香港身分證的成員填寫) (Passport No. is applicable ONLY for member without HKID Card)
- (3) 聯絡資料 Contact details  
住宅電話號碼 Home Tel. No. 2345 6789 手提電話號碼 Mobile Phone No. 9876 5432  
電郵地址 Email Address leemeilai@email.com
- (4) 通訊地址 Correspondence Address  
(如非更改通訊地址，此部份無須填寫。You are NOT required to fill in this part unless you intend to update your correspondence address)  
8/F Happy Tower, 8 Lucky Road, Tsim Sha Tsui, Kowloon

以上之通訊地址將更新至閣下於永明彩虹強積金計劃之所有成員帳戶。如以上通訊地址只適用於第三部8(a)或8(b)列明的成員帳戶，請於方格內填上✓號。  
The above correspondence address will be updated for **ALL** your existing member accounts in Sun Life Rainbow MPF Scheme. Please ✓ the box if it will be applied to the member account stated in 8(a) or 8(b) under Section III only.

## 第二部 Section II 資金轉移資料 FUND TRANSFER INFORMATION

- (5) 原計劃的強積金帳戶資料：MPF account information in the original scheme：
- 原受託人名稱<sup>註2</sup> Name of original trustee<sup>Note 2</sup>：  
 永明信託有限公司 Sun Life Trustee Company Limited
- 原計劃名稱<sup>註2</sup> Name of original scheme<sup>Note 2</sup>：  
 永明彩虹強積金計劃 Sun Life Rainbow MPF Scheme
- 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✓)  
 個人帳戶 Personal account  或 OR
- 計劃成員帳戶號碼<sup>註2</sup> Scheme member's account number<sup>Note 2</sup>：
- 請參閱閣下最近期的成員權益報表或成員證書，以便填寫轉移資料。  
Please refer to the latest Member Statement or Member Certificate of your account from which the member's contribution is transferred.  
若閣下有多於一個前強積金計劃需要轉移，請另外填寫計劃成員資金轉移表格。  
Please submit other Scheme Member's Request for Fund Transfer Form(s) if you have more than one previous MPF Scheme(s) to transfer.**
- (6) 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)：Details of former employment (applicable for employee who wishes to transfer-out the accrued benefits from a contribution account after cessation of employment)：
- 前任僱主名稱 Name of former employer：  
**適用於由前僱主供款帳戶轉移之資產。Applicable for fund transferred from contribution account of former employment.**
- 僱主識別號碼<sup>註3</sup> Employer's identification number<sup>Note 3</sup>：
- (7) 自僱人士身份詳情(只適用於自僱人士)：Details of self-employed status (applicable for self-employed person only)：
- 請說明您轉移的原因，並於適當方格內填上✓號：Please indicate your reason of transfer and ✓ as appropriate：
- 終止自僱，生效日期是 Cessation of self-employment, with effect from: [ ] [ ] [ ] [ ] [ ] [ ] (日/月/年 DD/MM/YYYY)
- 本人將會維持自僱，並把本人的累算權益轉移至第三部第(8)項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：  
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: [ ] [ ] [ ] [ ] [ ] [ ] (日/月/年 DD/MM/YYYY)



### 第三部 Section III 轉移資金的選擇 FUND TRANSFER OPTIONS

(8) 新計劃的強積金帳戶資料：MPF account information in the new scheme:

本人選擇把以上第二部第(5)項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 (請選擇(a), (b)或(c), 並於適當方格內填上✓號) :  
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) :

(a) 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: To my contribution account with my new employer. Details of the account are :

新受託人名稱 <sup>註4</sup> Name of new trustee <sup>Note 4</sup>	<input type="checkbox"/> 永明信託有限公司 Sun Life Trustee Company Limited <input type="checkbox"/> 其他, 請註明 Others, please specify:
新計劃名稱 <sup>註4</sup> Name of new scheme <sup>Note 4</sup>	<input type="checkbox"/> 永明彩虹強積金計劃 Sun Life Rainbow MPF Scheme <input type="checkbox"/> 其他, 請註明 Others, please specify:
計劃成員帳戶號碼 <sup>註4</sup> Scheme member's account number <sup>Note 4</sup>	
新僱主名稱 Name of new employer	
僱主識別號碼 <sup>註3</sup> Employer's identification number <sup>Note 3</sup>	

(b) 轉移至本人新計劃內的指定帳戶, 資料如下: To my designated account in the new scheme. Details of the account are :

新受託人名稱 <sup>註4</sup> Name of new trustee <sup>Note 4</sup>	
新計劃名稱 <sup>註4</sup> Name of new scheme <sup>Note 4</sup>	
計劃成員帳戶號碼 <sup>註4</sup> Scheme member's account number <sup>Note 4</sup>	

請選擇其中一項轉移資金的選擇:

- a) 新僱主的供款帳戶 → (8)(a)  
b) 個人帳戶或自僱人士帳戶 → (8)(b)  
c) 保留現有計劃 (不適用於由其他受託人轉移至永明彩虹強積金計劃) → (8)(c)

Please choose ONE of Fund Transfer Options:

- a) Contribution Account of NEW employer → (8)(a)  
b) Personal Account or Self-employed Personal Account → (8)(b)  
c) Retained in Original MPF Scheme (NOT applicable for fund transferred from other trustee to Sun Life Rainbow MPF Scheme.) → (8)(c)

(c) 以個人帳戶形式保留在原計劃 (如適用)。Retained in the original scheme as personal account (where applicable).

(9) 有關本人在第二部第(5)項所述帳戶內的自願性供款<sup>註5</sup> (如有) 的安排。Arrangement of my voluntary contributions<sup>Note 5</sup> (if any) in my account stated in Section II (5). 請選擇(a)或(b), 並於適當方格內填上 ✓ 號: Please select option (a) OR (b) and ✓ as appropriate:

(備註: 如您沒有作出任何選擇, 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三部第(8)項的權益的同樣方式處理。如您已在第三部第(9)項作出選擇, 而帳戶內並沒有該等權益, 則有關選擇將不會獲處理。) (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.)

(a) 與在第三部第(8)項所述由強制性供款所產生的累算權益一併轉移。Transferred together with the accrued benefits derived from the mandatory contributions as in Section III (8).

(b) 按照原計劃的管限規則提取權益。Withdrawn in accordance with the governing rules of the original scheme.

付款方式 (請在適當方格內填上✓號): Method of payment (please ✓ as appropriate):

- (i) 支票付款 By cheque  
 (ii) 直接存入只以計劃成員名義開立的銀行帳戶 (不適用會因此而收取費用。詳情請向原受託人查詢。) By direct deposit to the name of a third party is not applicable. (This does not apply to charges involved. Please check with the original trustee.)

銀行名稱 Name of bank

銀行帳戶持有人姓名 Name of bank account holder

銀行帳戶號碼 Bank account number

如原強積金計劃有自願性供款, 請選擇處理方法。  
如選擇提取自願性供款, 請選擇付款方式。  
If you have voluntary contribution in original MPF scheme, please choose the handling arrangement.  
If you want to withdraw voluntary contribution, please choose method of payment.

### 第四部 Section IV 終止沒有剩餘款項的強積金帳戶 (如適用) TERMINATION OF MPF ACCOUNT WITH NO RESIDUAL BALANCE (IF APPLICABLE)

(10) 本人謹此指示原受託人在把本人於第二部第(5)項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。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.

## 第五部 Section V 授權及聲明 AUTHORIZATION AND DECLARATION

(11) 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。

I hereby give consent to the new trustee and MPFA to disclose information supplied by me in support of this election of transfer to the approved trustee(s) concerned and the relevant service providers to disclose information supplied by me in support of this election of transfer to the approved trustee(s) concerned and the relevant service providers.

### 重要事項：

成員簽署必須與原強積金計劃保存的記錄相同，如有需要，可提供多於一個的簽名模式。

### Important Note:

Signature of member MUST be the same as the record kept by the original MPF scheme. More than one signature is allowed if available.

(12) 本人聲

(a) 本人

I hereby

and

(b) 本人

最近

I collect

"Personal Information Collection Statement (Version 2018-03)" and the latest Principal Brochure; and

(c) 盡本人所知所信，本表格所提供的資料正確及詳盡。

To the best of my knowledge and belief, the information given in this Form is correct and complete.

(13)  本人不同意收取由受託人發出的推廣資訊。

I do not wish to receive marketing information from Trustee.

計劃成員簽署 <sup>註6</sup> Signature of the scheme member <sup>Note 6</sup>

請簽署 Please sign here **X**

(日/月/年 DD/MM/YYYY) \_\_\_\_\_

請填妥本表格的第 1 至第 3 頁，並將填妥表格遞交(填報須知及計劃成員轉移權益須知無須提交)予新受託人。

Please complete this Form at page 1 to 3 and submit it (excluding the Explanatory Notes and Notes to Transfer Benefits by Scheme Member) to new trustee.

請將填妥表格交予：永明彩虹強積金計劃行政管理人 — 卓譽金融服務有限公司  
香港九龍紅磡德輔道中 18 號海濱廣場一座 10 樓 電話 3183 1888 傳真 3183 1889

Please send the completed form to: Sun Life Rainbow MPF Scheme, The Administrator, BestServe Financial Limited  
10/F, One Harbourfront, 18 Tak Fung Street, Hungghom, Kowloon, Hong Kong Tel 3183 1888 Fax 3183 1889

只供本公司填寫 - 強積金中介人資料 FOR OFFICE USE ONLY - MPF Intermediary Details

只適用於理財顧問 / 保險代理公司 For Agent / Company Agent only

本人確認於此次權益轉移中涉及 / 進行受規管活動。 I confirm that regulated activity is involved / conducted in this benefits transfer.

如本人：(i) 沒有於上方格填上駁號；及(ii) 沒有遞交「強積金客戶聲明書」，即代表本人於此次權益轉移中並沒有進行受規管活動。 If I have not: (i) ticked the box above; and (ii) submitted any "MPF Customer Declaration Form", it shall be regarded as no regulated activity is conducted in this benefits transfer.

附註：若當中涉及 / 進行受規管活動，此申請表格必須跟客戶已簽署之「強積金客戶聲明書」一併遞交。

NOTE: If regulated activity is involved / conducted, then this request form must be accompanied by a duly signed "MPF Customer Declaration Form".

理財顧問適用 For Agent

經紀 / 保險代理公司適用 For Broker / Company Agent

姓名  
Name : \_\_\_\_\_

經紀/保險代理公司名稱  
Name of Broker/Company Agent : \_\_\_\_\_

編號  
Code : \_\_\_\_\_

經紀/保險代理公司編號  
Code of Broker/Company Agent : \_\_\_\_\_

顧問姓名  
Name of Consultant : \_\_\_\_\_

強積金註冊編號  
MPF Card Registration No. : \_\_\_\_\_

經紀/保險代理公司強積金註冊編號  
MPF Card Registration No. of Broker/Company Agent : \_\_\_\_\_

顧問強積金註冊編號  
MPF Card Registration No. of Consultant : \_\_\_\_\_

## 第六部 Section VI 填報須知 EXPLANATORY NOTES

(1) 如您沒有香港身份證，請填上您在護照上的姓名。 If you do NOT possess a HKID Card, please fill in your name as shown on your passport.

(2) 請注意，如您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。您可透過以下途徑獲取有關資料：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:

- (a) 查閱成員證明書、接納通知書、參與通知書；或 in your membership certificate, notice of acceptance, or notice of participation; or
- (b) 查閱周年權益報表或核准受託人提供的其他報表；或 in your annual benefit statement, or other statements provided by the approved trustee; or
- (c) 核准受託人提供的成員查詢服務。through the member enquiry facilities available from approved trustees.

如有疑問，請聯絡您的原受託人或僱主。 If you are in doubt, please contact your original trustee or your employer.

(3) 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識別號碼（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）。您可查詢核准受託人發出的報表或透過核准受託人提供的成員諮詢服務獲取該號碼。如有疑問，請聯絡您的核准受託人或僱主。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 approved trustees. If you are in doubt, please contact your approved trustee or your employer.

(4) 請注意，如您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，或所提供資料有誤，則此項轉移要求或不獲處理。您可透過以下途徑獲取有關資料：Please note that 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:

- (a) 查閱成員證明書、接納通知書、參與通知書；或 in your membership certificate, notice of acceptance, or notice of participation; or
- (b) 查閱周年權益報表或核准受託人提供的其他報表；或 in your annual benefit statement, or other statements provided by the approved trustee; or
- (c) 核准受託人提供的成員查詢服務。through the member enquiry facilities available from approved trustees.

不過，如您最近才參加計劃，並未獲悉新的成員帳戶號碼，則可留空此項。如有疑問，請聯絡您的新受託人。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.

(5) 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從自願性供款所產生的累積權益。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，請聯絡您的原受託人。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 approved trustee. If you are in doubt, please contact your original trustee.

您的簽署必須與您之前提交予原受託人的簽名式樣相同。請注意，若本表格上的簽署與您之前給予原受託人的簽名式樣不符，有關轉移或不獲處理。如有疑問，請聯絡您的原受託人。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.



## 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）

## NOTES TO TRANSFER BENEFITS BY SCHEME MEMBER

## (For self-employed person, personal account holder or employee ceasing employment)

《強制性公積金計劃（一般）規例》（簡稱《規例》）第 145、146、147、148 及 149 條

Sections 145, 146, 147, 148 and 149 of the Mandatory Provident Fund Schemes (General) Regulation ("the Regulation")

填寫第 MPF(S)-P(M)號表格前，請先閱讀下列重要資料。Please read the following important information before you complete Form MPF(S)-P(M).

## (1) 用詞定義： Definition of Terms:

- (a) 「供款帳戶」— 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。“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.
- (b) 「個人帳戶」— 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。“Personal account” - an account in an MPF scheme which is mainly used to receive the accrued benefits transferred from another account(s).
- (c) 「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」）— 指轉出您的累算權益的強積金計劃的受託人。“Original trustee” (also known as “transferor trustee” in the Mandatory Provident Fund Schemes (General) Regulation (“the Regulation”)) - the trustee of an MPF scheme from which your accrued benefits are to be transferred.
- (d) 「新受託人」（在《規例》中亦稱「承轉受託人」）— 指轉入您的累算權益的強積金計劃的受託人。如您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。“New trustee” (also known as “transferee trustee” in the Regulation) - the 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.
- (e) 「原計劃」— 指轉出您的累算權益的強積金計劃。“Original scheme” - the MPF scheme from which your accrued benefits are to be transferred.
- (f) 「新計劃」— 指轉入您的累算權益的強積金計劃。如您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。“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.
- (2) 如您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您不符合部分或所有保證條件，從而影響您享有保證的資格。有關詳情請查閱原計劃的要約文件或向原受託人查詢。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.
- (3) 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，如您(a)沒有或尚未就有關帳戶向您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。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.
- (4) 如您已年滿或快將年滿 50 歲，而現時您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您的投資風險的時間，與接獲您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。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.
- (5) 請確保您在新計劃已開立個人帳戶或供款帳戶。否則，您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。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.
- (6) 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。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.
- (7) 如欲在現職期間從您的供款帳戶轉出累算權益，請填寫第 MPF(S)-P(P)號表格。If you wish to transfer-out the accrued benefits from your contribution account during employment, you should complete Form MPF(S)-P(P).
- (8) 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。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.
- (9) 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。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.
- (10) 若您第 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，核准受託人可能無法處理您的權益轉移要求。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.
- (11) 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](http://www.mpfa.org.hk)）的相關宣傳刊物。Please refer to the publication of the Mandatory Provident Fund Schemes Authority (“MPFA”) available from the MPFA website ([www.mpfa.org.hk](http://www.mpfa.org.hk)) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment.
- (12) 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。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.
- (13) 如欲就你的權益轉移申請作出查詢或尋求協助，請聯絡您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](mailto:mpfa@mpfa.org.hk) 或熱線電話：2918 0102）。If you wish to make enquiries or seek assistance in relation to your election to transfer, please contact your original trustee or new trustee. For general enquiries regarding benefit transfer, you may contact the Mandatory Provident Fund Schemes Authority (“MPFA”) via e-mail: [mpfa@mpfa.org.hk](mailto:mpfa@mpfa.org.hk) or hotline: 2918 0102.

## 個人資料收集聲明

### PERSONAL INFORMATION COLLECTION STATEMENT

申請人／成員明白及同意永明信託有限公司(「受託人」) 可以將其所收集的任何個人資料(不論由此申請表所收集或由其他途徑取得)作以下用途: (i) 處理成員的此項申請及任何其他申請; (ii) 為申請人／成員參與本計劃; (iii) 管理成員於本計劃的供款和累算權益的事宜; (iv) 進行客戶調查; (v) 為客戶研究及設計金融、保險或退休金產品; (vi) 為申請人／成員甄選及參與獎賞、忠實或特選客戶計劃; (vii) 因上述目的與成員聯絡; (viii) 與上述目的直接有關的任何其他目的; 及 (xi) 為遵守適用的法例、法規或法庭命令。

受託人亦可使用申請人／成員的聯絡資料，基本個人資料投資選擇及累算權益，就本計劃的產品的推廣資訊，以包括電話、郵件、電郵、電話短訊或任何電子信息等方法聯絡申請人／成員。除非得到申請人／成員同意(包括表示不反對)，否則受託人不可使用申請人／成員資料為該用途。若申請人／成員不同意接受此等推廣資訊，可於表格的聲明和授權部份適當位置填上剔號。

受託人可為以上目的披露申請人／成員的個人資料予(a) 為協助受託人就上述用途(不論在香港或其他地方) 而提供服務的第三方，包括計劃管理人(條件是有關承辦商須把所有個人資料保密並只會為提供有關服務而使用個人資料); (b) 申請人／成員的銀行作繳款用途; (c) 申請人／成員的保險經紀(如有); (d) 申請人／成員的強積金中介人; (e) 受託人的關連公司(根據公司條例訂明)包括保險公司及金融服務機構; (f) 受託人及其關連公司(不論在香港與否) 為遵守監管當局或其他機構發出之指引或其就法例、法規或法庭頒令所約束或規定之責任而需向其作出披露的任何人士; (g) 有關僱主; 及(h) 按法例要求或准許的其他人仕。

受託人可就法例准許或於獲得申請人／成員的同意後披露或將申請人／成員的個人資料作其他用途。

申請人／成員明白申請人／成員所提供之個人資料均屬自願，然而倘若未能提供所需個人資料，可導致受託人無法處理申請人／成員的申請。申請人／成員有權查閱及要求更正受託人持有有關成員的個人資料，有關要求可以書面形式郵寄至香港九龍紅磡德豐街 18 號海濱廣場一座 10 樓卓譽金融服務有限公司退休金管理部經理。受託人可就處理任何該等要求收取合理費用。

Applicant/Member(s) understand(s) and consent(s) that, any personal data collected by Sun Life Trustee Company Limited ("Trustee") (whether collected in this application form or otherwise) may be used by the Trustee for the following purposes: (i) processing this application and any other applications applicant/member(s) make(s); (ii) enrolling applicant/member(s) in the Scheme; (iii) administering and managing applicant/member(s)' contributions and accrued benefits under the Scheme; (iv) conducting customer surveys; (v) researching and designing financial, insurance or pensions products for customer use; (vi) selecting and participating in reward, loyalty or privileges program and related service for applicant/member(s); (vii) contacting applicant/member(s) for the above purposes; (viii) purposes which are directly related to the above purposes; and (ix) complying with applicable laws, regulation or court order.

The Trustee may also use applicant/member(s)' contact details, demographic information, investment choices and accrued benefits to contact applicant/member(s) with marketing information regarding the Scheme, including by phone calls, mail, email, SMS or any type of electronic message. The Trustee may not so use applicant/member(s)' data unless the Trustee have received applicant/member(s)' consent (which includes an indication of no objection). Tick the box in appropriate area under the Declaration and Authorization in the form if member(s) do(es) not consent to receive such marketing information.

The Trustee may disclose member(s)' personal data for the above purposes : (a) to third parties who provide services in Hong Kong or elsewhere which assist the Trustee to carry out the above purposes, including scheme administrator (provided that such contractors are required to keep all such personal data confidential and may only use the personal data to provide those services); (b) to applicant/member(s)' bank for payment purposes; (c) to applicant/member(s)' insurance broker (if any); (d) to applicant/member(s)' MPF intermediaries; (e) to the Trustee's related companies (as defined in the Companies Ordinance) including insurance companies and financial services companies; (f) to any person to whom the Trustee or its related companies (inside or outside Hong Kong) is under an obligation to make disclosure under the requirements of any law, regulation or court order binding on or applying to or to which the Trustee or its related companies (inside or outside Hong Kong) is subject to, or under and for the purposes of any guidelines issued by regulatory or other authorities with which the Trustee or its related companies (inside or outside Hong Kong) is expected to comply; (g) relevant employer(s) and (h) as otherwise required or permitted by law.

The Trustee may also use and disclose member(s)' personal data in other ways with applicant/member(s)' consent or as otherwise required or permitted by law.

Applicant/Member(s) understand(s) that the information applicant/member(s) gave is voluntary, but failure to provide the requested personal data may mean the Trustee is unable to process applicant/member(s)' application. Applicant/Member(s) has/have the right to seek access to and request correction of any personal data the Trustee holds by sending a written request to The Manager, Pensions Administration Department, BestServe Financial Limited, 10/F, One HarbourFront, 18 Tak Fung Street, Hung Hom, Hong Kong. The Trustee may charge a reasonable fee for the processing of any such requests.