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Manulife 宏利

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# EMPLOYEE CHOICE ARRANGEMENT ("ECA") - TRANSFER ELECTION FORM

**(For an employee to transfer MPF accrued benefits ("benefits") from a contribution account in an MPF registered scheme ("scheme") under current employment ("Original Scheme") to an account in a scheme elected by the employee ("New Scheme") during employment)**

**「僱員自選安排」— 轉移選擇表格（適用於僱員在現職期間把現職的強積金註冊計劃（「原計劃」）供款帳戶內的強積金累算權益（「權益」）轉移至自選計劃（「新計劃」）的帳戶）**

**Sections 148A and 148B of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)**

**《強制性公積金計劃（一般）規例》（第485A章）第148A及148B條**

(a) Please read the **"Guide to Transfer of MPF Accured Benefits ("Benefits") under Employee Choice Arrangement ("ECA")"** (the **"Guide"**) before you complete this Form.
(b) Please complete this form or Form MPF(S)-P(P) issued by the Mandatory Provident Fund Schemes Authority ("MPFA") and submit it to the trustee of New Scheme.
(c) Please use BLOCK LETTERS to complete this Form and initial next to any corrections you make.
(d) *means delete whichever is inappropriate. Please insert "N.A." if not applicable.
(e) The information collected from you and in respect of you in support of this election of transfer can be used by Manulife, trustee(s), relevant service provider(s), and the government or regulatory bodies including the MPFA in activities relating to the processing of your election(s) of transfer as requested in this Form. 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. You are required to supply the information in this Form and failure to do so may result in your transfer being delayed.
(f) The MPFA and other regulatory bodies in any jurisdiction shall be authorized to inspect any information under the scheme.
(g) By writing to the Privacy Officer of Manulife Provident Funds Trust Company Limited, you can correct and have access to your personal data.
(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.

(a) 填寫本表格前，請先閱讀《**「僱員自選安排」強積金累算權益（「權益」）轉移指南**》（《**指南**》）。
(b) 請填妥本表格或強制性公積金計劃管理局（簡稱「積金局」）發出的第MPF(S)-P(P)號表格，並提交予新計劃的受託人。
(c) 請以正楷填寫本表格。如須作出任何刪改，請於刪改處旁簽署。
(d) *請刪去不適用者。請在不適用處填上「不適用」。
(e) 宏利、受託人、相關服務提供者及政府或規管機構，包括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轉移選擇事宜。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、政府或規管機構，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。請提供本表格所需的資料，否則您的轉移申請或會因此而被延誤。
(f) 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) 您可以書面向宏利公積金信託有限公司之個人資料主任更改及查閱您的個人資料。
(h) 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取得該通知。

## Section I – Scheme Member's Details 第一部份 – 計劃成員資料

1. Name 姓名 (same as that shown on your Hong Kong Identity (HKID) Card [Note 1] 與您的香港身份證上的姓名相同 [註1]) :

Surname in English 英文姓氏 | Other Name in English 英文名字 | Name in Chinese 中文姓名

2. 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)

3. 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 (if any 如有)

4. Residential Address 住址 (There is no need to complete below unless you need to update your record 如非更新記錄，可無須填寫) :
(Note: All correspondences will be sent to the following address 備註：所有通訊文件將寄往以下住址)

Room / Flat 室 | Floor 樓 | Block 座 | Name of Building 大廈名稱

Name of Estate 屋苑名稱 | Street No. / Street Name 街道號碼 / 街道名稱

District 區域 ☐ H.K. 香港 ☐ KLN. 九龍 ☐ N.T. 新界 ☐ Others 其他 _____

The above address applies to all of your 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. 您所提供的住址，適用於您持有，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. 如以上住址只適用於此計劃成員帳戶，請在方格內填上「✔」號。**

## Section II – Contribution Account Information In Original Scheme 第二部份 – 原計劃的供款帳戶資料

5. Name of Original Scheme [Note 2] 原計劃名稱 [註2] :

Scheme Member Account No. [Note 2] 計劃成員帳戶號碼 [註2] :

Employer's Identification No. [Note 2,3] 僱主識別號碼 [註2,3] :



Manulife (International) Limited *(Incorporated in Bermuda with limited liability)*
宏利人壽保險（國際）有限公司 *（於百慕達註冊成立之有限責任公司）*

## Section III – Transfer Of Benefits Note 4 第三部份 – 轉移權益註4

Please indicate the part(s) of benefits in your contribution account of Original Scheme that you wish to transfer out to another MPF account.
請註明您擬把原計劃供款帳戶內哪部分的權益轉移至另一個強積金帳戶。

Please select either option (a) **or** (b) and ✓ as appropriate:
請選擇(a)**或**(b)， 並於適當方格內填上 ✓ 號：

☐ (a) **Transfer ALL Benefits 轉移全部權益**

I wish to transfer **ALL** the benefits comprising the following parts from my contribution account of Original Scheme as its governing rules permit:
本人擬在管限規則准許下轉移原計劃供款帳戶內以下**全部**權益：

- Employee mandatory contributions in current employment Note 5,6
  現職期間的僱員強制性供款 註5,6
- Employee voluntary contributions in current employment Note 7,8
  現職期間的僱員自願性供款 註7,8
- Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s) Note 9
  以往工作所累積並已轉移至供款帳戶的強制性供款 註9
- Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s) Note 8,10
  以往工作所累積並已轉移至供款帳戶的自願性供款 註8,10

Please transfer the benefits to the following personal account:
請把權益轉移至以下個人帳戶：

| | |
|---|---|
| Name of New Scheme Note 11<br>新計劃名稱 註11 | ☐ Manulife Global Select (MPF) Scheme 宏利環球精選(強積金)計劃<br>☐ Others (please specify) 其它 (請註明)： |
| Scheme Member Account No. Note 11<br>計劃成員帳戶號碼 註11 | |

**OR 或**

☐ (b) **Transfer Part(s) of Benefits 轉移部分權益**

I wish to transfer the following **part(s)** of the benefits from my contribution account of Original Scheme as its governing rules permit:
(you may select one or more parts below and ✓ as appropriate)
本人擬在管限規則准許下轉移原計劃供款帳戶內以下部分權益：（您可選擇轉移以下其中一部分或多個部分， 請在適當方格內填上 ✓ 號）

| Benefits to be transferred from Original Scheme 由原計劃轉出的權益 | Type of account receiving the benefits 接收權益的帳戶類別 |
|---|---|
| ☐ Employee mandatory contributions in current employment Note 5,6<br>現職期間的僱員強制性供款 註5,6 | Personal account only<br>只限個人帳戶 |
| ☐ Employee voluntary contributions in current employment Note 7,8<br>現職期間的僱員自願性供款 註7,8 | |
| ☐ Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s) Note 9<br>以往工作所累積並已轉移至供款帳戶的強制性供款 註9 | Personal account **or** contribution account<br>個人帳戶 **或** 供款帳戶 |
| ☐ Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s) Note 8,10<br>以往工作所累積並已轉移至供款帳戶的自願性供款 註8,10 | |

Please transfer the benefits selected above to the following account:
請把上述選擇的權益轉移至以下帳戶：

| | |
|---|---|
| Name of New Scheme Note 11<br>新計劃名稱 註11 | ☐ Manulife Global Select (MPF) Scheme 宏利環球精選(強積金)計劃<br>☐ Others (please specify) 其它 (請註明)： |
| Account Type Note 11<br>( Select one only# and ✓ as appropriate )<br>帳戶類別 註11<br>( 只可選擇一項#，請於適當方格內填上 ✓ 號 ) | ☐ Personal account 個人帳戶<br>**or 或**<br>☐ Contribution account 供款帳戶<br>(Employer's Identification No. Note 3,11 僱主識別號碼 註3,11 : _____ ) |
| Scheme Member Account No. Note 11<br>計劃成員帳戶號碼 註11 | |

# If you wish to transfer different parts of benefits from your contribution account to different MPF accounts, please fill in a separate Form MPF(S)-P(P) for each MPF account that receives the benefits.
如欲把供款帳戶內不同部分的權益轉移至不同的強積金帳戶，請就每個將會接收該等權益的強積金帳戶分別填寫一份第MPF(S)-P(P)號表格。

## Section IV – Authorization And Declaration 第四部份 – 授權及聲明

(a) I hereby give consent to the trustee of New Scheme and the MPFA to disclose information supplied by me in support of this election of transfer to the trustee(s) concerned, and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.
本人同意，新計劃的受託人及積金局可為處理本人的轉移申請，向相關受託人及相關服務提供者披露本人就此項轉移申請提供的資料，或使該等機構/人士能夠取覽或披露該等資料。

(b) I confirm and declare that 本人確認及聲明：

- I have read and understood the Explanatory Notes and the Guide, and have voluntarily elected to transfer my MPF benefits in accordance with this Form;
  本人已閱讀及明白註釋及《指南》的內容，並自願選擇按照本表格轉移強積金權益；
- at the date of submitting this Form, I am employed by the employer in relation to the contribution account in Original Scheme; and
  在提交本表格當日，本人受僱於為本人開立原計劃供款帳戶的僱主；及
- to the best of my knowledge and belief, the information given in this Form is correct and complete.
  盡本人所知所信，本表格所提供的資料均屬正確無訛且無缺漏。

| For service enquiries, please contact :<br>**如有服務查詢，請聯絡** | |
|---|---|
| Contact Person<br>聯絡人 | **SCB Online Sales Code** |
| Contact Number<br>聯絡電話 | |
| Code<br>編號 | **580004** |

Signature of the scheme member Note 12 計劃成員簽署 註12

Date 日 期

For inquiries, please contact your MPF intermediary or call Manulife Member Hotline on 2108 1388. 如有任何查詢，請聯絡閣下的強積金中介人或致電宏利成員熱線2108 1388。
Completed form should be sent to the scheme administrator,"Hong Kong Retirement, 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)有限公司香港退休業務部」。

## Explanatory Notes 註 釋

1. If you do NOT possess a HKID Card, please fill in your name as shown on your passport.
如你沒有香港身份證，請填上你在護照上的姓名。

2. The transfer election may not be processed if the Name of Original Scheme, Scheme Member Account Number or the Employer's Identification Number is not provided or is incorrect. This information can be found in your membership certificate, notice of acceptance, notice of participation or annual benefit statement. If you are in doubt, please contact your trustee of Original Scheme or your employer. Please refer to the MPFA website (www.mpfa.org.hk) for the name of schemes.
如你沒有提供原計劃名稱、計劃成員帳戶號碼或僱主識別號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可於成員證明書，接納通知、參與通知或周年權益報表獲取有關資料。如有疑問， 請聯絡你原計劃的受託人或僱主。有關強積金計劃的名稱， 可參閱積金局網站 (www.mpfa.org.hk) 的資料。

3. The Employer's Identification Number is the number assigned by the trustee to the employer concerned. Trustees may use different names for this number (e.g. account number, company code, contract number, employer account number, employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). The number can be found in the statements issued by the trustees or through the member enquiry facilities available from the trustees. If you are in doubt, please contact your trustee or your employer.
僱主識別號碼即受託人為有關僱主編配的號碼。受託人或會使用不同名稱來設定此號碼（例如帳戶編號、僱主編號、合約編號、強積金客戶編號、參與計劃編號、計劃編號、附屬計劃編號）。你可查閱受託人發出的報表或透過受託人提供的成員查詢服務獲取該號碼。如有疑問，請聯絡你的受託人或僱主。

4. If any part of the benefits chosen under section III contains nil balance, that part will not be processed.
如你在第III部選擇轉移的權益的任何部分是「零」結餘，則該部分權益的轉移申請將不獲處理。

5. (a) This means all benefits in the sub-account referred to in section 78(6)(b) of the Mandatory Provident Fund Schemes (General) Regulation ("the Regulation").
這是指《強制性公積金計劃（一般）規例》（《規例》）第78(6)(b)條所提述的分帳戶內的全部權益。

   (b) For a casual employee in an industry scheme, this sub-account generally contains the benefits derived from all the employee mandatory contributions made to this sub-account whilst working as a casual employee with different employers.
就行業計劃的臨時僱員而言，這個分帳戶一般包含在成員以臨時僱員身份受僱於不同僱主期間向這個分帳戶所作出的所有僱員強制性供款所產生的權益。

6. If you have already elected to transfer out the benefits derived from the employee mandatory contributions once (or, if the governing rules of Original Scheme allow more than once, but the transfer elections you have made have reached the maximum number of times allowed by the governing rules) in the same calendar year, transfer of that part of the benefits will not be processed. Please refer to paragraph (4) of the Guide for more information.
如你已於同一公曆年內要求把僱員強制性供款所產生的權益轉出一次（或如原計劃的管限規則准許你作出多於一次的轉移，但你轉移的次數已達該上限），則該部分權益的轉移申請將不獲處理。詳情請參閱《指南》的第(4)段。

7. (a) This means all benefits in the sub-account referred to in section 78(6)(e) of the Regulation.
這是指《規例》第78(6)(e)條所提述的分帳戶內的全部權益。

   (b) For a casual employee in an industry scheme, this sub-account generally contains the benefits derived from all the employee voluntary contributions made to this sub-account whilst working as a casual employee with different employers.
就行業計劃的臨時僱員而言，這個分帳戶一般包含在成員以臨時僱員身份受僱於不同僱主期間向這個分帳戶所作出的所有僱員自願性供款所產生的權益。

8. If you request to transfer out the benefits derived from the voluntary contributions but the governing rules of Original Scheme do not allow this, the option(s) will not be processed. Please refer to paragraph (3) of the Guide for more information.
如你要求把自願性供款所產生的權益轉出，但原計劃的管限規則並不准許轉移，則有關轉移選項將不獲處理。詳情請參閱《指南》的第(3)段。

9. This means all benefits in the sub-account referred to in section 78(6)(c) of the Regulation. This part generally contains benefits derived from the mandatory contributions that are attributable to your former employment(s) or former self-employment(s) and that have been transferred into the contribution account under current employment.
這是指《規例》第78(6)(c)條所提述的分帳戶內的全部權益。這部分一般包含以往受僱或自僱工作所累積並已轉移至現職供款帳戶的強制性供款所產生的權益。

10. This means all benefits in the sub-account referred to in section 78(6)(f) of the Regulation. This part generally contains benefits derived from the voluntary contributions that are attributable to your former employment(s) or former self-employment(s) and that have been transferred into the contribution account under current employment.
這是指《規例》第78(6)(f)條所提述的分帳戶內的全部權益。這部分一般包含以往受僱或自僱工作所累積並已轉移至現職供款帳戶的自願性供款所產生的權益。

11. The transfer election may not be processed if the Name of New Scheme, Account Type, Employer's Identification Number or your Scheme Member Account Number is not provided or is incorrect. The information can be found in your membership certificate, notice of acceptance, notice of participation or annual benefit statement. You may, however, leave the Employer's Identification Number and the Scheme Member Account Number blank if you have recently enrolled in the scheme and have not been notified of those numbers. If you are in doubt, please contact your trustee of New Scheme. Please refer to the MPFA website (www.mpfa.org.hk) for the name of schemes.
如你沒有提供新計劃名稱、帳戶類別、僱主識別號碼或計劃成員帳戶號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可於成員證明書，接納通知、參與通知或周年權益報表獲取有關資料。不過，如你最近才參加計劃，並未獲悉僱主識別號碼及計劃成員帳戶號碼，則可留空此項。如有疑問，請聯絡你新計劃的受託人。有關強積金計劃的名稱，可參閱積金局網站 (www.mpfa.org.hk)。

12. The signature must be the same as your specimen signature previously given to your trustee of Original Scheme. Please note that the transfer may not be processed if the signature provided in this Form does not match with the specimen signature previously given to your trustee of Original Scheme. If you are in doubt, please contact your trustee of Original Scheme.
你的簽署必須與你之前給予原計劃的受託人的簽署式樣相同。請注意，若本表格上的簽署與你之前給予原計劃的受託人的簽署式樣不符，有關轉移或不獲處理。如有疑問，請聯絡你原計劃的受託人。

13. If the benefit transfer is effected among member accounts under the Manulife Global Select (MPF) Scheme, such request will be processed (i) by way of unit transfer for the unitized constituent funds; and (ii) by way of transferring account balance for the non-unitized constituent fund. There is no selling or buying of funds during the transfer process. The latest contribution investment instruction for the member account as indicated in Section III of this Form is not applicable to the benefits being transferred under such transfer arrangement. Member should refer to the latest MPF Scheme Brochure and the Key Scheme Information Document for details.
如涉及宏利環球精選（強積金）計劃內的成員帳戶之間的轉移，(i)所有單位化的成分基金以轉移單位方式進行轉移；及(ii)非單位化的成分基金會以轉移帳戶結餘方式進行轉移。換言之，轉移過程並不涉及任何基金買賣，而於本表格第三部份所示的成員帳戶的投資指示並不適用於此等轉移安排。成員須參閱最新的強積金計劃說明書及主要計劃資料文件以了解有關詳情。

14. If the transfer is effected from a contribution account under the Manulife Global Select (MPF) Scheme to a personal account within the same scheme, and the member is not an existing personal account member in the scheme and no personal account application form is received by Manulife:
如由宏利環球精選（強積金）計劃的供款帳戶轉移至同一計劃內的個人帳戶，而成員並非該計劃的現有個人帳戶成員及宏利未收妥成員所提交之個人帳戶申請表格：

   (a) the investment of all future contribution and/or transferred-in benefits from another scheme to the personal account shall be invested according to the default investment strategy ("DIS") due to you have not given any investment instruction for the new personal account. For details of the DIS, including its automatic de-risking features and fee level, you may refer to the MPF Scheme Brochure and the Key Scheme Information Document of the Scheme or the related information which is available on our website at www.manulife.com.hk;
因您在新設立的個人帳戶尚未給予任何投資指示，該帳戶的未來供款及/或自另一計劃轉入權益將按照預設投資策略投資。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及主要計劃資料文件或相關資料，有關資訊可見於宏利網頁(www.manulife.com.hk)；

   (b) Manulife is authorised to use the member's personal information under the contribution account, from which the transfer is being made, for setting up the personal account. Save as otherwise stated, personal information supplied in this Form will be used for the administration of the transfer only; and
宏利獲授權使用成員於擬進行轉移的供款帳戶內的個人資料作為設立個人帳戶之用。除非另有註明，否則在本表格提供的個人資料將只用作處理是項轉移；及

   (c) for admission as a personal account member, the member hereby confirms that he/she has previously read the MPF Scheme Brochure and the Key Scheme Information Document of the Scheme. He/She agrees to be bound by the master trust deed and its rules of the said scheme and he/she agrees that the use/transferee of his/her personal information disclosed by Manulife for the purpose of the contribution account can also apply to the personal account. He/She undertakes if there is any change in the information, he/she shall notify Manulife as soon as reasonably practicable. He/She understands that professional advice from a qualified investment consultant should be obtained before making any investment decision and his/her agreement to the investment allocation arrangement above is based on his/her own independent judgment and opinion.
就參與成為個人帳戶成員，成員在此確認他/她已閱讀本計劃的強積金計劃說明書及主要計劃資料文件的內容。他/她同意受集成信託契約之規定及條例所管限，並且同意宏利於供款帳戶就個人資料的披露所涉及的用途/受讓人，也同樣適用於個人帳戶。他/她承諾假使有關資料有任何更改，他/她將於合理的切實可行範圍內盡快通知宏利有關之改動。他/她明白在作出任何的投資決定前，須先向合資格投資顧問尋求專業建議。而他/她同意上述的投資分配安排，是基於他/她的獨立判斷和意見。

15. If you are not an existing member of the Manulife Global Select (MPF) Scheme and (i) elect to transfer the benefits to contribution account with Manulife, please follow up with your employer to submit the employee enrolment form; or (ii) elect to transfer the benefits to personal account, please submit a personal account application form together with this Form.
如閣下並非現有宏利環球精選（強積金）計劃成員，而屬以下情況：(i)選擇轉移權益至宏利供款帳戶，請與僱主跟進遞交僱員參加表格；或(ii)選擇轉移權益至個人帳戶，請將個人帳戶申請表格連同本表格一併交回。