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Please submit this form with required document(s) listed in Note 1.

文件編號
Form Code
SPA



永明彩虹強積金計劃 – 特選私人帳戶申請表格

SUN LIFE RAINBOW MPF SCHEME – SPECIAL PRIVATE ACCOUNT APPLICATION FORM

致：永明信託有限公司 (「受託人」)

香港永明金融有限公司 (於百慕達註冊成立) (「保薦人」)

To: Sun Life Trustee Company Limited ("Trustee")

Sun Life Hong Kong Limited (Incorporated in Bermuda) ("Sponsor")

此申請表格適用於合乎資格人士參加永明彩虹強積金計劃的特選私人帳戶。此表格應與永明彩虹強積金計劃最近期的《主要推銷刊物》同時閱讀。若對本表格之內容有任何疑問，應諮詢律師、會計師或其他財務顧問。This application form should be completed by an eligible person who applies to join Special Private Account of Sun Life Rainbow MPF Scheme. This application should be read in conjunction with the latest Principal Brochure of Sun Life Rainbow MPF Scheme. If you are in doubt about the contents of this application, you should consult your solicitor, accountant or other financial advisor.

所有部分須以英文正楷填寫並在適當地方簽名作實。Complete all sections in English and in BLOCK letters and sign where necessary.

第一部分 Section I 申請人士資料 Details of Applicant

姓名 Name (英文 English)

(須與香港身份證上的相同)

(姓 Surname)

(名 Given Name)

姓名 Name (中文 Chinese)

(須與香港身份證上的相同)

(姓 Surname)

(名 Given Name)

稱謂 先生/女士/小姐/其他*

Title Mr/Ms/Miss/Others*

註:請附上身份證副本以作核對之用 Note: Please attach a photocopy of your HKID card for verification purpose

出生日期^{備註 2 及 3}

Date of Birth^{Note 2 & 3}

日 dd / 月 mm / 年 yyyy

香港身份證號碼

HKID Card No.

國籍

Nationality

職業

Occupation

電話號碼

Telephone No. Home

手提電話

Mobile

傳真號碼

Fax No.

電郵地址

Email Address

語言選擇 (用作將來與成員聯絡通訊之用) Language Selection (For Future Member Communication Usage)#

中文 Chinese

英文 English

住址 (郵政信箱恕不受理)

Residential Address (P.O. Box will not be accepted)

通訊地址 (如與以上不同)

Correspondence Address (if different from above)

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

每季以短訊形式向成員提供自帳戶成立日截至季末的 1) 帳戶結餘及 2) 盈/虧總額。服務詳情如下:

Members receive a SMS providing information of 1) account balance and 2) gain/loss amount since account setup to the quarter end on quarterly basis. Service details are as follows:

1. 本服務只提供予持有香港身份證成員。This service will be only available to members with HKID card.
2. 本服務包括同一香港身份證號碼下的所有現存帳戶。This service covers all existing accounts under the SAME HKID number.
3. 短訊以表格第一部分提供之有效手提電話號碼或及後更新之有效手提電話號碼發出。SMS is sent out by using valid mobile number provided in Section I of this form or the latest updated valid mobile number.
4. 如成員持有超過一個帳戶，短訊會根據最後成立帳戶紀錄之有效手提電話號碼發出。Valid mobile number in the latest created member account is used to send SMS if members hold more than 1 account.
5. 短訊語言將根據表格第一部分提供之語言選擇。SMS language will follow the language selection stated in Section I of this form.

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

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

備註 Notes:

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

如沒有在提供之語言選項中作出選擇，語言選擇將被設定為「中文」。Your language selection will be defaulted as "Chinese" if neither one of the provided option is chosen.

1 請附上成員的香港身份證/護照及住址證明副本一併遞交申請。可接納為住址證明文件的是由水/電/煤/中央石油氣供應商、銀行、政府部門等在申請日前三個月內發出的文件、收費單或通知書。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。Please attach a copy of member's HKID Card/passport AND address proof during application submission. Valid address proof is document, bill or correspondence issued within the last three months from the application date by utility companies, banks, government departments etc. If you cannot provide a copy 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.

2 如成員的香港身份證上只有出生年份，而沒有其他證件證明成員的實際出生日期(例如出生證明書或護照)，我們將以該年之12月31日作為成員的出生日期。同樣，如成員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成員的出生日期。請注意，若成員沒有填寫日子及/或月份，成員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。If the member's HKID Card only contains the year of birth and the member has no other form of identification to prove the exact date of birth (e.g. Birth Certificate or Passport), we shall adopt 31 December as the day and month of the member's birthday. Likewise, if the member's HKID Card contains only year and month but not the date of birth, we shall adopt the last day of the month as the member's birthday. If the member leaves the day and/or month blank, we shall follow the above rules to adopt the member's date of birth as the last day of that month or 31 December.

3 不論為預設或按成員的投資指示，如成員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，每年於成員生日當天進行自動調整永明強積金核心累積基金及永明強積金 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。若成員隨後更新出生日期，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: (i) 若只獲悉出生年份和月份，每年降低風險安排將會於出生月份的最後曆日或倘若該最後曆日並非交易日，則於下一個交易日進行。(ii) 若只獲悉出生年份，每年降低風險安排將會於每年的最後曆日或倘若該最後曆日並非交易日，則於下一個交易日進行。(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永明強積金 65 歲後基金，而不會進行降低風險安排。因此，成員需要與身份證/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。If the member's investment instructions is Default Investment Strategy ("DIS") either set by default or by choice, we shall perform annual de-risking of the member's benefits invested in DIS based on the birth date provided to automatically adjust the holdings in the Sun Life MPF Core Accumulation Fund and the Sun Life MPF Age 65 Plus Fund (collectively the "DIS Funds"). If the member subsequently provides us with an updated date of birth, the Trustee will adjust the holdings between the 2 DIS Funds according to the member's 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: (i) If only the year and month of birth is available, the annual de-risking will use 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 use 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 Sun Life MPF Age 65 Plus Fund with no de-risking applied. Therefore, the member should provide date of birth same as 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.



第二部分 Section II 供款指引 Instruction for Contribution

供款模式: Contribution Mode:

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

<input type="checkbox"/>	按月供款 Monthly Basis	港幣 HKD	供款開始日期 Commencement date of contribution 0 1 / / / / / / / (日 DD/月 MM/年 YYYY) 按月供款的最低供款金額為 300 港元。The minimum amount of monthly contribution is HK\$300. 按月供款應以自動轉帳繳付,而繳付供款扣帳日期為每月的 10 號或下一個銀行營業日(如扣帳日並非銀行營業日)。請另行填寫「直接付款授權書」並連同本申請表格遞交。辦理自動轉帳手續約需時六至八星期。自動轉帳的生效日期將另函通知。成員可考慮於自動轉帳安排正式生效前採用支票以整筆供款模式作出供款。The monthly contribution must be made by autopay and the debit date will be on 10 th of each calendar month or the following bank business day if the debit day is not a bank business day. Please complete a "Direct Debit Authorization form" and submit with this application form. The autopay set up takes approximately 6 to 8 weeks from receipt of your completed form. We will notify you the effective date of autopay. You may make lump-sum payment by cheque before your autopay facility is established.
<input type="checkbox"/>	整筆供款 Lump Sum Basis	港幣 HKD	整筆供款最低供款金額為 3,000 港元。The minimum amount of lump sum contribution is HK\$3,000. 整筆供款必須隨本表格以劃線支票支付。The lump sum payment must be made by enclosing a crossed cheque.

劃線支票抬頭為「永明信託有限公司-強積金」。The crossed cheque should be made payable to "Sun Life Trustee Company Limited – MPF".

銀行名稱 Bank Name _____ 支票號碼 Cheque No. _____

備註: 請於支票背面寫上姓名及香港身份證號碼以作參考。Note: Please quote the Full Name and HKID No. at the back of the cheque for reference.

第三部分 Section III 投資選擇 Investment Choice

就本人特選私人帳戶的投資選擇如下^{Note 4}:

My investment choice in respect of Special Private Account is specified as follows ^{Note 4}:

請只選其中一項 Please choose ONE only 請在適當方格加上 (✓) Please tick (✓) the appropriate box

選擇 1 - 預設投資策略 Option 1 – Default Investment Strategy

「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，即永明強積金核心累積基金和永明強積金65歲後基金（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《主要推銷刊物》。

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 Sun Life MPF Core Accumulation Fund and the Sun Life 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 Principal Brochure of the Scheme.

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本計劃《主要推銷刊物》中第 3.1A.2 部分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。

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 under section 3.1A.2 in the Principal Brochure of the Scheme 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.

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

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

基金自動導航系統 — 本人作出的特選私人帳戶供款，將依照本人的年齡及預設基金選擇而作出投資，其後亦會隨本人年齡遞增而於本人生日當天或生日後之下一個交易日(如生日當天不是交易日)，根據預設基金選擇自動更改未來供款的投資授權和自動轉換現有結餘的投資組合。詳情已刊登於有關的《主要推銷刊物》。

Fund Cruiser — All contribution to the Special Voluntary Account made by myself will be invested in accordance with the pre-determined fund choices based on my age. The investment mandate for future contribution will be automatically changed and existing balance be automatically switched on my birthday or the first dealing day following my birthday (if my birthday falls on a non-dealing day). Details have been stated in the relevant "Principal Brochure".

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

選擇 3 – 自選基金組合 Option 3 – Own Investment Choice Program

請在下方填寫供款分配指示。Please provide contribution allocation instruction below.

成份基金 Constituent Fund	基金編號 Fund Code	供款分配 (5%的倍數) Contribution Allocation (in multiples of 5%)	
永明強積金保守基金 Sun Life MPF Conservative Fund	CRCPF		%
永明強積金港元債券基金 Sun Life MPF Hong Kong Dollar Bond Fund	CRFIG		%
永明強積金環球債券基金 Sun Life MPF Global Bond Fund	SLFGB		%
永明強積金人民幣及港元基金 Sun Life MPF RMB and HKD Fund	SLRMB		%
永明強積金 65 歲後基金 ^{備註 5} Sun Life MPF Age 65 Plus Fund ^{Note 5}	SL65		%
永明強積金平穩基金 Sun Life MPF Stable Fund	CRSIF		%
永明強積金均衡基金 Sun Life MPF Balanced Fund	CRBPF		%
永明強積金核心累積基金 ^{備註 5} Sun Life MPF Core Accumulation Fund ^{Note 5}	SLCA		%
永明強積金增長基金 Sun Life MPF Growth Fund	CRPGF		%
永明強積金行業股票基金 Sun Life MPF Multi-Sector Equity Fund	SLIGE		%
永明強積金亞洲股票基金 Sun Life MPF Asian Equity Fund	SLRAE		%
永明強積金大中華股票基金 Sun Life MPF Greater China Equity Fund	SLIHC		%
永明富時強積金香港指數基金 Sun Life FTSE MPF Hong Kong Index Fund	SLTHI		%
永明強積金香港股票基金 Sun Life MPF Hong Kong Equity Fund	CRHKE		%
	總數 Total	100	%

備註: Notes

4 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) 成員未有於第五部份簽署，相關供款將會全數(100%)投資於預設投資策略，直至受託人收到並完成處理成員的進一步投資選擇指示。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 the member's signature in Section V, the relevant 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.

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

第四部分 Section IV 聲明和授權 DECLARATION AND AUTHORISATION

本人特此申請加入受託人成立的本計劃。

本人特此向受託人承諾遵守信託契據的規定以及一切適用法律和規例，並受該等規定、法律和規例所約束。

本人明白及同意如本人現在或曾為本計劃，其他強制性公積金計劃或職業退休計劃(註冊於職業退休計劃條例)之成員，可參與本計劃成立特選私人帳戶。本人謹此確認現在或曾為強制性公積金計劃或職業退休計劃(註冊於職業退休計劃條例)之成員以符合在本計劃成立特選私人帳戶。

本人保證，在本申請表格提供的所有資料在各方面均為真實準確。本人進一步承諾，如果所提供的資料有任何改變，本人應於合理的切實可行範圍內盡快將改變通知受託人。

本人同意，按照本申請表格內列明的資料，作出根據本計劃規則下的自選個人供款。此外，本人理解，對於本人所作的供款，本人將負責作出投資選擇，如果本人未能作出該等投資選擇，則所有供款將按信託契據的條款投資。本人理解，如本人死亡，本人在計劃的所有累積權益將支付給本人遺產代理人。

本人明白，如果本人未能向受託人提供本申請表內所需的所有資料，受託人可能無法建立本人的成員記錄。在這種情形下，本人作出的任何供款將不能按照本人在申請表的投資選擇進行投資，但可由受託人投資於預設投資策略，直至受託人收到有關資料並且建立本人的成員記錄為止。

本人特此授權持有本人任何記錄、資料或消息的任何政府辦事處、團體或個人，在受託人或其代表要求下，可向該受託人或其代表透露、發放或轉移就處理本申請及管理本計劃有關的該等記錄或資料。

本人確認已收到、閱讀和明白附件《個人資料收集聲明(2018-03 版本)》中的條款及最近期的《主要推銷刊物》。

本人不同意收取由受託人發出的推廣資訊。

I hereby apply to join the Scheme established by the Trustee.

I hereby covenant with the Trustee to comply with and be bound by the provisions of the Trust Deed and all applicable laws and regulations.

I understand and agree that I can participate as a Special Private Account ("SPA") member if I am or was previously a member of the Scheme, another mandatory provident fund scheme or an occupational retirement scheme (registered under the Occupational Retirement Schemes Ordinance). I further confirm that I am or was a member of a mandatory provident fund scheme or an occupational retirement scheme (registered under the Occupational Retirement Schemes Ordinance) to be eligible for setting up of a SPA in the Scheme.

I warrant that all the information provided in this application form is true and accurate in all respects. I further undertake that if there is any change in the information so provided, I shall notify the Trustee of such change as soon as reasonably practicable.

I agree to make any personal contribution under the Rules of the Scheme as advised in this application form. In addition, I understand that I will be responsible for making the investment choice for my contributions and if I fail to make such investment choice, all the contributions will be invested in accordance with the terms of the Trust Deed. In the event of my death, I understand that all my accrued benefits under the Scheme will be paid to my personal representative(s).

I understand that if I fail to supply complete information as required in this application form, the Trustee may not be able to establish my member record. In which case, any contribution monies made by me will not be invested in accordance with my investment choice as specified in this application form but may be invested by the Trustee at any time into the Default Investment Strategy, until the Trustee receives such information and establishes my member record.

I hereby authorise any government office or any organisation or persons who has any records, knowledge, information of me to disclose, release or transfer to the Trustee or its representatives such record, knowledge or information required for processing this application and for administration of the Scheme upon request by the Trustee or its representatives.

I confirm that I have received, read and understood the terms in the enclosed "Personal Information Collection Statement (Version 2018-03)" and the latest Principal Brochure.

I do not wish to receive marketing information from Trustee.

第五部分 Section V 佣金透露聲明及同意書 COMMISSION DISCLOSURE STATEMENT AND CONSENT

本人明白、確知及同意，香港永明金融有限公司(「永明金融」)會就本人參與永明彩虹強積金計劃期間所收的(i)定期及/或一次性或任何其後之增加供款；及/或(ii)轉入的累積權益；及/或(iii)計劃內所管理的資產(如適用)，向負責安排的獲授權保險經紀代理支付佣金，費用或其他獎賞。

I understand, acknowledge and agree that, as a result of my participation in the Sun Life Rainbow MPF Scheme ("Scheme"), Sun Life Hong Kong Limited ("SLHK") will pay the MPF intermediary a commission, fee or other rewards in respect of (i) contribution (including regular and/or lump sum or any increase thereof); (ii) accrued benefits transfer-in received by the Scheme; and/or (iii) asset managed under the Scheme (if applicable), during the course of the said participation.

成員簽署: Signature of Member:

請簽署 Please sign here X

日期: Date: _____

(日後有關本計劃之簽署，將以此簽署樣式為準。This signature shall also act as specimen signature for future correspondence.)

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
香港九龍紅磡德輔街 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, Hung Hom, Kowloon, Hong Kong Tel 3183 1888 Fax 3183 1889

申請文件清單 Checklist of Application Documents

如未能提供全部所需文件，可能會影響開立此強積金帳戶。MPF account setup may be affected if you do not submit all required documents.

1. 香港身份證／護照副本 Copy of HKID Card/Passport
2. 住址證明 Address Proof(可接納為住址證明文件是由水／電／煤／中央石油氣供應商、銀行、政府部門等在申請日前三個月內發出的文件、收費單或通知書。Valid address proof is document, bill or correspondence issued within the last three months from the application date by utility companies, banks, government departments etc.)

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

只供理財顧問 For Agent

姓名 Name	1) _____	2) _____
編號 Code	1) _____	2) _____
強積金註冊編號 MPF Card Registration No.	1) _____	2) _____

只供經紀 For Broker Only

本人確認已識別本表格之申請人的身份。本人同時確認已根據由政府機構、有關當局或有關當局認可的任何其他可靠及獨立來源所提供的文件、數據或資料（包括由政府機構發出的香港身份證）核實上述人士身份。I confirm that I have identified the applicant of this form. I further confirm that I have verified his/ her identity of the mentioned person on the basis of documents, data or information provided by a governmental body (including the Hong Kong Identity Card), a relevant authority or any other reliable and independent source that is recognized by the relevant authority.

經紀公司名稱 Broker Name	_____	顧問姓名 Name of Consultant	_____
經紀公司編號 Broker Code	_____	顧問電郵地址 Email Address of Consultant	_____
經紀公司強積金註冊編號 Broker MPF Card Registration No.	_____	顧問聯絡電話號碼 Contact No. of Consultant	_____
經紀簽署及公司蓋章 Signature of Broker & Company Chop	_____	顧問強積金註冊編號 Consultant MPF Card Registration No.	_____
簽署人士姓名 Name of Signer	_____		
簽署日期 Date of Sign	_____		

只供保險代理公司 For Company Agent

保險經紀公司名稱 Company Agent Name	_____	顧問姓名 Name of Agent	_____
保險經紀公司編號 Company Agent Code	_____	顧問電郵地址 Email Address of Agent	_____
保險經紀公司強積金註冊編號 Company Agent MPF Card Registration No.	_____	顧問聯絡電話號碼 Contact No. of Agent	_____
		顧問強積金註冊編號 Agent MPF Card Registration No.	_____

來源 Source 直接 Direct 共享 Shared 轉介 Referral

現有永明彩虹公積金計劃客戶?
Existing Sun Life Rainbow ORSO Scheme Client? 是 Yes 否 No

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 (ix) 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士。

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.