

## Claim Form For Payment Of MPF Accrued Benefits (“Benefits”) On Grounds Of Attaining The Retirement Age Of 65 Or Early Retirement

### 基於已達到65歲退休年齡或提早退休的理由而申索強積金累算權益（「權益」）的表格

Please read the following **important notes** before completing this Form.  
填寫本表格前，請先閱讀下列**重要資料**：

#### 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 benefits from an MPF registered scheme (“scheme”) on the grounds of attaining the retirement age of 65 or early retirement only. For a claim made on the grounds of early retirement, the scheme member must reach the age of 60 and have permanently ceased all employment and self-employment with no intention of becoming employed or self-employed again. For a claim for payment of 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，要求從一個強積金註冊計劃（「計劃」）提取權益的人士填報。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權益，請填寫第MPF(S) – W(O)號表格。
- (b) If the claimant/scheme member wishes to withdraw benefits from more than one scheme, please fill in a separate form for each scheme.  
如申索人/計劃成員擬從多於一個計劃提取權益，須就每個計劃填寫一份表格。
- (c) Please submit the completed form and the required supporting documents to “**Provident Funds Services, Manulife (International) Limited, 21/F., Tower A, Manulife Financial Centre, 223-231 Wai Yip Street, Kwun Tong, Kowloon, Hong Kong**” for processing the claim. If any information provided is incorrect or incomplete, the relevant trustee may not be able to process your request.  
請把填妥的表格及所需證明文件寄交「**香港九龍觀塘偉業街223-231號宏利金融中心A座21樓宏利人壽保險（國際）有限公司公積金服務部**」，以便處理有關申索。若提供的任何資料不正確或不完整，有關受託人可能無法處理您的申請。
- (d) Please read the “Explanatory Notes” carefully before completing this Form.  
填寫本表格前，請先細讀「註釋」。
- (e) The information collected from you and in respect of you in support of this claim for payment of benefits can be used by Manulife, relevant trustee(s), service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority (“MPFA”) in activities relating to the processing of your claim. The information may be transferred to other division(s) within Manulife, the relevant trustee(s), government or regulatory bodies including the MPFA or other parties including delegates, intermediaries or any service providers of Manulife or the relevant trustees, for such purpose(s) or for a purpose directly related to such purpose(s). All data processes may involve a transfer of information to places either within or outside the Hong Kong Special Administrative Region.  
宏利、有關受託人、有關服務提供者及政府機構或監管機構，包括強制性公積金計劃管理局（簡稱「積金局」）可使用從您收集及關於您的資料以處理您在本表格內要求的申索事宜。為達致該等目的，或直接與該等目的有關的目的，所提供的資料可移轉予宏利內其他部門、有關受託人、政府機構或監管機構，包括積金局，或其他人士/團體，包括宏利或有關受託人的受委託者、強積金中介人或任何服務提供者。所有資料處理過程或會涉及資料移轉至香港特別行政區或以外地區。
- (f) The MPFA and other regulatory bodies in any jurisdiction shall be authorized to inspect any information under the scheme.  
積金局及任何司法管轄區的其他監管團體將獲授權查看計劃內的任何資料。
- (g) By writing to the Privacy Officer of your scheme administrator, you can correct and have access to your personal data.  
您可以書面向計劃管理人之個人資料主任更改及查閱您的個人資料。
- (h) All information may be treated by Manulife in the same manner as mentioned in the “Notice to Customers relating to the Personal Data (Privacy) Ordinance” (“Notice”). In case you have not read the Notice before, you can obtain such Notice through Manulife's website at [www.manulife.com.hk](http://www.manulife.com.hk).  
宏利可按於《有關〈個人資料（私隱）條例〉的客戶通知》（「通知」）所述，處理有關資料。假如您未有細閱該通知，您可透過宏利網址[www.manulife.com.hk](http://www.manulife.com.hk)取得該通知。

#### Reminder Before Submitting a Claim 提交申索前須注意的事項

- (i) Withdrawal of benefits derived from voluntary contributions paid pursuant to section 11 of the Ordinance is subject to the governing rules of the scheme concerned. Please check the information from the MPF Scheme Brochure of the Manulife Global Select (MPF) Scheme (“Scheme”) at [www.manulife.com.hk](http://www.manulife.com.hk) or contact our Member Hotline on (852) 2108 1388 for details.  
就依據《條例》第11條支付的自願性供款所產生的權益而言，提取權益須受有關計劃的管限規則所規限。詳情請查閱宏利網站[www.manulife.com.hk](http://www.manulife.com.hk)之宏利環球精選（強積金）計劃（「本計劃」）之強積金計劃說明書或聯絡宏利成員熱線（852）2108 1388查詢。
- (j) Withdrawal of benefits derived from tax deductible voluntary contributions paid pursuant to section 11A of the Ordinance is subject to the same withdrawal requirements as for mandatory contributions (except that under section 11A(3), certain provisions relating to offsetting of severance or long service payments, and protection of benefits from creditors and others, do not apply).  
就依據《條例》第11A條存入的可扣稅自願性供款所產生的權益而言，提取權益須受與強制性供款相同的提取規定所規限（惟根據第11A(3)條，若干與抵銷遣散費或長期服務金有關，以及與保障債權人及其他人士的權益有關的條文並不適用）。

#### Factors to Consider before Selecting Withdrawal Option 選擇提取方式前須考慮的因素

- (k) Benefits may be withdrawn on the grounds 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 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 four withdrawals by instalments (or the number of free withdrawals by instalments offered by the scheme) from the same MPF account are made in a calendar year. Please consult the relevant 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權益，可以選擇整筆提取或分期提取。在選擇提取權益的金額及時間時，除了其他因素之外，請細心考慮您的個人需要、風險承受能力及財政狀況，然後才作決定。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四次（或計劃准予免費分期提取的次數），受託人可向該計劃成員收取額外費用或施加罰款。詳情請向有關受託人查詢。

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## Reminder 請注意

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- Withdrawal of 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 MPF Scheme Brochure of the Scheme or contact our Member Hotline for details.  
若從保證基金提取權益，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。詳情請查閱本計劃的強積金計劃說明書或致電宏利成員熱線查詢。
- According to arrangement under the Scheme, members who are investing in the Manulife MPF Stable Fund (the “Stable Fund”) should be aware of the guarantee arrangement for withdrawal of benefits by instalments. The Stable Fund was established to provide members who could meet with certain guarantee conditions on contributions (being qualifying conditions) and grounds of payment (being pre-determined events or terminal illness) with interest guarantee upon a lump sum withdrawal. If members withdraw their benefits by instalments upon reaching the normal retirement age of 65, the guarantee will be determined and provided in the same manner to the members as if they are claiming for payment of benefits in a lump sum when they make their first request of withdrawal by instalments. Please refer to the MPF Scheme Brochure of the Scheme on our website or contact our Member Hotline for the latest guarantee arrangement which shall always prevail.  
根據本計劃的安排，有投資於宏利MPF穩健基金（「穩健基金」）的成員應注意分期形式提取權益下其保證安排。穩健基金的設立是為了向符合供款的某些規定條件和支付理由（預定事件或末期疾病）的條件下之成員，當以整筆支付形式提取權益而提供保證利息。成員可於年屆65歲正常退休年齡時選擇以分期形式提取權益，成員在作出首次分期提取時，保證金額將被釐定，提供方式如同以整筆支付形式提取權益。  
關於基金保證之安排應以記載於本計劃之強積金計劃說明書為準。請瀏覽宏利網站或致電宏利成員熱線查閱有關之最新安排。
- 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 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。您向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 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. When one or more instruction(s) from members, such as subscription, redemption or switching instructions, are also being processed and with units to be issued/redeemed (except for the Interest Fund where investment to be made in or monies to be withdrawn from) on the same dealing day as the dealing day scheduled for the annual de-risking, such instruction(s) and the annual de-risking in respect of such member will take place on the same day. In such case, the annual de-risking will only take place after processing those instruction(s). For details of the DIS, including its automatic de-risking features and fee level, you may refer to the MPF Scheme Brochure of the Scheme or the related information which is available on our website.  
如現時您的權益是按照本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。若一項或多項指示，如認購、贖回或轉換指示，於有關成員的每年降低風險之預定交易日辦理，而在同一交易日發行/贖回有關單位（利息基金則為對其進行投資或從中提取款項），該等指示將與有關成員的每年降低風險安排同日進行。在此情況下，每年降低風險安排僅會在該等指示獲處理後進行。如欲了解預設投資策略詳情，包括其自動降低風險特點及收費水平，您可參考本計劃之強積金計劃說明書或相關資料，有關資訊可見於宏利網頁。
- If benefits are not withdrawn in full, the remaining 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 benefits continue to be invested in a guaranteed fund, the guarantee may cease to apply to any such benefits. Please check the MPF Scheme Brochure of the Scheme or contact our Member Hotline 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 scheme(s) and the constituent fund(s) concerned. Please refer to the MPFA's publications available on the MPFA's website ([www.mpfa.org.hk](http://www.mpfa.org.hk)).  
如權益並非整筆提取，計劃成員帳戶內餘下的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，若餘下的權益繼續投資保證基金，其享有的保證或不再適用。詳情請查閱本計劃的強積金計劃說明書或致電宏利成員熱線查詢。請詳細考慮您的投資目標、財政狀況、風險承受能力及有關的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，可於積金局的網站 ([www.mpfa.org.hk](http://www.mpfa.org.hk)) 參閱積金局印製的資訊刊物。

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## Enquiries 查詢

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- Please contact our Member Hotline on (852) 2108 1388 for enquiries about account details and information on the Scheme or funds. You may also visit our website at [www.manulife.com.hk](http://www.manulife.com.hk) for relevant information.  
如欲查詢帳戶詳情及本計劃或基金的資料，請聯絡宏利成員熱線(852) 2108 1388查詢。您亦可瀏覽宏利網站 [www.manulife.com.hk](http://www.manulife.com.hk) 參閱相關資料。

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## Notes on Payment of Benefit 支付權益備註

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- The benefits will be paid to the claimant by cheque upon receipt of a completed form and the required documents.  
於收齊填妥的表格及所需證明文件後，申索人方獲支付權益。有關權益將以支票形式發還。
- Any outstanding contribution/surcharges in relation to the member's account concerned, if recoverable, will be paid to the claimant as soon as practicable after receiving it.  
如能收回與成員帳戶有關的未清繳供款/附加費，則在接獲該等款項後將在切實可行範圍內盡快付予申索人。

**Section I – Details Of The Scheme Member / Claimant** <sup>Note 1</sup>**第一部份 – 計劃成員 / 申索人<sup>註1</sup>資料**

## (1) Scheme Member Details 計劃成員資料

(i) Name<sup>Note 2</sup> (as shown on your Hong Kong Identity (HKID) Card) 姓名<sup>註2</sup> (與您的香港身份證上的姓名相同)

Surname in English 英文姓氏	Given Name in English 英文名字	Name in Chinese 中文姓名
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(ii) Identification 身份證明

HKID Card Number 香港身份證號碼： ( )	Passport Number 護照號碼： (ONLY for scheme member without HKID Card 本欄僅供沒有香港身份證的計劃成員填寫)
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(iii) Contact Details 聯絡資料

Daytime Phone Number 日間聯絡電話號碼：	Mobile Phone Number 手提電話號碼：	Email Address 電郵地址：
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## (2) Claimant Details 申索人資料 (If different from the scheme member 如與計劃成員不同)

(i) Name<sup>Note 2</sup> (as shown on your Hong Kong Identity (HKID) Card) 姓名<sup>註2</sup> (與您的香港身份證上的姓名相同)

Surname in English 英文姓氏	Given Name in English 英文名字	Name in Chinese 中文姓名
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(ii) Identification 身份證明

HKID Card Number 香港身份證號碼： ( )	Passport Number 護照號碼： (ONLY for person without HKID Card 本欄僅供沒有香港身份證的人士填寫)
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(iii) Contact Details 聯絡資料

Daytime Phone Number 日間聯絡電話號碼：	Mobile Phone Number 手提電話號碼：
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Please complete this section only if 請於下列情況下才填寫此部份：

1. The scheme member's current address is different from the one shown on the latest Member Benefit Statement; or

計劃成員現居地址有別於最近期的成員權益報表上所載的地址；或

2. Claimant is different from the scheme member 申索人與計劃成員不同。

(iv) Correspondence Address 通訊地址

Flat / Room 室	Floor 樓	Block 座	Building 大廈
Estate 屋邨		Street No. 街道號碼	Street 街道
District 地區 / Country 國家名稱 (if not Hong Kong 如非香港地區)			H.K. 香港 / KLN. 九龍 / N.T. 新界 (delete whichever is not applicable 請刪去不適用者)

The below part is for scheme member to tick "✓" only, not suitable for claimant if claimant is other than the holder of this scheme member account.

以下部份只供計劃成員以剔號「✓」指示。如申索人並非此計劃成員帳戶的持有人，則不適用於申索人。

The above address applies to all of the member's products / services in Hong Kong and Macau provided by all companies within the Manulife group of companies and also companies which provide trustee / custodian services to Manulife.

閣下所提供的住址，適用於成員持有，並由宏利集團旗下公司，以及為本公司提供信託 / 託管服務的公司，於香港及澳門所提供的產品 / 服務上。

 To apply the above address to this scheme member account only, please "✓" this box. 如以上地址只適用於此計劃成員帳戶，請在方格內填上「✓」號。**Section II – Details Of The Claim****第二部份 – 申索資料**

## (1) Account Information 帳戶資料 (Please ✓ The Appropriate Box 請在適當的方格內填上 ✓ 號)

Name of Scheme 計劃名稱 : **Manulife Global Select (MPF) Scheme 宏利環球精選 (強積金) 計劃** All accounts under the Scheme 本計劃內所有帳戶 Selected account(s) under the Scheme 本計劃內的指明帳戶 (please specify the scheme member account no.<sup>Note 3</sup> 請註明計劃成員帳戶號碼<sup>註3</sup>)

(1) \_\_\_\_\_ (2) \_\_\_\_\_ (3) \_\_\_\_\_

If you do not tick "✓" the above options or have stated the member account number but without ticking the box, it will be deemed that the request for withdrawal of benefits applies to **ALL** your member account(s)<sup>^</sup>.如沒有以剔號“✓”選擇上列選項或只提供成員帳戶號碼而沒有加上剔號作實，將視作您指示宏利從您的**所有**成員帳戶<sup>^</sup>內提取權益。<sup>^</sup> Member account(s) include(s) account(s) of Tax Deductible Voluntary Contribution account member, self-employed person, employee member and/or personal account member under Manulife Global Select (MPF) Scheme. For withdrawal from the Flexi Retirement Contribution member account, please submit "Request for Withdrawal of Flexi Retirement Contribution".<sup>^</sup> 成員帳戶包括在宏利環球精選 (強積金) 計劃內之可扣稅自願性供款成員帳戶，自僱人士成員帳戶，僱員成員帳戶及/或個人帳戶。有關自選退休供款之成員帳戶之提取，請遞交「提取自選退休供款申請表」。



## Section II – Details Of The Claim

### 第二部份 – 申索資料

#### (2) Grounds For Claiming Benefits And The Required Documents<sup>Notes 4 & 5</sup> (Please ✓ The Appropriate Box) 申索權益的理由及所需文件<sup>註4及註5</sup> (請在適當的方格內填上 ✓ 號)

I have previously withdrawn the benefits by instalments on the below grounds 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)部份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。

Grounds 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	<input type="checkbox"/> a copy of the scheme member's HKID card for verification of the name, date of birth and identity card number of the scheme member if the claimant does not wish to present the card in person for verification <sup>Note 6</sup> 計劃成員的香港身份證副本，以供核對其姓名、出生日期及身份證號碼（如不擬親身出示計劃成員的香港身份證供核對有關資料） <sup>註6</sup>
<input type="checkbox"/> Early retirement 提早退休	<input type="checkbox"/> a copy of the scheme member's HKID card for verification of the name, date of birth and identity card number of the scheme member if the claimant does not wish to present the card in person for verification <sup>Note 6</sup> ; and 計劃成員的香港身份證副本，以供核對其姓名、出生日期及身份證號碼（如不擬親身出示計劃成員的香港身份證供核對有關資料） <sup>註6</sup> ；及 <input type="checkbox"/> the original statutory declaration form on early retirement ("Form MPF(S) - W(SD1)) <sup>Note 7</sup> 有關提早退休的法定聲明表格（第"MPF(S) - W(SD1)"號表格） <sup>註7</sup> 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<sup>Note 8</sup>:  
如計劃成員的香港身份證並未載有出生月份及 / 或日子，請提供載有該計劃成員出生日期的證明<sup>註8</sup>：

- 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<sup>Note 7</sup>  
有關計劃成員出生日期的法定聲明<sup>註7</sup>正本

\* You can visit the MPFA web site [www.mpfa.org.hk](http://www.mpfa.org.hk) to download a copy of the relevant form 您可登入積金局網址 [www.mpfa.org.hk](http://www.mpfa.org.hk) 下載有關表格

#### (3) Amount Of Benefits To Be Withdrawn From Each Account Specified In Section II(1)<sup>Notes 9, 10</sup> (Please ✓ the appropriate box) 擬從第II(1)部份指明的每個帳戶提取的權益金額<sup>註9及註10</sup> (請在適當的方格內填上 ✓ 號)

Your withdrawal request **CANNOT** be processed if you do not select one of the below options. 如您沒有選擇以下的選項，有關申索申請將無法處理。

- A lump sum<sup>Note 11</sup>  
整筆<sup>註11</sup> **OR**  Specify withdrawal amount<sup>Note 12</sup>: HK \$ \_\_\_\_\_ 港元  
註明提取金額<sup>註12</sup> (If more than one member account are involved according to section II (1), the above specified withdrawal amount will be redeemed from each of the member accounts.  
如第II (1) 部份包括多於一個成員帳戶，上述所註明之金額將從每個成員帳戶內提取。)

The withdrawal amount may not be paid in the exact amount that you have specified above due to rounding of decimal places for redemption of fund units. 提取的金額或會因贖回基金單位時有關小數點的捨入而引致與上述註明的提取金額有差異。

## Section III – Authorization & Declaration

### 第三部份 – 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\*<sup>Note 1</sup> hereby authorize the trustee to terminate the relevant scheme member account(s) as referred to in Section II(1) upon  
本人 / 我們\*<sup>註1</sup> 謹此授權受託人在以下情況終止在第II(1)部份所述的計劃成員帳戶：

- (i) withdrawal of the full amount of benefits with no residual balance in the said account(s);  
該帳戶內的權益已被全數提取，並無剩餘款項；
- (ii) (for employee contribution account only) termination of the employment in relation to the contribution account; and  
(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；及
- (iii) (for self-employed person contribution account only) cessation of the self-employment, with effect from  
(只適用於自僱人士供款帳戶) 終止自僱，生效日期為 \_\_\_\_\_

(DD日/MM月/YYYY年)

#### (2) Declaration 聲明

I/We\*<sup>Note 1</sup> 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\*<sup>註1</sup> 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\*。

Signature of the claimant(s)  
申索人簽署

Date (DD/MM/YYYY)  
日期 (日 / 月 / 年)

**REMINDER: Please sign only when the form is fully completed.**  
**提示：請僅於表格填妥後方可簽署。**

\* delete whichever is not applicable  
請刪去不適用者

◆ 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 one year's imprisonment on the first conviction and a \$200,000 fine and two years' imprisonment on each subsequent conviction. A person who knowingly and wilfully 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 two 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，任何人明知而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。

Completed form should be sent to the administrator of the Scheme,

"Provident Funds Services, Manulife (International) Limited, 21/F., Tower A, Manulife Financial Centre, 223 - 231 Wai Yip Street, Kwun Tong, Kowloon, Hong Kong".  
請將填妥的表格寄交本計劃管理人「香港九龍觀塘偉業街223 - 231號宏利金融中心A座21樓宏利人壽保險（國際）有限公司公積金服務部」。

**Explanatory Notes on Claim Form for Payment of MPF Accrued Benefits (“Benefits”) on Grounds 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強積金累算權益（「權益」）的表格（第MPF(S) – W(R)號表格）註釋**

- (1) Either the scheme member or person(s) appointed as a committee of the 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 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部份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 claimant/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 trustee; or  
查閱周年權益報表或受託人提供的其他報表；或
  - (iii) through the member enquiry facilities available from the trustee.  
受託人為成員提供的諮詢服務。
- If you are in doubt, please contact the trustee of the MPF registered scheme (“scheme”) concerned.  
如有疑問，請聯絡有關強積金註冊計劃（「計劃」）的受託人。
- (4) In processing a claim for payment, the trustee of the scheme concerned may request the claimant to produce the original documents for checking purpose, if necessary.  
如有需要，有關計劃的受託人在處理付款申索時可能會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 claimant’s 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<sup>Note 6</sup>; 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）<sup>註6</sup>；及
  - (iii) the original statutory declaration form made by the committee of the estate for a claim for payment of benefits (Form MPF(S) - W(SD4))<sup>Note 7</sup> (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 grounds of early retirement shall not be required.  
產業受託監管人就申索權益所作的法定聲明表格（第MPF(S)-W(SD4)號表格）<sup>註7</sup>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 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. If a claimant or scheme member provides a copy of the identity card/passport when submitting this form, the information on the identity card/passport will apply to all of the member’s products/services in Hong Kong and Macau provided by all companies within the Manulife group of companies and also companies which provide trustee/custodian services (except for change of name).  
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），以供有關受託人核對申索人 / 計劃成員的姓名及護照號碼。若申索人或計劃成員於遞交本表格時一併提供身份證/護照副本，所提供的身份證/護照資料將適用於成員持有並由宏利集團旗下公司，以及為本公司提供信託/託管服務的公司於香港及澳門所提供的產品/服務上（更改姓名除外）。
- (7) The statutory declaration must be a 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，法定聲明須在監誓員（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監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 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的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 scheme, the claimant should fill in a separate form for each account.  
如申索人擬就同一個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。

**Explanatory Notes on Claim Form for Payment of MPF Accrued Benefits (“Benefits”) on Grounds 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強積金累算權益（「權益」）的表格（第MPF(S) – W(R)號表格）註釋**

- (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 trustee, for payment of the member's benefits in a lump sum or for the first four withdrawals by instalments (or number of free withdrawals by instalments offered by the scheme) each calendar year. Payments in excess of four times (or number of free withdrawals by instalments offered by the scheme) in a calendar year may be subject to fees or financial penalties. In the case of Manulife, payment in excess of four times in a calendar year is not subject to any additional fee.
- 受託人不得就向計劃成員整筆支付或每公曆年首四次（或計劃准予免費分期提取的次數）向計劃成員分期支付權益，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四次（或計劃准予免費分期提取的次數），受託人可向計劃成員收取費用或施加罰款。就宏利而言，如向計劃成員支付權益的次數多於每公曆年四次，並不會收取任何額外費用。
- (11) This option is applicable for withdrawing the 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 scheme concerned and benefits derived from tax deductible voluntary contributions). Please consult the trustee of the scheme concerned for details.
- 此提取方式適用於從第II(1)部份指明的每個計劃成員帳戶內提取整筆權益（如計劃成員根據有關計劃的管限規則有權提取自願性供款所產生的權益，則包括該等權益，另外亦包括由可扣稅自願性供款所產生的權益）。詳情請向有關計劃的受託人查詢。
- (12) This option is applicable for withdrawing the benefits by INSTALMENTS 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 scheme concerned and benefits derived from tax deductible voluntary contributions). For each scheme member account, the specified withdrawal amount will be redeemed proportionally from each sub-account (if any) according to the fund allocation as of the day on which the 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 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 trustee of the scheme concerned.
- 此提取方式適用於從第II(1)部份指明的每個計劃成員帳戶內分期提取權益（如計劃成員根據有關計劃的管限規則有權提取自願性供款所產生的權益，則包括該等權益，另外亦包括由可扣稅自願性供款所產生的權益）。就每個計劃成員帳戶，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（如有）中贖回註明的提取金額（如計劃成員根據有關計劃的管限規則有權提取由自願性供款所產生的權益，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，請向有關計劃的受託人另行提出申索。