



**SUN LIFE MPF BASIC / COMPREHENSIVE SCHEME**  
**(Formerly named FWD MPF MASTER TRUST BASIC / COMPREHENSIVE SCHEME)**  
**SELF-EMPLOYED PERSON INFORMATION CHANGE FORM**

永明強積金基本 / 綜合計劃  
(前計劃名稱為富衛強積金集成信託基本 / 綜合計劃)

自僱人士資料更改表格

**Notes 注意**

1. This form will supersede any relevant information/form(s) which has/have been submitted to the Administrator previously.  
本表格將取代所有有關之前已遞交行政管理人的資料/表格。
2. All sections below should be completed in BLOCK letters.  
所有部份須以正楷填寫。

Self-employed Person Name (English) 自僱人士姓名 (英文)	_____	Member No. 成員編號	_____
Self-employed Person Name (Chinese) 自僱人士姓名 (中文)	_____	HKID / Passport <sup>+</sup> No. 香港身份證 / 護照 <sup>+</sup> 號碼	_____
Telephone No. 電話號碼	_____		

**(ONLY complete sections with changes) (只需填上須更改部份)**

**1. Change of Self-employed Person Details 更改自僱人士資料**

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

Effective Date of change (dd / mm / yyyy)  
更改之生效日期 (日 / 月 / 年) \_\_\_\_\_

**Change of Company Name\* 更改公司名稱\***

New Company Name (English)  
新公司名稱 (英文) \_\_\_\_\_

New Company Name (Chinese)  
新公司名稱 (中文) \_\_\_\_\_

\*Please attach copy of the new Business Registration Certificate (if applicable) for the above changes.  
請提供新的商業登記證之副本(如適用)以更改以上資料。

**Change of Self-employed Person Name# 更改自僱人士姓名#**

Name 姓名 (English 英文) \_\_\_\_\_ (Chinese 中文) \_\_\_\_\_

(same in HKID card / Passport 與香港身份證 / 護照上的相同) \_\_\_\_\_

(Surname 姓) \_\_\_\_\_ (Given Name 名) \_\_\_\_\_ (Surname 姓) \_\_\_\_\_ (Given Name 名) \_\_\_\_\_

Title 稱銜 Mr/Mrs/Ms/Miss/Others<sup>+</sup>  
先生/太太/女士/小姐/其他 \_\_\_\_\_

New Specimen Signature  
新簽署式樣 \_\_\_\_\_

# Please enclose a copy of the new HKID card / Passport and Deed Poll  
請附上新的香港身份證 / 護照及改名契副本

**New Business Address 新營業地址**

Flat / Room 室 Floor 樓 Block 座 Building / Estate 大廈 / 屋邨 \_\_\_\_\_

Number and Name of Street / Road 門牌號碼及街道名稱 District Area 地區 \_\_\_\_\_

Hong Kong 香港  Kowloon 九龍  
 New Territories 新界  Outlying Islands 離島

**New Residential Address 新住址**

Flat / Room 室 Floor 樓 Block 座 Building / Estate 大廈 / 屋邨 \_\_\_\_\_

Number and Name of Street / Road 門牌號碼及街道名稱 District Area 地區 \_\_\_\_\_

Hong Kong 香港  Kowloon 九龍  
 New Territories 新界  Outlying Islands 離島

**New Correspondence Address 新通訊地址**  Same as Business Address 如同營業地址  Same as Residential Address 如同住址

New Contact Telephone No. 新聯絡電話號碼 \_\_\_\_\_

Office 公司 \_\_\_\_\_ Mobile 手提電話 \_\_\_\_\_ Fax No. 傳真號碼 \_\_\_\_\_

New Email Address (if any) 新電郵地址(如有) \_\_\_\_\_

<sup>+</sup> Please delete whichever is inappropriate 請刪除不適用者



## MPF Account Information SMS Service 強積金帳戶資訊短訊提示服務

Members who registered for this service can receive SMS providing information of account balance amount as of the previous month end on monthly basis. Service details are as follows:  
每個月以短訊形式向已登記此服務的成員提供強積金帳戶截至上個月尾的帳戶結餘。服務詳情如下：

1. This service will be only available to members with HKID card. 本服務只提供予持有香港身份證成員。
2. This service covers all existing accounts under the SAME HKID number. 本服務包括同一香港身份證號碼下的所有現存帳戶。
3. SMS will be sent out to the valid mobile number provided in this form or the latest updated valid mobile number. 短訊將會發予此表格提供之有效手提電話號碼或及後更新的有效手提電話號碼。
4. Valid mobile number in the latest created member account is used to receive SMS if members hold more than 1 account. 如成員持有超過一個帳戶，短訊會發予最後成立帳戶紀錄的有效手提電話號碼。

I understand the terms and **agree** to enrol for this service. 本人明白以上內容並**同意**參加此項服務。

If you do not check (✓) the above box, you will not be enrolled to this service. 如閣下沒有在以上方格內加上剔號(✓)，閣下將被視為不參加此項服務。

SMS Language (Chinese is the default language if the box is not ticked):  Chinese  English

短訊服務語言（如沒有選擇，短訊語言將設定為中文）  中文  英文

I **request to cancel** this service. 本人**要求取消**此項服務。(This request is only applicable if you are currently using the MPF Account Information SMS Service. 只適用於現已使用強積金帳戶資訊短訊提示服務。)

## 2. Change of Contribution Arrangement 更改供款方式

(The Contribution Arrangement will be applied to both Mandatory Contributions and Voluntary Contributions, if any.  
供款方式將適用於強制性供款及自願性供款(如適用))

Effective Date of change (dd / mm / yyyy)

更改之生效日期(日/月/年)

Yearly; or  
每年一次; 或

Monthly; please choose Contribution Day:  
每月一次; 請選擇供款日

1st of the month; or  
每月 1 號; 或

15th of the month  
每月 15 號

Note: If you choose to contribute yearly, you need to pay contributions on or before the end of the financial year of the scheme. The financial year of the scheme ends on 31 December each year. If you choose to contribute monthly, you need to pay contributions on or before the Contribution Day specified by you. According to Mandatory Provident Fund Schemes (General) Regulation, the Contribution Day is the last day of the Contribution Period, which is also the due date for making your contribution for the relevant Contribution Period.

註: 如選擇按年供款, 您須於本計劃財政年度結束或以前作出供款。本計劃的財政年度終結日為每年的 12 月 31 日。如選擇按月供款, 您須於所指定的供款日或以前作出供款。根據強制性公積金計劃(一般)規例, 供款日為供款期之終結日, 亦為該供款期之供款到期日。

## 3. Change of Payment Method 更改付款方法

Effective Date of change (dd / mm / yyyy)

更改之生效日期(日/月/年)

By cheque 支票

By Direct Debit 直接付款

(Please complete the "Direct Debit Authorisation Form" 請另行填寫「直接付款授權書」)

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

#### 4. Change of Voluntary Contributions Details 更改自願性供款詳情

Effective Date of change (dd / mm / yyyy) 更改之生效日期 (日 / 月 / 年)		Please tick (✓) the appropriate box(es) 請在適當方格加上(✓) 號
I would like to make the following arrangement for my voluntary contributions with effect from the above Effective Date of change: 由上述更改之生效日期起, 本人之自願性供款將作出以下安排:		
<input type="checkbox"/> (1) To terminate my Voluntary Contributions 終止本人之自願性供款		
<input type="checkbox"/> (2) To change the Commencement Date of Voluntary Contributions 更改開始自願性供款日期		(dd 日/mm 月/yyyy 年)
<input type="checkbox"/> (3) To make my Voluntary Contributions in the amount of 作出本人之自願性供款, 款額為 <i>(If you would like to change the investment allocation for Voluntary Contributions, please complete the "Asset Allocation Change / Existing Asset Switching Form" (Note 2). 若閣下欲更改自願性供款的投資分配, 請填寫「更改資產分配/現有積存資產轉換表格」(註 2).)</i>	HKD 港幣	
<input type="checkbox"/> (4) To change my Voluntary Contributions in the amount of 更改本人之自願性供款, 款額為 <i>(If you would like to change the investment allocation for Voluntary Contributions, please complete the "Asset Allocation Change / Existing Asset Switching Form" (Note 2). 若閣下欲更改自願性供款的投資分配, 請填寫「更改資產分配/現有積存資產轉換表格」(註 2).)</i>	HKD 港幣	
Notes:		
1. Voluntary Contributions in respect of a member will be ceased immediately upon the Administrator's receipt of the written notification on the adjudicated bankruptcy of the member.		
2. (i) If no Investment Allocation for Voluntary Contribution has been made by you previously, the Trustee shall invest those voluntary contributions in Default Investment Strategy ("DIS");		
(ii) If Investment Allocation for Voluntary Contributions has been made by you previously, the Trustee shall invest those voluntary contributions according to the latest Investment Allocation for Voluntary Contributions; or		
(iii) If you would like to change the Investment Allocation for Voluntary Contribution, please complete the "Asset Allocation Change / Existing Asset Switching Form".		
註:		
1. 當行政管理人收到成員被宣判破產之書面通知時, 有關成員之自願性供款將立即停止。		
2. (i) 若閣下從未就自願性供款作出投資分配, 則受託人將會把供款投資於「預設投資策略」;		
(ii) 若閣下以往曾就自願性供款作出投資分配, 則受託人將會把供款根據閣下最近的投資分配作出投資; 或		
(iii) 若閣下欲更改自願性供款的投資分配, 請填妥「更改資產分配/現有積存資產轉換表格」。		

#### Declaration 聲明

<p>I hereby confirm that all the information given above and the attached document(s) (if any) are complete, true and correct and is given to the best of my knowledge. 本人謹此確定上述所有資料及附上之文件 (如有) 均是完整、真實及準確, 並且是盡本人所知而作答。</p>	<p style="text-align: center;">Signature of Member* 成員簽署*</p> <div style="border: 1px dashed black; height: 40px; width: 100%;"></div> <p style="text-align: center;">Date 日期 (dd 日/mm 月/yyyy 年) _____</p>
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\* Signature of Member must be same as the previous specimen submitted to Sun Life MPF Basic Scheme / Sun Life MPF Comprehensive Scheme, The Administrator, BestServe Financial Limited.

\* 成員簽署式樣必須與之前遞交予永明強積金基本計劃 / 永明強積金綜合計劃行政管理人 - 卓譽金融服務有限公司的式樣相同。

For office use only: Processed by: _____	Date: _____	Checked by: _____	Date: _____
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**Sun Life Pension Trust Limited 永明退休金信託有限公司**

Please send the completed form to: Sun Life MPF Basic Scheme / Sun Life MPF Comprehensive Scheme, The Administrator, BestServe Financial Limited  
10/F, One Harbourfront, 18 Tak Fung Street, Hung Hom, Kowloon, Hong Kong Tel 3183 1900 Fax 3183 1901

請將填妥表格交予: 永明強積金基本計劃 / 永明強積金綜合計劃行政管理人-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 電話 3183 1900 傳真 3183 1901