

October 18, 2019

Dear Customer,

Manulife Global Select (MPF) Scheme (“the Scheme”) - Revision of Administration Forms for the Purpose of Compliance with the Common Reporting Standard (“CRS”)

With the enactment of the legislative amendments to the Inland Revenue Ordinance, MPF schemes will be required to comply with CRS for Automatic Exchange of Financial Account Information (“AEOI”) effective **January 1, 2020 (“the effective date”)**. In this connection, we are writing to inform you of the potential implications to you and your employees as scheme participants and the necessary points to note in particular for member enrolment process. For your basic understanding about AEOI/CRS, please find attached a copy of **Frequently Asked Questions (MPF & ORSO)**.

In relations to MPF administration, we would like to draw your particular attention that **new members joining the Scheme on or after the effective date MUST provide a Tax Residency Self-Certification**. To streamline the enrolment process, we have added the required content under Part B in the **Employee Enrolment Form of the Scheme (“the Form”)** for collection of the person’s tax residency information and declaration.

Employers should note that if an employee fails to provide a complete and valid self-certification, it will result in delay in setting up the member account and any contribution settlement subsequently. So you are advised to provide this latest version of the Form to new employees starting now, please ensure the Form is completed, signed and dated before returning to us. To avoid confusion, we urge you to dispose of any stock that you might have for the old version of the Form. The revised Form can also be obtained via the following channels:

- by calling our Employer Hotline on (852) 2108 1234
Choose language – 1 (Cantonese) or 2 (English) → Press # →1 →2 →1 → Input your 7-digit Sub-scheme Number
- by scanning the QR Code below to download the Form at www.manulife.com.hk

For your information, some other MPF administration forms will also be revised for the same purpose. Therefore, please be reminded to obtain the updated version of forms from our website at www.manulife.com.hk.

In addition, you will notice from the enclosed that we are taking an environmental friendly approach to serve the Offering Document of the Scheme and other essential documents (“the Documents”) by means of a summary sheet, **Essential documents and guide for persons joining the Manulife Global Select (MPF) Scheme**. From now on, when distributing the Form to your new employees, please be reminded that this summary sheet, replacing the bulk of hard copy documents, **MUST** be issued in conjunction so they can read the Documents carefully before completing the Form.

Should you have any query on the above matters, please feel free to call our Employer Hotline on (852) 2108 1234.

Yours faithfully,
Provident Funds Services, Employee Benefits

- Encl. 1. Manulife Global Select (MPF) Scheme Employee Enrolment Form
2. Essential documents and guide for persons joining the Manulife Global Select (MPF) Scheme
3. Automatic Exchange of Financial Account Information in Tax Matters (AEOI) /
Common Reporting Standard (CRS) – Frequently Asked Questions (MPF & ORSO)



(EE Kit)

信件編號：ERCCM/09/ADM-Mu-A

親愛的客戶：

**宏利環球精選(強積金)計劃(「本計劃」)
因應遵守共同匯報標準之強積金行政表格修訂**

因應稅務條例修訂，強積金計劃必須自 **2020年1月1日(「生效日」)**起遵守自動交換財務帳戶資料(「自動交換資料」)下的共同匯報標準規定。有見及此，我們現函通知您新規定對作為計劃參與者的您及您的僱員所帶來的潛在影響及相關重要事項，特別是僱員登記程序。有關自動交換資料／共同匯報標準的基本資料，請參閱隨函附上的「常見問題-(強積金及職業退休計劃)」。

就強積金的行政事宜，敬請注意，**新僱員於生效日起加入強積金計劃時必須提交稅務居民身份自我證明**。為簡化開戶程序，我們已將有關合規內容納入計劃僱員參加表格(「參加表格」)B部分以收集個人稅務居民身份的資料及聲明。

僱主應注意如僱員未能提交完整及有效的自我證明，有關成員的帳戶開戶程序及其後的供款安排將延後處理。因此，由即日起，僱主可提供最新版本之參加表格予新僱員，請確保其參加表格已填妥、簽署並註明日期。我們建議您應儘快丟棄舊版本的參加表格，以免混淆。修訂版參加表格可循以下途徑索取：

- 致電宏利僱主熱線 (852) 2108 1234
選擇語言 - 廣東話按1字、英語按2字 → 按# → 1 → 2 → 1 → 輸入您的7位數字附屬計劃編號
- 掃描下方的二維碼，於宏利網頁www.manulife.com.hk下載參加表格

請注意，部份其他強積金行政表格亦因應上述原因而需修訂，故此，請謹記於宏利網頁www.manulife.com.hk下載最新版的行政表格。

與此同時，為響應環保，請留意我們現以隨函附上之「重要文件及指引 - 適用於參加宏利環球精選(強積金)計劃人士」(「概覽單張」)涵蓋本計劃銷售文件及其他重要文件。日後，於派發參加表格予新僱員時，務必連同概覽單張一併發出，以取替相關印刷本文件。新僱員在填寫參加表格前必須仔細閱讀概覽單張上所載的各項文件。

如就上述事宜有任何查詢，歡迎致電宏利僱主熱線(852) 2108 1234。

僱員福利公積金服務部 謹啟

2019年10月18日

- 附件
1. 宏利環球精選(強積金)計劃僱員參加表格
 2. 重要文件及指引 - 適用於參加宏利環球精選(強積金)計劃人士
 3. 自動交換財務帳戶資料／共同匯報標準 - 常見問題(強積金及職業退休計劃)



(EE Kit)

以上是本函的中文譯本。中英文版本內容如有差異，概以英文版本為準。