

## Minimum MPF Benefits Transfer Form for MPF Exempted ORSO Registered Scheme 最低強積金利益轉移表格 – 獲強積金豁免的職業退休註冊計劃

**Notes:**

- (1) This Form should be used when a scheme member wishes to transfer the minimum MPF benefits from MPF exempted ORSO registered scheme to a MPF scheme.
- (2) Please complete this form in BLOCK LETTERS and tick the appropriate boxes.
- (3) \* Means delete whichever is inappropriate.
- (4) Please initial next to any corrections you make on this Form.
- (5) Leave it blank if a member has newly joined the scheme and is not aware of the account number for his/her new account.
- (6) If there are contributions outstanding, accrued benefits will not be transferred until all of the outstanding contributions and contribution surcharges, if any, have been paid to Manulife or the Mandatory Provident Fund Schemes Authority ("MPFA") has given its written consent for Manulife to effect the transfer, whichever is earlier.
- (7) Transfer will be done upon receipt of full evidence and information.
- (8) The information collected from you and in respect of you in support of this election of transfer can be used by Manulife, approved trustee(s), relevant service provider(s), and the government or regulatory bodies including the MPFA in activities relating to the processing of the transfer as requested in this Form. The information may be transferred to other division(s) within Manulife, the relevant approved trustee(s), government or regulatory bodies including the MPFA or other parties including delegates, intermediaries or any service providers of Manulife or the relevant approved 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 request being delayed.
- (9) The MPFA and other regulatory bodies in any jurisdiction shall be authorized to inspect any information under the scheme.
- (10) By writing to the Privacy Officer of your scheme administrator, you can correct and have access to your personal data.
- (11) 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).
- (12) Upon completion of this Form, a scheme member should submit this Form to:
  - (a) New Employer : For election to have the benefits transferred to a contribution account in the new employer's scheme. The new employer should then pass this Form to the trustee of that scheme.
  - (b) MPF trustee : For election to have the benefits transferred to master trust scheme or industry scheme selected by the scheme member.

**注意事項:**

- (1) 計劃成員如欲將獲強積金豁免的職業退休計劃內的最低強積金利益轉移至強積金計劃，可使用本表格。
- (2) 請以正楷填寫本表格，並在適當空格內加✓號。
- (3) \* 表示把不適當之處刪除。
- (4) 如須作出任何刪改，請於刪改之位置旁簽署。
- (5) 如計劃成員因新加入計劃而未知悉新帳戶的號碼，可留空不填。
- (6) 如供款未清繳，直至未清繳的供款及供款附加費（如適用）已全部支付予宏利，或強制性公積金計劃管理局（簡稱「積金局」）已向宏利發出書面同意令轉移生效（以較前者為準），方會轉移累積權益。
- (7) 於宏利收齊所需文件後，方會進行轉移。
- (8) 宏利、核准受託人、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就此項轉移申請的資料以處理您在本表格內要求的轉移事宜。為達致該等目的，或直接與該等目的有關的目的，所提供的資料可轉移予宏利內其他部門、有關核准受託人、政府或規管機構，包括積金局或其他人士/團體，包括宏利或有關核准受託人的受委託者、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轉移至香港特別行政區及以外地區。請提供本表格所需的資料，否則您的要求或會因此而被延誤。
- (9) 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。
- (10) 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。
- (11) 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。
- (12) 填妥本表格後，計劃成員應將之交予：
  - (a) 新僱主 : 適用於計劃成員選擇將權益轉移至其新僱主的計劃供款帳戶內，及後新僱主須向該計劃之受託人發出本表格。
  - (b) 強積金受託人: 適用於計劃成員選擇將權益轉移至集成信託計劃或行業計劃。

### Section I – Details of The Scheme Member

#### 第一部份 – 計劃成員資料

1. Name : (as shown on ID Card / Passport)  
姓名 (必須與身份證 / 護照相同)

Surname in English 英文姓氏 \_\_\_\_\_

Given Name in English 英文名字 \_\_\_\_\_

Name in Chinese 中文姓名 \_\_\_\_\_

2. Sex :  M 男  F 女

3.  HKID No. : \_\_\_\_\_  
香港身份證號碼 (\_\_\_\_\_)  
 Passport No. : \_\_\_\_\_  
護照號碼  
(ONLY for person without HKID Card 只供沒有香港身份證的人士填寫)

4. Date of Birth : \_\_\_\_\_  
出生日期 dd 日 / mm 月 / yyyy 年

5. Day Time Contact Number : \_\_\_\_\_  
日間聯絡電話號碼

6. Residential Address (all correspondence will be sent to the following address) :  
住址 (所有通訊文件將寄往以下地址)

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 \_\_\_\_\_

All the above contact information 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. 以上所有聯絡資料，均適用於您持有，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 member account only, please "✓" this box. 如以上地址只適用於此成員帳戶，請在方格內填上「✓」號。

### Section II – Details of Existing ORSO Registered Scheme

#### 第二部份 – 現有職業退休註冊計劃資料

Details of the **account from** which minimum MPF Benefits are to be transferred:  
擬轉移源自最低強積金利益帳戶資料:

Name of employer of existing ORSO Registered Scheme : \_\_\_\_\_  
現有職業退休註冊計劃僱主名稱

Name of the Service Provider : \_\_\_\_\_  
服務者名稱

Address of the Service Provider : \_\_\_\_\_  
服務者地址

Name of the Policy / Plan : \_\_\_\_\_  
計劃名稱

Policy / Plan Number : \_\_\_\_\_  
計劃編號

Member's Account Number : \_\_\_\_\_  
成員帳戶號碼



## Section III – Fund Transfer Options 第三部份 – 資金轉移選項

### Important Note 重要事項：

- (1) In transferring your minimum MPF benefits (MMB) to an MPF scheme, please be aware of how the transferred-in benefits will be invested. In general, the MMB will be invested according to the default investment strategy (“DIS”) if you either (i) do not give or have not given any investment instructions for the account to your new trustee or (ii) have given investment instructions for the account to invest accrued benefits according to the DIS. Please approach your new trustee to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in the new scheme, please also approach the new trustee.  
在轉移最低強積金利益至另一個強積金計劃時，請留意轉入帳戶的權益將會如何投資。一般而言，如您(i)沒有或尚未就有關帳戶向您的新受託人給予任何投資指示；或(ii)已就有關帳戶給予投資指示，要求把累算權益按照預設投資策略投資，則轉入該帳戶的權益將按照預設投資策略投資。如有需要，請向新受託人查詢詳情。如欲就新計劃的帳戶更改或給予投資指示，亦請聯絡新受託人。
- (2) If you have reached, or are approaching, the age of 50, 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 investment in the DIS and your transfer request take place at around the same time, the approved trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant approved trustee(s) if you wish to know the details of how the approved trustee(s) will handle these transactions.  
如您已年滿或快將年滿50歲，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您的投資風險的時間，與接獲您的轉移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轉移權益的次序。如欲瞭解核准受託人如何處理該等交易，請向相關核准受託人查詢詳情。
- (3) For details of the DIS, including its automatic de-risking features and fee level, you may refer to the MPF Scheme Brochure of the new scheme or the related information.  
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，您可參考新計劃的強積金計劃說明書或相關資料。

I elect to have the minimum MPF Benefits, in my account stated in Section II above handled as follows: (please ✓ one box)  
本人選擇將本人於上述第二部份所列之成員帳戶內的最低強積金利益以下列方法處理：(請在適當空格內加✓)

- (a)  To my contribution account with my new employer. Details of the contribution account are:

轉移至本人的新僱主供款帳戶。此供款帳戶詳情如下：

Important : Please note that once you choose this transfer option, your accrued benefits cannot be transferred again until cessation of employment with your new employer.  
重要事項：請注意轉移項目一經選定，您的累算權益便不能轉移，直至終止受僱於新僱主。

Name of New Employer :

新僱主名稱 \_\_\_\_\_

New Employer's Participation Number (if known) :

新僱主參與編號 (如知悉) \_\_\_\_\_

Name of the Trustee :

受託人名稱 \_\_\_\_\_

Sub-Scheme No. :

附屬計劃編號 \_\_\_\_\_

Name of the Scheme :

計劃名稱 \_\_\_\_\_

Scheme Member's Account Number (if known) :

計劃成員帳戶號碼 (如知悉) \_\_\_\_\_

- (b)  To the Personal Account in another master trust scheme / industry scheme\*. Details of the account are:

轉移至本人於集成信託計劃/行業計劃\*內的新帳戶內。詳情如下：

Name of the Trustee :

受託人名稱 \_\_\_\_\_

Name of the Scheme :

計劃名稱 \_\_\_\_\_

Sub-Scheme No. :

附屬計劃編號 \_\_\_\_\_

Scheme Member's Account Number (if known) :

計劃成員帳戶號碼 (如知悉) \_\_\_\_\_

## Section IV – Declaration 第四部份 – 聲明

I declare that, to the best of my knowledge and belief, the information given in this Form / and its attachments\* is correct and complete.◆  
本人聲明，就本人所知及所信，本表格上提供的資料/及其附件\*均屬正確及完整。◆

Signature of Scheme Member 計劃成員簽署 \_\_\_\_\_

Date 日期 \_\_\_\_\_

◆ Warning: Under section 43E of the Ordinance, a person who, in any document given to MPFA or a trustee of an MPF exempted ORSO registered scheme, 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 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 2 years and to a fine.

警告：根據《條例》第43E條，任何人在給予積金局或獲強積金豁免的職業退休註冊計劃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 scheme administrator,

"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」。