

Please read the important notes and explanatory notes carefully before completing this Form

填寫本表格前，請先細讀重要資料及填報須知

SUN LIFE MPF BASIC / COMPREHENSIVE SCHEME
(Formerly named FWD MPF MASTER TRUST BASIC / COMPREHENSIVE SCHEME)

CLAIM FORM FOR PAYMENT OF ACCRUED BENEFITS ON GROUND OF
ATTAINING THE RETIREMENT AGE OF 65 OR EARLY RETIREMENT
[FORM MPF(S) – W(R)]

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)

基於已達到 65 歲退休年齡或提早退休的理由而申索累算權益的表格

Important Notes 重要資料

[第 MPF(S) – W(R) 號表格]

Filling In This Form:

填寫表格：

- (A) This Form is to be completed by any person who wishes to claim for payment of accrued benefits from a registered scheme on the ground of attaining the retirement age of 65 or early retirement only. For a claim made on the ground of early retirement, the scheme member must reach the age of 60 and has permanently ceased all employment and self-employment with no intention of becoming employed or self-employed again. For a claim for payment of accrued benefits on other grounds, please use Form MPF(S) – W(O). 本表格僅供擬基於已達到 65 歲退休年齡或提早退休的理由提出申索，要求從一個註冊計劃提取累算權益的人士填報。若基於提早退休的理由提出申索，計劃成員必須達到 60 歲，並已永久性地終止所有受僱及自僱工作，且無意再次受僱或自僱。若基於其他理由申索累算權益，請填寫第 MPF(S)-W(O) 號表格。
- (B) If the claimant/ scheme member wishes to withdraw accrued benefits from more than one registered scheme, please fill in a separate form for each registered scheme. 如申索人/計劃成員擬從多於一個註冊計劃提取累算權益，須就每個註冊計劃填寫一份表格。
- (C) Please submit the completed form and the required supporting documents to the approved trustee of the registered scheme concerned for processing the claim. If any information provided is incorrect or incomplete, the relevant approved trustee may not be able to process your request. 請把填妥的表格及所需證明文件交予有關註冊計劃的核准受託人，以便處理有關申索。若提供的任何資料不正確或不完整，有關的核准受託人可能無法處理你的申請。
- (D) The personal data supplied in this Form are to be used for processing your claim for payment of accrued benefits. The personal data you supply may, for such purpose, be transferred to the relevant service provider(s) or other appropriate parties including the Mandatory Provident Fund Schemes Authority ("Authority"). 在本表格提供的個人資料，將被用作處理你申索累算權益的申請。你所提供的個人資料可能會為上述目的而轉交相關服務提供者或其他相關機構/人士，包括強制性公積金計劃管理局（「管理局」）。

Reminder Before Submitting a Claim

提交申索前須注意的事項

- (E) Withdrawal of accrued benefits derived from voluntary contributions is subject to the governing rules of the registered scheme concerned. Please check the information from the offering document of the scheme concerned, which can be found on the website of the approved trustee of the scheme concerned. Please consult the relevant approved trustee for details. 提取由自願性供款所產生的累算權益，須受有關註冊計劃的管限規則所規限。詳情請查閱有關計劃的要約文件，而要約文件可於有關計劃核准受託人的網站閱覽。詳情請向有關核准受託人查詢。

Factors to Consider before Selecting Withdrawal Option

選擇提取方式前考慮的因素

- (F) Accrued benefits may be withdrawn on the ground of attaining the retirement age of 65 or early retirement either in a lump sum or by instalments. Before making any decision as regards the amount and timing of withdrawal of accrued benefits, please consider, among other things, your personal needs, risk tolerance level and financial circumstances carefully. The scheme member may be charged the necessary transaction costs for each withdrawal, and additional fees or financial penalties may be charged to or imposed on the scheme member if more than 4 withdrawals by instalments from the same MPF account are made in a calendar year. Please consult the relevant approved trustee for details. 若基於已達到 65 歲退休年齡或提早退休的理由而申索累算權益，可以選擇整筆提取或分期提取。在選擇提取累算權益的金額及時間時，除了其他因素之外，請細心考慮你的個人需要、風險承受能力及財政狀況，然後才作決定。核准受託人可就每次提取向計劃成員收取必需交易費用；如計劃成員在一個公曆年內從同一個強積金帳戶分期提取權益超過 4 次，核准受託人可向該計劃成員收取額外費用或施加罰款。詳情請向有關的核准受託人查詢。

Reminder 請注意

- Withdrawal of accrued benefits out of a 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 scheme or consult the relevant approved trustee for details. 若從保證基金提取累算權益，可能導致計劃成員不符合部分或所有保證條件，以致影響其享有保證的資格。詳情請查閱計劃的要約文件或向有關的核准受託人查詢。
- For payment by instalment, subject to meeting the guarantee condition of a guaranteed fund, in the case where a guarantee is available, the actual amount paid out may be higher than the amount specified in the Form as a result of the guarantee payment. 就以分期方式支付款項而言，如你已符合保證基金的條件並已獲得保證，實際獲支付款項可能會因保證付款而高於你在相關申索表格上所填寫的金額。
- For the last payment by instalment, the actual amount paid out may be higher or lower than the specified withdrawal amount in the Form. The account without account balance after completion of the last withdrawal request shall be closed except there is any subsequent contributions or transfer-in benefits to your account before the termination is completed. 就最後一期的分期方式支付款項而言，實際支付權益可能高於或低於表格上註明的提取金額。因帳戶於完成此提取要求後已沒有結餘，你的帳戶將會被取消。除非你的帳戶於取消前仍有任何供款或權益轉移至帳戶內。
- The price of fund units may change due to market fluctuations and may go down as well as up. The price of fund units on the date when you submit a claim form to the approved trustee may be different from that on the date when the fund units are redeemed. 基金單位價格會因市場波動而出現變化，單位價格可跌亦可升。你向核准受託人提交申索表格當日的基金單位價格，或會與贖回基金單位當日的價格有所不同。
- If your accrued benefits are currently invested according to the default investment strategy ("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 investments in the DIS and your claim for payment of accrued benefits take place at around the same time, the approved trustee of the scheme shall sequence the de-risking and the claim in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the approved trustee of the scheme if you wish to know the details of how it will handle these transactions. 如現時你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你的投資風險的時間，與接獲你的申索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申索權益的次序。如欲瞭解計劃核准受託人如何處理該等交易，請向受託人查詢詳情。
- If accrued benefits are not withdrawn in full, the remaining accrued benefits will continue to be invested. Investment involves risk and the price of fund units may go down as well as up. Past performance does not indicate future performance. In addition, where any accrued benefits continue to be invested in a guaranteed fund, the guarantee may cease to apply to any such accrued benefits. Please consult the relevant approved trustee for details. You should carefully consider factors such as your investment objectives, financial situation, risk tolerance level and key features (e.g. types and levels of risks, types and levels of fees and charges) of the registered scheme(s) and the constituent fund(s) concerned. Please refer to the Authority's publications available on the Authority's website (www.mpf.org.hk). 如累算權益並非整筆提取，計劃成員帳戶內餘下的累算權益將繼續進行投資。投資涉及風險，基金單位價格可跌亦可升。過往表現並非未來表現的指標。此外，若餘下的累算權益繼續投資保證基金，其享有的保證或不再適用。詳情請向有關核准受託人查詢。請詳細考慮你的投資目標、財政狀況、風險承受能力及有關的註冊計劃及成分基金的主要特點（例如風險種類及水平，及收費種類及水平）。如欲瞭解詳情，可於管理局的網站 (www.mpf.org.hk) 參閱管理局印製的資訊刊物。
- If there is a switching / redemption in progress, withdrawal request will be processed after the switching / redemption has been completed. 如投資轉換/基金贖回正在處理中，提取指示會於投資轉換/基金贖回完成後才處理。

Enquiries

查詢

- (G) Please contact the relevant approved trustee for enquiries about account details and information on specific registered schemes or funds. 如欲查詢帳戶詳情及個別註冊計劃或基金的資料，請聯絡有關的核准受託人。
- (H) For general enquiries regarding a claim for payment of accrued benefits, please contact the relevant approved trustee or the Authority (hotline: 2918 0102 or email: mpfa@mpfa.org.hk). 有關申索累算權益的一般查詢，請聯絡有關的核准受託人或管理局（熱線電話：2918 0102；電郵地址：mpfa@mpfa.org.hk）。

Section I – Details Of The Claimant^{Note 1} / Scheme Member
第 I 部 – 申索人^{註1} / 計劃成員資料

Please use BLOCK LETTER to complete this Form and tick (✓) the appropriate box
請用正楷填寫此表格及在適當方格加上 (✓) 號

1) Claimant details 申索人資料

Surname & Given Name (English)^{Note 2} Chinese Name^{Note 2}
姓氏及名字 (英文)^{註2} 中文姓名^{註2}
(same as that shown on your HKID Card/Passport 須與香港身份證/護照上相同)

HKID / Passport ** No. Fax No.
香港身份證 / 護照 ** 號碼 傳真號碼

Contact Tel. No. Home Mobile
聯絡電話號碼 住宅 手提電話

Correspondence Address[^] 通訊地址[^]

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

2) Scheme member (if different from the claimant) 計劃成員 (如與申索人不同)

Surname (English)^{Note 2} Given Name (English)^{Note 2}
姓氏 (英文)^{註2} 名字 (英文)^{註2}
(same as that shown on your HKID Card/Passport 須與香港身份證/護照上相同)

HKID / Passport ** No. Chinese Name^{Note 2}
香港身份證 / 護照 ** 號碼 中文姓名^{註2}
(same as that shown on your HKID Card/Passport 須與香港身份證/護照上相同)

3) Special Needs Assessment Questionnaire 特別需要評估調查問卷

- What is your highest attained education level?
你的最高學歷水平是?
A. Primary Level or below 小學或以下
B. Secondary Level 中學水平
C. Bachelor Degree 大學學士
D. Master Degree or above 碩士或以上
- Do you have any difficulty that will affect your ability to make any MPF related key decision?
你有否任何困難, 以致影響你在作出強積金相關重要決定時的能力?
A. Yes 有
B. No, I fully understand the meaning or effect of the contents of the Explanatory Memorandum or any addendum thereto. I am able to make any MPF related key decision.
沒有, 我完全理解說明書和所有補充修訂的內容和含義。我有能力作出強積金相關重要決定。

If Box A is ticked for any of the above questions, a confirmation call will be conducted within two working days upon receipt of the application.
如上述問題之一的選項為A, 我們將於申請後的兩個工作日內致電閣下作確認。

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

Passport No. ONLY for scheme member without HKID Card. 護照號碼僅供沒有香港身份證的人士填寫。

[^] Please note that the cheque and the member benefit payment statement will be sent to the correspondence address specified in Part I. 請注意閣下之支票及成員支付權益報表, 將寄往列明於第一部份之通訊地址。



Section II – Details Of The Claim

第 II 部 – 申索資料

1) Account information 帳戶資料

Name of the scheme 計劃名稱: Sun Life MPF Basic Scheme 永明強積金基本計劃
 Sun Life MPF Comprehensive Scheme 永明強積金綜合計劃

Name of the trustee 受託人名稱: Sun Life Pension Trust Limited 永明退休金信託有限公司

- All accounts under the Scheme 計劃內所有帳戶
 Selected account(s) under the Scheme 計劃內的指明帳戶

Account number(s) ^{Note 3} 帳戶號碼 ^{註3}:

1. _____
 2. _____
 3. _____

2) Ground for claiming accrued benefits and the required documents ^{Note 4, 5} 申索累算權益的理由及所需文件 ^{註4,5}

- I have previously withdrawn the benefits by instalments on the below ground from all the accounts specified in Section II(1), therefore, I **DO NOT** provide the required documents for this claim again.

本人之前曾基於下述理由從第 II(1)部指明的所有帳戶分期提取權益，因此無須就是次申索再次提供所需文件。

Ground 理由	Required documents 所需文件
<input type="checkbox"/> Attaining the retirement age of 65 已達到 65 歲退休年齡	Member's HKID card copy ^{Note 6} 成員香港身份證副本 ^{註6}
<input type="checkbox"/> Early Retirement (aged 60) 提早退休(達到 60 歲)	Member's HKID card copy ^{Note 6} , and 成員香港身份證副本 ^{註6} ; 及 the original statutory declaration form on early retirement (Form MPF(S) – W(SD1)) ^{Note 7} 有關提早退休的法定聲明表格 (第 MPF(S) – W(SD1)號表格) ^{註7} 正本

For a scheme member whose HKID card does not contain the month and/ or day of birth, evidence showing the scheme member's date of birth ^{Note 8} :

如計劃成員的香港身份證並未載有出生月份/或日子，請提供載有該計劃成員出生日期的證明 ^{註8} :

- a copy of the scheme member's passport or other travel document showing the month and/or day of birth; or
載有計劃成員出生月份及/或日子的護照或其他旅遊證件的副本；或
- a copy of the scheme member's HKID card with the day and month of the issue date of the HKID card circled or by other means to indicate that the scheme member wishes to use the day and month of the issue date of the HKID card as the day and month of birth; or
在計劃成員的香港身份證副本上圈出（或以其他方式顯示）該身份證的簽發日期的月份及日子，以表示計劃成員擬採用其香港身份證的簽發日期的月份及日子作為其出生月份及日子；或
- the original statutory declaration of the scheme member's date of birth ^{Note 7}
有關計劃成員出生日期的法定聲明 ^{註7} 正本

3) Amount of accrued benefits to be withdrawn from each account specified in Section II(1) ^{Note 9, 10}

擬從第 II 部(1)指明的每個帳戶提取的累算權益金額 ^{註9,10}

- A lump sum ^{Note 11} 整筆 ^{註11} **OR 或** Specify withdrawal amount ^{Note 12} 註明提取金額 ^{註12} HK 港元 \$ _____

Section III – Authorization & Declaration

第 III 部 – 授權及聲明

1) Termination of MPF Account with no residual balance (if applicable) 終止沒有剩餘款項的強積金帳戶 (如適用)

I / We* ^{Note 1} hereby authorize the approved trustee to terminate the relevant registered scheme member account(s) as referred to in Section II(1) upon
本人 / 我們* ^{註1} 謹此授權核准受託人在以下情況終止在第(II)部(1)所述的註冊計劃成員帳戶：

- (i) withdrawal of the full amount of accrued benefits with no residual balance in the said account(s);
該帳戶內的累算權益已被全數提取，並無剩餘款項；
- (ii) (for employee contribution account only) termination of the employment in relation to the contribution account; or
(只適用於僱員供款帳戶) 該供款帳戶所涉及的受僱已經終止；或
- (iii) (for self-employed person contribution account only) cessation of the self-employment, with effect from _____ (DD/MM/YYYY).
(只適用於自僱人士供款帳戶) 終止自僱，生效日期為_____ (日/月/年)。

2) Declaration 聲明

Signature of Claimant (s) / Scheme member

申索人 / 計劃成員簽署

I / We* ^{Note 1} hereby declare that to the best of my / our* knowledge and belief, the information given in this Form and its attachments is correct and complete*
本人 / 我們* ^{註1} 聲明，盡本人 / 我們* 所知所信，本表格及隨附文件所提供的資料均屬正確無訛且並無缺漏。*

Date 日期 (dd 日 / mm 月 / yyyy 年) _____

* **Warning:** Under section 43E of the Ordinance, a person who, in any document given to the Authority or an approved trustee, knowingly or recklessly makes a statement which is false or misleading in a material respect commits an offence and is liable to a maximum penalty of a \$100,000 fine and 1 year's imprisonment on the first conviction and a \$200,000 fine and 2 years' imprisonment on each subsequent conviction. A person who knowingly or willfully makes a statutory declaration false in a material particular also commits an offence under section 36 of the Crimes Ordinance (Cap. 200) and is liable on conviction to imprisonment for 2 years and to a fine.

* **注意：**根據《條例》第 43E 條，任何人在給予管理局或核准受託人的任何文件中，明知或罔顧後果地作出在要項上屬虛假或具誤導性的陳述，即屬犯罪。首次定罪者，最高可處罰款\$100,000 及監禁一年；其後每次定罪，最高可處罰款\$200,000 及監禁兩年。根據《刑事罪行條例》(第 200 章)第 36 條，任何人明知或故意在法定聲明中作出在要項上屬虛假的陳述，亦屬犯罪。一經定罪，可處監禁兩年及罰款。

Internal Use		
Confirmation Call Required: (Y / N)		
Date and Time of Confirmation Call 1	Handled by	Result
Date and Time of Confirmation Call 2	Handled by	Result
Date and Time of Confirmation Call 3	Handled by	Result
Issue Date of Follow Up Letter	Handled by	Reviewed by

Sun Life Pension Trust Limited 永明退休金信託有限公司

Sun Life MPF Basic / Comprehensive Scheme, The Administrator, BestServe Financial Limited

10/F, One Harbourfront, 18 Tak Fung Street, Hungghom, Kowloon, Hong Kong

Tel 3183 1900 Fax 3183 1901

永明強積金基本 / 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 10 樓

電話 3183 1900 傳真 3183 1901

**Explanatory Notes on
Claim Form for Payment of Accrued Benefits on Ground of Attaining the Retirement Age of 65 or Early Retirement
(Form MPF(S) – W(R))**

**基於已達到65歲退休年齡或提早退休的理由而申索累算權益的表格
(第MPF(S) – W(R)號表格) 填報須知**

- (1) Either the scheme member or person(s) appointed as a committee of estate of a mentally incapacitated person under the Mental Health Ordinance (Cap.136) ("the committee of the estate") to act on behalf of the scheme member can be the claimant to lodge the claim for payment of accrued benefits. If there is more than one person appointed by the court as the committee of the estate, those persons should apply and sign in the capacity as the committee of the estate in accordance with those terms of appointment and any other requirements contained in the relevant court order. Please use an additional blank sheet to provide details of the claimants under Section I. Under such circumstances, this Form needs to be signed by all of the persons appointed by the court as the committee of the estate, unless the Court authorizes otherwise.
要求支付累算權益的申索，可由計劃成員或根據《精神健康條例》(第136章)獲委任代表精神上無行為能力的計劃成員行事的產業受託監管人(「產業受託監管人」)作為申索人提出。如法庭委任超過一人為產業受託監管人，該等人士應按照委任條款及有關法庭命令所載的任何其他規定，以產業受託監管人的身份提出申請及在相關文件簽署。請就第I部另紙詳載各申索人的資料。在此情況下，除非法庭另有授權，否則本表格須由所有獲法庭委任為該計劃成員的產業受託監管人的人士簽署。
- (2) If a claimants / scheme member does NOT possess a HKID Card, please fill in the name as shown on the passport.
如申索人/計劃成員沒有香港身份證，請填上護照上的姓名。
- (3) Scheme member account number can be found:
計劃成員帳戶號碼可循以下途徑查閱/查詢：
(i) in the membership certificate, notice of acceptance, or notice of participation; or
查閱成員證明書、接納通知或參與通知；或
(ii) in the annual benefit statement, or other statements provided by the approved trustee; or
查閱周年權益報表或核准受託人提供的其他報表；或
(iii) through the member enquiry facilities available from the approved trustee.
核准受託人為成員提供的諮詢服務。
If you are in doubt, please contact the approved trustee of the registered scheme concerned.
如有疑問，請聯絡有關註冊計劃的核准受託人。
- (4) In processing a claim for payment, the approved trustee of the registered scheme concerned may request the claimant to produce the original documents for checking purpose, if necessary.
如有需要，有關註冊計劃的核准受託人在處理付款申索時可能要求申索人提交文件的正本，以核對資料。
- (5) For a claim made by the committee of the estate on behalf of the scheme member, in addition to the required documents in respect of the scheme member, the following documents should be enclosed:
由產業受託監管人代表計劃成員提出的申索，除須提供有關該計劃成員的所需文件外，亦應夾附以下文件：
(i) a copy of the evidence of the status of the committee of the estate, i.e. the court order;
產業受託監管人身份的證明文件副本，即法庭命令的副本；
(ii) a copy of each claimants HKID card for verification of the name and identity card number of the claimant if the claimant does not wish to present the card in person for verification^{Note 6}; and
每名申索人的香港身份證副本，以供核對其姓名及身份證號碼(如不擬親身出示申索人的香港身份證供核對有關資料)^{註6}；及
(iii) the original statutory declaration form made by the committee of the estate for a claim for payment of accrued benefits (Form MPF(S) – W(SD4))^{Note 7} (if applicable). Where such a statutory declaration has been made and enclosed with the claim, the statutory declaration form (MPF(S) – W(SD1)) for a claim made on the ground of early retirement shall not be required.
產業受託監管人就申索累算權益所作的法定聲明表格(第MPF(S)-W(SD4)號表格)^{註7}正本(如適用)。如使用該表格作出聲明並把該表格夾附於本申索，便無須提交基於提早退休的理由作出申索的法定聲明表格(即第MPF(S)-W(SD1)號表格)。
- (6) For a claimant / scheme member who does NOT possess a HKID card, a copy of the passport (only pages with personal particulars and passport number) should be provided to the approved trustee concerned for verification of the name and passport number of the claimant/ scheme member if the claimant / scheme member does not wish to present the passport in person for verification.
如申索人/計劃成員沒有香港身份證，而又不擬親身出示護照以供核對資料，則須提供護照副本(只須提供載有個人資料及護照號碼之頁)，以供有關核准受託人核對申索人/計劃成員的姓名及護照號碼。
- (7) The statutory declaration must be valid statutory declaration in the place where the declaration is made (e.g. in Hong Kong, the statutory declaration should be made before and signed by a Commissioner for Oaths (e.g. at a Public Enquiry Service Centre of the Home Affairs Department) or a Notary Public or a Justice of the Peace). A statutory declaration made in a place other than Hong Kong is also acceptable provided that it is made before and signed by a Notary Public or a person authorized under the law of that place to administer an oath or take a statutory declaration.
法定聲明必須是一份屬該聲明宣誓所在地有效的法定聲明(例如在香港，法定聲明須在監督員(例如在民政事務總署諮詢服務中心)或公證人或太平紳士面前作出，並由他們簽署)。在香港以外地方所作的法定聲明，只要是在公證人或獲該地方法律授權宣誓或監理法定聲明的人士面前作出，並由他們簽署，亦可予接受。
- (8) A scheme member who does not have the month and/or day of birth printed on the HKID card may provide evidence as to the month and/or day by using one of the following methods:
如計劃成員的香港身份證並未印有出生月份及/或日子，則可採用以下其中一種方法，就其出生月份及/或日子提供證據：
(i) using the birth date as shown on an official document (e.g. a travel document or a statutory declaration of the scheme member's date of birth); or
採用某份官方文件(例如旅遊證件或有關計劃成員的出生日期的法定聲明)所載的出生日期；或
(ii) using the day and month of the issue date of the HKID card of the scheme member.
採用計劃成員香港身份證上的簽發日期的日子及月份。
If the scheme member has not used any of the methods above to provide evidence as to the month and day, then in the absence of the above evidence, the approved trustee will:
如計劃成員沒有採用以上任何一種方法就其出生月份及日子提供證據，則核准受託人在沒有上述證據的情況下，會以下述日子作為該計劃成員的出生日期：
(i) where the HKID card shows only the year and month of birth (and not the day of birth), use the last day of the month as shown on the HKID card as the birth date of the scheme member; and
計劃成員的香港身份證所載出生月份的最後一日(如該香港身份證只載有出生年份及月份，而沒有出生日子)，作為其出生日期；或
(ii) where the HKID card shows only the year of birth (and neither the month nor day of birth), use the last day of the year as shown on the HKID card as the birth date of the scheme member.
計劃成員的香港身份證所載的出生年份的最後一日(如該香港身份證只載有出生年份，而沒有出生月份及日子)，作為其出生日期。
Please note that mandatory contributions in respect of the scheme member (if any) will cease on the day when the scheme member reaches age 65 based on the evidence provided by the scheme member or defaulted above.
請注意，就計劃成員作出的強制性供款(如有)，將根據計劃成員提供的證據，或按上述預設的出生日期計算，於計劃成員年滿65歲當日終止。
- (9) If a claimant wishes to select different withdrawal amounts for different accounts within a registered scheme, the claimant should fill in a separate form for each account.
如申索人擬就同一個註冊計劃內的不同帳戶選擇不同的提取金額，須就每個帳戶分別填寫一份表格。

- (10) No fees or financial penalties may be charged to or imposed on a scheme member or deducted from the scheme member account, other than necessary transaction costs incurred or reasonably likely to be incurred in selling or buying investments in order to give effect to the withdrawal and are payable to a party other than the approved trustee, for payment of the member's accrued benefits in a lump sum or for the first 4 withdrawals by instalments each year. Payments in excess of 4 times in a calendar year may be subject to fees or financial penalties. Please consult the approved trustee of the registered scheme concerned as on the arrangement and fees involved.
- 核准受託人不得就向計劃成員整筆支付或每年首 4 次向計劃成員分期支付累算權益而向該計劃成員收取費用或施加罰款，或從該計劃成員的帳戶扣除費用或罰款，但為執行該項權益提取而進行買賣投資所招致，或是合理地相當可能招致，並須向某方（該核准受託人除外）支付的必需交易費用除外。如向計劃成員支付權益的次數多於每公曆年 4 次，核准受託人可向計劃成員收取費用或施加罰款。有關支付權益的安排及所涉及的費用，請向有關註冊計劃的核准受託人查詢。
- (11) This option is applicable for withdrawing the accrued benefits in a LUMP SUM from each scheme member account specified in Section II(1) (including benefits derived from voluntary contributions if the scheme member is entitled to withdraw them based on the governing rules of the registered scheme concerned). Please consult the approved trustee of the registered scheme concerned for details.
- 此提取方式適用於從第 II(1)部指明的每個計劃成員帳戶內提取整筆累算權益（如根據有關註冊計劃的管限規則，計劃成員有權提取由自願性供款所產生的累算權益，則包括該等權益）。詳情請向有關註冊計劃的核准受託人查詢。
- (12) This option is applicable for withdrawing the accrued benefits by INSTALMENTS from each scheme member account specified in Section II(1). For each scheme member account, the specified withdrawal amount will be redeemed proportionally from each sub-account according to the fund allocation as of the day on which the approved trustee redeems the benefits (including benefits derived from voluntary contributions if the scheme member is entitled to withdraw them based on the governing rules of the registered scheme concerned). If the account balance is less than the withdrawal amount specified by the claimant, the entire account balance will be withdrawn. If the claimant subsequently wishes to withdraw the remaining benefits in the accounts, please submit another claim to the approved trustee of the registered scheme concerned.
- 此提取方式適用於從第 II(1)部指明的每個計劃成員帳戶內分期提取累算權益。就每個計劃成員帳戶，核准受託人會根據贖回權益當日的資金分配，按比例從每個分帳戶中贖回註明的提取金額（如根據有關註冊計劃的管限規則，計劃成員有權提取由自願性供款所產生的累算權益，則包括該等權益）。如帳戶結餘少於申索人註明的提取金額，則帳戶內的結餘將會被全數提取。如申索人其後擬提取帳戶內餘下的權益，請向有關註冊計劃的核准受託人另行提出申索。