

如需遞交填妥表格 When submitting this form:  
請緊記簽署作實 Please ensure that you have signed where necessary.  
請勿遞交相同表格 Please do NOT send duplicate copies.



## 永明彩虹強積金計劃 – 自僱人士資料更改表格 SUN LIFE RAINBOW MPF SCHEME – SELF-EMPLOYED PERSON INFORMATION CHANGE FORM

本表格所列之更改將取代所有其他之前已遞交行政管理人的資料/表格。所有部分須以英文正楷填寫。  
The changes filled in this form will supersede any previous information/form(s) which has/have submitted to the Administrator. All sections below should be completed in English and in BLOCK letters.

### 第一部分 Section I 自僱人士資料 SELF-EMPLOYED PERSONAL DETAILS

自僱人士姓名 Self-employed Person Name \_\_\_\_\_ 僱主編號 Employer No. \_\_\_\_\_  
電話號碼 Telephone No. \_\_\_\_\_ 香港身份證/護照號碼\* HKID Card/Passport No.\* \_\_\_\_\_

### 第二部分 Section II 修改細則 (只需填上適用部分) CHANGE DETAILS (ONLY COMPLETE RELEVANT SECTIONS)

請在適當方格加上剔號 (✓)。 Please check (✓) the appropriate box(es).

#### Part A: 更改公司資料<sup>1</sup> Change of Company Information<sup>1</sup>

增加新公司資料 Add new company information  
 更改現有公司資料 Change existing company information  
 刪除現有公司資料 Remove existing company information

公司名稱 Company Name \_\_\_\_\_  
職業 Occupation \_\_\_\_\_ 商業登記證號碼 Business Registration No. \_\_\_\_\_

#### Part B: 更改聯絡資料 Change of Contact

生效日期 Effective Date \_\_\_\_\_ (日/月/年 DD/MM/YYYY)

新住址(郵政信箱恕不受理)  
New Residential Address (P.O. Box will NOT be accepted) \_\_\_\_\_

新通訊地址(如與住址不同)  
New Correspondence Address (if different from the residential address) \_\_\_\_\_

新電話號碼 New Telephone Nos. 住宅 Home \_\_\_\_\_ 手提電話 Mobile \_\_\_\_\_ 傳真號碼 Fax No. \_\_\_\_\_

新電郵地址 New Email Address \_\_\_\_\_

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

新語言選擇為:  中文 Chinese  英文 English

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

本服務由2013年10月開始, 每個季度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:  
Effective from October 2013, members can receive 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. 短訊以表格第二部分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發出。如閣下之手提電話號碼並沒有在第二部分更新, 短訊將根據閣下現時登記的有效手提電話號碼發出。SMS is sent out by using valid mobile number provided in Section II of this form or the latest updated valid mobile number. If you do not update the mobile phone number in Section II, the SMS will be sent out by using current registered mobile phone number.
4. 如成員持有多過一個帳戶, 短訊會根據最後成立帳戶紀錄的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二部分更新之語言選擇。如在第二部分的有關資料並沒有更新, 則會根據閣下現時選擇。SMS language will follow the language selection stated in Section II of this form. If there is no update on relevant information in Section II, current selection in this account will be followed.

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.

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



**Part D: 電子版本半年度成員權益報告之安排 Arrangement for Electronic Version of Semi-annual Member Benefit Statement**

本人欲只收取電子版本之半年度成員權益報告並同意不以郵寄方式收取該報告。I wish to receive the electronic version of Semi-annual Member Benefit Statement only and agree not to receive the statement by mail.

本人不欲收取電子版本之半年度成員權益報告及明白該報告將會郵遞至本人於本計劃記錄之通訊地址。I do not wish to receive the electronic version of Semi-annual Member Benefit Statement and understand that the statement will be mailed to my correspondence address as per the scheme record.

**Part E: 更改姓名或簽署式樣<sup>2</sup> Change of Name or Signature Specimen<sup>2</sup>**

生效日期 Effective Date         (日/月/年 DD/MM/YYYY)

姓 (英文 English) 名  
Surname Given Name  
(須與香港身份證 / 護照上相同 same as HKID Card/Passport)

姓 (中文 Chinese) 名 稱謂 先生/太太/小姐/其他\*  
Surname Given Name Title Mr/Mrs/Ms/Other\*  
(須與香港身份證 / 護照上相同 same as HKID Card/Passport)

新簽署式樣:  
New Signature Specimen:



**Part F: 更改參與計劃日期 Change of Participation Date to the Plan**         (日/月/年 DD/MM/YYYY)

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

**備註 Notes:**

1 請提供新的商業登記之副本以更改以上資料。

Please attach copy of the new Business Registration Certificate for the above changes.

2 若需要更改登記於計劃內的姓名，你需要附上結婚證書及新身份證之副本或附上改名契及新身份證之副本。閣下的現有成員簽署式樣(後頁)須與行政管理人記錄相符，以上之新簽署式樣方可生效。

For change of name to be registered in our records you must attach a copy of the Marriage Certificate and your new Hong Kong Identity Card or a copy of the Deed Poll and your new Hong Kong Identity Card. The above New Signature Specimen will be effective provided that your existing signature specimen (next page) is consistent with the Administrator's record.

以下之修改須於最少一個月前通知行政管理人。At least 1-month prior notice to the Administrator is required for the following changes.

**Part G: 強制性供款款額 Mandatory Contribution Amount**

如更改強制性供款款額，請填妥自僱人士年度聲明。

Please complete the Annual Declaration of Self-employed Person if the Mandatory Contribution Amount is needed to change.

**Part H: 更改供款模式 Change of Contribution Mode**

供款模式將適用於強制性供款及自願性供款(如適用) Contribution Mode will be applied to Mandatory Contribution and Voluntary Contribution (if applicable)

生效日期 Effective Date         (日/月/年 DD/MM/YYYY)

每月 Monthly 供款期將為每一曆月之首日至每一曆月之最後日<“供款到期日”>  
Contribution period will be from the first day of each calendar month to the last day <“Contribution Due Date”> of each calendar month

每年 Annually 供款期將為每一年 1 月 1 日至 12 月 31 日<“供款到期日”>  
Contribution period will be from the 1st January to 31st December <“Contribution Due Date”> of each year

**Part I: 更改自願性供款詳情 Change of Voluntary Contribution Details**

更改自願性供款開始日期 Change the Commencement Date of Voluntary Contribution         (日/月/年 DD/MM/YYYY)

由以下生效日期開始，自願性供款將按照以下安排。I would like to make the following arrangement for my voluntary contributions with effect from the following Effective Date.

生效日期 Effective Date         (日/月/年 DD/MM/YYYY)

(i) 自願性供款額<sup>3</sup> Commence regular Voluntary Contribution<sup>3</sup>

每一供款期之固定金額 Fixed amount for each contribution period 港元 HK\$ \_\_\_\_\_ 或 OR

以強制性供款有關入息之百分比 Percentage of MPF Relevant Income \_\_\_\_\_ %

(ii) 更改自願性供款額<sup>3</sup> Change regular Voluntary Contribution<sup>3</sup>

每一供款期之固定金額 Fixed amount for each contribution period 港元 HK\$ \_\_\_\_\_ 或 OR

以強制性供款有關入息之百分比 Percentage of MPF Relevant Income \_\_\_\_\_ %

(iii)  一筆過自願性供款額<sup>3</sup> Make lump sum voluntary contribution of<sup>3</sup> 港元 HK\$ \_\_\_\_\_

(iv)  終止自願性供款 Cease Voluntary Contribution

**Part J: 更改供款方法 Change of Contribution Payment Method**

直接付款 Direct Debit  
(若閣下以往未曾遞交有關授權書，請另行填寫直接付款授權書。Please complete Direct Debit Authorization Form if you have not provided it previously.)

支票付款 Payment by cheque  
(支票抬頭人為「永明信託有限公司－強積金」  
The cheque should be made payable to “Sun Life Trustee Company Limited – MPF”)

### 第三部分 Section III 個人資料收集聲明 PERSONAL INFORMATION COLLECTION STATEMENT

本人/吾等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) 處理本人/吾等的此項申請及任何其他申請; (ii) 為本人/吾等參與本計劃; (iii) 管理本人/吾等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) 為本人/吾等甄選及參與獎賞、忠實或特選客戶計劃; (vii) 因上述目的與本人/吾等聯絡; (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。

受託人亦可使用本人/吾等的聯絡資料, 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本人/吾等。除非得到本人/吾等之同意(包括表示不反對), 否則受託人不可使用本人/吾等之資料為該用途。若本人/吾等不同意接受此等推廣資訊, 可於下列方格內填上剔號。

受託人可為以上目的披露本人/吾等的個人資料予 (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) 本人/吾等的銀行作繳款用途; (c) 本人/吾等的保險經紀(如有); (d) 本人/吾等的強積金中介人; (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; 及(g) 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本人/吾等的同意後披露或將本人/吾等的個人資料作其他用途。

本人/吾等明白本人/吾等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本人/吾等的申請。本人/吾等有權查閱及要求更正受託人持有有關本人/吾等的個人資料, 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。

若閣下不同意收取由受託人發出的推廣資訊, 請於方格內填上剔號。

I/We understand and consent 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 I/we make; (ii) enrolling me/us in the Scheme; (iii) administering and managing my / our 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 me/us; (vii) contacting me/us 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 my/our contact details, demographic information, investment choices and accrued benefits to contact me/us 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 my/our data unless the Trustee have received my/our consent (which includes an indication of no objection). Tick the box below if I/we do not consent to receive such marketing information.

The Trustee may disclose my/our 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 my/our bank for payment purposes; (c) to my/our insurance broker (if any); (d) to my 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 it's 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 and (g) as otherwise required or permitted by law.

The Trustee may also use and disclose my/our personal data in other ways with my/our consent or as otherwise required or permitted by law.

I/We understand that the information I/we give is voluntary, but failure to provide the requested personal data may mean the Trustee is unable to process my/our application. I/We have the right to seek access to and request correction of any personal data the Trustee holds about me/us 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.

Please tick if you do not wish to receive marketing information from the Trustee.

### 第四部分 Section IV 聲明 DECLARATION

本人(作為自僱人士身份), 謹此確定以上細則 / 或附上之資料(如有)皆為真實正確。

I, the Self-employed Person, hereby confirm that the above details and the attached information (if any) are true and correct.

自僱人士簽署:  
Signature of Self-employed Person:

請簽署 Please sign here **X**

日期 Date :

#### 備註 Notes:

3 如閣下已填寫以上選擇(i)、(ii) 或(iii), 請遞交投資轉換/更改投資授權表格, 否則(i)若閣下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永明MPF首域平穩基金; 或(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。

Please submit Switching / Change of Investment Mandate Form if you have selected above option (i),(ii) or (iii). Otherwise, (i) if no Investment Allocation for Voluntary Contributions has been made by you, the Trustee shall invest those voluntary contributions in Sun Life MPF First State Stable Income Fund; or (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.

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  
香港九龍紅磡德豐街 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, Hunghom, Kowloon, Hong Kong Tel 3183 1888 Fax 3183 1889