

To 致: The Hongkong and Shanghai Banking Corporation Limited

香港上海滙豐銀行有限公司

PO Box 74203 Kowloon Central Post Office 九龍中央郵政信箱74203號

HSBC Customer Service Hotline 滙豐客戶服務熱線: 2288 6655



DAPF

Occupational Retirement Schemes

職業退休計劃

Change of Member Data Report – Defined Benefit Scheme
成員資料更改表 – 界定利益計劃

INCDR51

| Scheme ID 計劃編號 | | Pay centre ID 付款中心編號 | | Employer name 僱主名稱 | | | ⁽²⁾ <input type="checkbox"/> HKD 港元 <input type="checkbox"/> USD 美元 | | |
|---|-------------------|---|-----------------|---|---|---|--|------------|--|
| HKID/ Passport no. 香港身分證/ 護照號碼 | Staff no. 職員號碼 | Member name (Same as HKID/Passport) 成員英文姓名 (與香港身分證/護照相同) | | Effective date of change 更改生效日期 (YYYY/MM/DD) (年/月/日) | Category ID ⁽³⁾ 福利界別 ⁽³⁾ | Job grade ⁽³⁾ 工作級別 ⁽³⁾ | Monthly salary 月薪 | | |
| | | Surname 姓 | First name(s) 名 | | | | | | |
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| Note 注意: (1) Please complete in BLOCK LETTERS. 請以正楷填寫表格。 (2) Please tick ✓ the appropriate box. 請於適當的方格內加上「✓」號。 (3) Please use the "Category ID" and "Job grade" as designated by us. 請填寫指定的「福利界別」及「工作級別」編號。 | | | | We declare that the above information is true and correct. 茲證明上述所填報資料均屬正確無誤。 | | | | | |
| Remarks 備註 | | | | Authorised signature(s) 授權人簽署 | | | | Date 日期 | |
| For Office Use Only | | Signature verified by Date | | Entered by Date | | Checked by Date | | | |

Personal information collection statement 收集個人資料聲明

(Applicable to schemes regulated by an insurance arrangement 適用於由保險安排所規管的計劃)

1. The personal data provided by Participating Employers (if applicable) and/or Members and details of transactions or dealings by such Participating Employers (if applicable) and/or Members from time to time may, to the extent not prohibited by applicable law, be used for one or more of the following purposes:—(i) the administration and/or management of or in connection with the contributions or benefits or accounts in respect of the Participating Employers (if applicable) and/or Members under the HSBC occupational retirement schemes and Hang Seng occupational retirement schemes administered by the HSBC Group; (ii) conducting direct marketing activities of occupational retirement scheme products and/or occupational retirement scheme services by entities of the HSBC Group as described in paragraph 5 below only if your consent is obtained (which includes an indication of no objection); (iii) improving and furthering the provision of occupational retirement scheme products and/or services (including through customer research or surveys) by entities of the HSBC Group; (iv) matching for occupational retirement scheme related purpose with other personal data concerning the relevant Participating Employers (if applicable) and/or Members; and (v) compliance or in accordance with an order of a court, or compliance or in accordance with a law or a requirement made under a law (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information), or compliance or in accordance with any agreement or treaty or any present or future contractual or other commitment with any regulators or government authorities in any jurisdictions, including but not limited to an agreement by one or more entities of the HSBC Group under the provisions of U.S. tax law known as the Foreign Account Tax Compliance Act ('FATCA'), and the guidelines, guidance or requests given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information (collectively, the 'Compliance Obligations'). 不時由參與僱主(如適用)及／或成員所提供的個人資料及該等參與僱主(如適用)及／或成員的交易或事務往來的詳情, 限於不在適用法律禁止之列, 將可被用於以下一項或多項用途: (i) 由滙豐集團管理行政的滙豐職業退休計劃及恒生職業退休計劃下與參與僱主(如適用)及／或成員的供款或權益或戶口有關的行政事宜及／或管理; (ii) 在獲得你的同意下(包括表示不反對), 進行以下第5段所述由滙豐集團成員所提供的職業退休計劃產品及／或職業退休計劃服務的直接有關促銷活動; (iii) 改善及進一步提供由滙豐集團成員所提供的職業退休計劃產品及／或服務(包括透過客戶研究或調查); (iv) 為任何職業退休計劃相關的用途而核對相關參與僱主(如適用)及／或成員的其他個人資料; 及(v) 遵守或按照法庭命令, 或遵守或按照法律或根據法律訂立的規定(例如《稅務條例》及其條文, 包括關於自動交換財務賬戶資料的條文), 或遵守或按照任何與任何司法管轄區的監管機構或政府機關之間達成的協議或條約或任何現在或將來的合同或其他承諾, 包括但不限於與一個或多個滙豐集團成員根據美國名為《外國賬戶稅務合規法案》(「《外國賬戶稅務合規法案》」)的稅務法律的規定所達成的協議, 及稅務局所提供或發出的指引、指導或要求, 包括關於自動交換財務賬戶資料的指引、指導或要求(統稱為「合規義務」)。
2. Failure to provide your information may result in us being unable to process your application or perform the services you request. 如你未能提供資料將可能導致我們未能處理你的申請或提供你所要求的服務。
3. Personal data held by us relating to a Participating Employer (if applicable) and/or Member will be kept confidential but, to the extent not prohibited by applicable law, such information may be provided by us or any of our service providers to the following parties for the purposes set out in paragraph 1:—(i) any regulators or government authorities; (ii) any service provider, agent or contractor who provides administrative, telecommunications, computer, payment, data processing, matching, storage, customer research or survey or other services in connection with the operation of our occupational retirement scheme business; (iii) relevant Participating Employers (if applicable); (iv) entities of the HSBC Group. Such information may be transferred to a place outside Hong Kong Special Administrative Region. 由我們持有參與僱主(如適用)及／或成員的個人資料將予保密, 但限於不在適用法律禁止之列, 我們或任何我們的服務供應商可能會將該等資料提供給以下各方作第1段所述的用途: (i) 任何監管機構或政府機關; (ii) 任何提供與營運我們的職業退休計劃業務有關的行政、電訊、電腦、付賬、數據處理、核對、儲存、客戶研究或調查或其他服務的任何服務供應商、代理人或承包商; (iii) 相關的參與僱主(如適用); (iv) 滙豐集團成員。該等資料可能轉移至香港特別行政區以外的地方。
4. You have the right to request access to and correction of your personal data held by us. Request should be addressed to: The Data Protection Officer, HSBC Life (International) Limited, PO Box 74203, Kowloon Central Post Office. For enquiries, please contact our Hotline at (852) 2288 6655. 你有權要求查閱及更改由我們持有你的個人資料。如有需要, 可致函九龍中央郵政信箱74203號向滙豐人壽保險(國際)有限公司資料保障主任提出要求。如有查詢, 可致電(852) 2288 6655。
5. To the extent not prohibited by applicable law, we, entities of the HSBC Group, intend to use your personal data in direct marketing of occupational retirement scheme products and/or occupational retirement scheme services, and we require your consent (which includes an indication of no objection) for that purpose. In this connection, please note that: 限於不在適用法律禁止之列, 我們, 滙豐集團成員, 擬把你的個人資料用於職業退休計劃產品及／或職業退休計劃服務的直接促銷, 而我們為該用途須獲得你的同意(包括表示不反對)。就此, 請注意:
 - (i) your name, contact details, other products and services portfolio information, transaction pattern and behaviour, financial background and demographic data held by us from time to time may be used in direct marketing; and 我們可能把我們不時持有你的姓名、聯絡資料、其他產品及服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷; 及
 - (ii) the occupational retirement scheme products and/or occupational retirement scheme services offered by entities of the HSBC Group may be marketed. 可用作促銷由滙豐集團成員所提供的職業退休計劃產品及／或職業退休計劃服務。

If you no longer want us to use your personal data in direct marketing activities as described in paragraph 5 above, you may exercise your opt-out right by notifying us. 如你不再希望你的個人資料被用於上述第5段所述的直接促銷活動, 你可通知我們, 行使你的選擇權拒絕促銷。

Personal information collection statement (Cont'd) 收集個人資料聲明(續)

(Applicable to schemes governed by a trust 適用於受信託所管限的計劃)

1. The personal data provided by Participating Employers (if applicable) and/or Members and details of transactions or dealings by such Participating Employers (if applicable) and/or Members from time to time may, to the extent not prohibited by applicable law, be used for one or more of the following purposes:—(i) the administration and/or management of or in connection with the contributions or benefits or accounts in respect of the Participating Employers (if applicable) and/or Members under the HSBC occupational retirement schemes and Hang Seng occupational retirement schemes administered by the HSBC Group; (ii) conducting direct marketing activities of occupational retirement scheme products and/or occupational retirement scheme services by entities of the HSBC Group as described in paragraph 5 below only if your consent is obtained (which includes an indication of no objection); (iii) improving and furthering the provision of occupational retirement scheme products and/or services (including through customer research or surveys) by entities of the HSBC Group; (iv) matching for occupational retirement scheme related purpose with other personal data concerning the relevant Participating Employers (if applicable) and/or Members; (v) compliance or in accordance with an order of a court, or compliance or in accordance with a law or a requirement made under a law (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information), or compliance or in accordance with any agreement or treaty or any present or future contractual or other commitment with any regulators or government authorities in any jurisdictions, including but not limited to an agreement by one or more entities of the HSBC Group under the provisions of U.S. tax law known as the Foreign Account Tax Compliance Act ('FATCA'), and the guidelines, guidance or requests given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information (collectively, the 'Compliance Obligations'). 不時由參與僱主(如適用)及／或成員所提供的個人資料及該等參與僱主(如適用)及／或成員的交易或事務往來的詳情，限於不在適用法律禁止之列，將可被用於以下一項或多項用途：(i)由滙豐集團管理行政的滙豐職業退休計劃及恒生職業退休計劃下與參與僱主(如適用)及／或成員的供款或權益或戶口有關的行政事宜及／或管理；(ii)在獲得你的同意下(包括表示不反對)，進行以下第5段所述由滙豐集團成員所提供的職業退休計劃產品及／或職業退休計劃服務的直接有關促銷活動；(iii)改善及進一步提供由滙豐集團成員所提供的職業退休計劃產品及／或服務(包括透過客戶研究或調查)；(iv)為任何職業退休計劃相關的用途而核對相關參與僱主(如適用)及／或成員的其他個人資料；(v)遵守或按照法庭命令，或遵守或按照法律或根據法律訂立的規定(例如《稅務條例》及其條文，包括關於自動交換財務賬戶資料的條文)，或遵守或按照任何與任何司法管轄區的監管機構或政府機關之間達成的協議或條約或任何現在或將來的合同或其他承諾，包括但不限於與一個或多個滙豐集團成員根據美國名為《外國賬戶稅務合規法案》(「《外國賬戶稅務合規法案》」)的稅務法律的規定所達成的協議，及稅務局所提供或發出的指引、指導或要求，包括關於自動交換財務賬戶資料的指引、指導或要求(統稱為「合規義務」)。
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5. To the extent not prohibited by applicable law, we, entities of the HSBC Group, intend to use your personal data in direct marketing of occupational retirement scheme products and/or occupational retirement scheme services, and we require your consent (which includes an indication of no objection) for that purpose. In this connection, please note that: 限於不在適用法律禁止之列，我們，滙豐集團成員，擬把你的個人資料用於職業退休計劃產品及／或職業退休計劃服務的直接促銷，而我們為該用途須獲得你的同意(包括表示不反對)。就此，請注意：
 - (i) your name, contact details, other products and services portfolio information, transaction pattern and behaviour, financial background and demographic data held by us from time to time may be used in direct marketing; and 我們可能把我們不時持有你的姓名、聯絡資料、其他產品及服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷；及
 - (ii) the occupational retirement scheme products and/or occupational retirement scheme services offered by entities of the HSBC Group may be marketed. 可用作促銷由滙豐集團成員所提供的職業退休計劃產品及／或職業退休計劃服務。

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