To 致： HSBC Provident Fund Trustee (Hong Kong) Limited
c/o The Hongkong and Shanghai Banking Corporation Limited 香港上海滙豐銀行有限公司
PO Box 73770 Kowloon Central Post Office 九龍中央郵政信箱73770號
or 或
Place into the MPF drop-in box at designated HSBC branches
投放於指定滙豐分行的強積金寄存辦理箱
HSBC MPF Employer Hotline 滙豐強積金僱主熱線：2583 8033
HSBC MPF Member Hotline 滙豐強積金成員熱線：3128 0128

HKSAR
INPR

THE GOVERNMENT OF THE HKSAR
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)]
香港特區政府 – 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 [表格 MPF(S) – W(R)]

Note 注意：

1. Please complete in CAPITAL and BLOCK LETTERS and tick ✓ the appropriate box(es). 請用大楷及正楷填寫，並於適當的方格內加上「✓」號。
2. 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 for payment of benefits 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 'The Government of the HKSAR – Claim Form for Payment of MPF Accrued Benefits (Benefits) on Grounds of Permanent Departure from Hong Kong/Total Incapacity/Terminal Illness/Small Balance/Death [Form MPF(S) – W(O)]' (HKSAR INPO). 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申索權益，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「香港特區政府 – 基於永久性地離開香港／完全喪失行為能力／罹患末期疾病／小額結餘／死亡的理由而申索強積金累算權益(權益)的表格 [表格 MPF(S) – W(O)]」(HKSAR INPO)。
3. 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。
4. If any information provided is incorrect or incomplete, the relevant trustee may not be able to process your request. 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你的申請。
5. Please read the explanatory notes carefully before completing this Form. 填寫本表格前，請先細讀註釋。
6. The personal data to be supplied in support of this claim for payment of benefits are to be used for processing your claim. The personal data you supply may, for such purpose, be transferred to the relevant service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority (the Authority). 就此項申索權益申請提供的個人資料，將用作處理你的申索。你提供的個人資料可能會為該目的而轉交相關服務提供者，以及政府或規管機構，包括強制性公積金計劃管理局(管理局)。
7. Withdrawal of benefits derived from voluntary contributions paid pursuant to section 11 of the Mandatory Provident Fund Schemes Ordinance (the Ordinance) is subject to the governing rules of the scheme concerned. Please check the information from the offering document of the scheme concerned, which can be found on the website of the trustee of the scheme concerned. Please contact the relevant trustee for details. 就依據《強制性公積金計劃條例》(《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。詳情請查閱有關計劃的要約文件，要約文件可於有關計劃受託人的網站閱覽。請聯絡有關受託人瞭解詳情。
8. 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 those for withdrawal of benefits derived from mandatory contributions (except that under section 11A(3), certain provisions relating to offsetting of severance payments 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，提取權益須受與提取由強制性供款所產生的權益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)。
9. 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. A 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, if applicable, the number of free withdrawals by instalments offered by the scheme) from the same MPF account are made in a calendar year. Please contact 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，請細心考慮你的個人需要、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的交易費用；如計劃成員在一個公曆年內從同一個強積金賬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)(如適用)，受託人可向該計劃成員收取額外費用或施加罰款。請聯絡有關受託人瞭解詳情。
10. For enquiries about account details and information on specific schemes or funds, please contact the relevant trustee. 如欲查詢賬戶詳情及個別計劃或基金的資料，請聯絡有關受託人。
11. For general enquiries regarding a claim for payment of benefits, please contact the relevant trustee or the Authority (email: mpfa@mpfa.org.hk or hotline: 2918 0102). 有關申索權益的一般查詢，請聯絡有關受託人或管理局(電郵地址：mpfa@mpfa.org.hk或 熱線電話：2918 0102)。
12. Please provide a certified true copy of your HKID card, if this was not previously provided or if there has been any change of information contained in your HKID card. If you are NOT a holder of a HKID card, please provide a certified true copy of your passport. 若以往未曾提供或資料已變更，請提供你的香港身分證之認證副本。如你非持有有效的香港身分證，請提供你的護照之認證副本。
13. Certified true copies should be certified by any of the following personnel 提交認證副本可經由下列人士核證：
    - A certified public accountant/lawyer/banker/notary public acceptable to entities of HSBC Group; or 任何滙豐集團成員認可的執業會計師／律師／往來銀行／公證人；或
    - A member of Hong Kong Institute of Chartered Secretaries (HKICS); or任何香港特許秘書公會會員；或
    - A MPF specialist at HSBC designated branches – You may bring along your HKID card/passport to any one of HSBC designated branches for verification purpose. For the information about the HSBC designated branches, please visit www.hsbc.com.hk/mpf. 指定滙豐分行強積金職員 – 你可攜同你的香港身分證／護照親臨任何一間指定滙豐分行，以便我們核實你的身分。查詢指定滙豐分行詳情，請瀏覽www.hsbc.com.hk/mpf 。
14. 'Registered Scheme' means a retirement benefits scheme registered under section 21 or 21A of the 'MPF Ordinance'. 「註冊計劃」指已根據《強積金條例》第21條或第21A條註冊的退休福利計劃。
15. For a scheme member who has ceased employment, wishes to claim the benefits on the following grounds by the claimant/scheme member, the employer's written notification of the employee's cessation of employment to the trustee is required. If the employer fails to do so, the claim processing on all MPF account(s) stated on the form may possibly be delayed until the administrator of HSBC MPF scheme receives the termination notification or relevant documents 若已離職的計劃成員以基於以下情況為由，並打算由申索人／計劃成員申索權益，有關之僱主必須向受託人以書面遞交該僱員的離職通知書。倘若僱主未能遞交，有關表格上所列明的強積金賬戶之申索將可能會延遲處理，直至滙豐強積金計劃行政管理人收到離職通知書或其他相關文件：
    a) attaining the retirement age of 65 已達到65歲退休年齡：
        i) voluntary contributions, ORSO transfers and/or special contributions (employer's portion) 自願性供款、轉移自職業退休計劃及／或特別供款(僱主部分)

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ii) voluntary contributions and/or ORSO transfers (employee's portion); or 自願性供款及／或轉移自職業退休計劃(僱員部分)；或

b) early retirement. 提前退休。

16. Please note that if any of your change of investment instruction is scheduled on any day that the claim for payment of benefits of the MPF account(s) as stated in this Form is to be processed, your change of investment instruction will be postponed or will not be processed if your MPF account(s) will be terminated after the claim for payment of benefits is completed. In addition, the information of your terminated MPF account(s) will not be shown in HSBC website www.hsbc.com.hk/mpf and HSBC Mobile Banking app. 請注意，如你的更改投資指示的執行日同為本表格所述強積金賬戶的權益申索的執行日，你的更改投資指示將會順延或若你的強積金賬戶於完成申索權益後終止，你的更改投資指示將不獲處理。此外，已終止的強積金賬戶資料將不會顯示在滙豐的網址www.hsbc.com.hk/mpf和滙豐流動理財應用程式。

17. If there is any new contribution or transfer in amount received under your HSBC MPF account, your request for claim would be processed after such new contribution or transfer in has completed the subscription investment. 若你的滙豐強積金賬戶收到新的供款或轉移金額，你的申索要求將會在有關供款或轉移金額完成認購投資後才獲處理。

18. In the circumstances where 在以下情況下：

- You are a self-employed person who are still self-employed after attaining the retirement age of 65, and 你是一位自僱人士並於達到65歲退休年齡後仍然維持自僱身分；及
- You wish to claim the benefits on the grounds of attaining the retirement age of 65 without terminating of the MPF account, and 你打算以已達到65歲退休年齡為理由提取有關強積金供款賬戶中的權益而並不終止相關強積金賬戶；及
- The contribution day for your last contribution period (i.e. the contribution calculated up to the date before your attainment of the age of 65) is beyond the date when you reach the retirement age of 65, and 你須支付的最後供款之相關供款日(即該供款計算至你達到65歲前)乃於你在年滿65歲當日之後；及
- The last contribution is not yet payable as at the time of claiming the benefit payment 你於完成此提取指示時仍未需繳交最後供款期之供款

At the time the claim of benefit payment is processed, the last contribution may not be included. There are two options available to settle your last contribution payment 於處理你的此提取指示時，仍未繳交的最後供款並不會同一時間被提取。就須支付的最後供款期之供款安排，你可作以下選擇：

(a) You may submit the remittance statement (available for download from HSBC MPF website www.hsbc.com.hk/mpf) with the appropriate amount (payment by cheque is acceptable) as your last contribution payment, together with this claim form so your claim of benefit payment will be processed and available to be withdrawn in its entirety (i.e. including last contribution) at the same time; or 你可把此表格連同最後供款期之付款結算書及支票(如適用)一併遞交，以便所有權益(包括最後供款期之供款)能在處理此提取指示時同一時間提取。有關付款結算書，你可透過滙豐強積金網頁www.hsbc.com.hk/mpf下載；或

(b) You may make a payment as your last contribution after submission of this claim form and by the contribution day for your last contribution period. When you wish to make a claim of benefit payment, a separate claim form is required to be submitted so your claim will be processed to include the benefits which is made after the previous claim request accordingly. Note that we are subject to certain reporting obligations to the MPFA should we not receive a completed Remittance Statement and payment in full by the contribution day. 你可於完成此提取指示後及於相關供款日前支付最後供款期之供款。因此，若你欲提取強積金賬戶內的權益(包括此提取指示後衍生之權益)，你需再次遞交權益提取申請。請注意，如你沒有在供款日或之前遞交完整之付款結算書及款項，我們必須將欠款情況匯告予強制性公積金計劃管理局。

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

20. (Applicable to Member who opts-in for MPF e-Statement / e-Advice 適用於強積金電子結單／電子通知書的成員)

Please be reminded to save/print all previously issued MPF e-Statement / e-Advice, where applicable, of your to-be-closed MPF account for record purpose. The MPF e-Statement / e-Advice will not be available via HSBC Online banking after the relevant MPF account is closed. 請在你的強積金賬戶終止前列印或儲存該賬戶的強積金電子結單／電子通知書(如適用)作往後的參考或備用。相關強積金賬戶一經終止，有關的強積金電子結單／電子通知書將無法透過滙豐網上理財使用。

21. The information provided will be used in accordance with the relevant MPF Ordinance and/or its Regulations and the same manner as mentioned in the "Personal Information Collection Statement for HSBC Mandatory Provident Fund" ("PICS"). The PICS can be obtained through HSBC MPF website www.hsbc.com.hk/mpf or MPF hotline 2583 8033 (Employer) or 3128 0128 (Member). By signing this form, your present choice of receiving direct marketing information will remain unchanged. If you wish to update the use of your personal data for direct marketing purpose as stated in the PICS from the HSBC MPF scheme, you may exercise your right by notifying us. 所有已提供的資料將按照有關強積金條例及／或其規例及《滙豐強積金的收集個人資料聲明》(「聲明」)處理。該聲明可透過以下滙豐強積金網站www.hsbc.com.hk/mpf或強積金熱線2583 8033(僱主)或3128 0128(成員)索取。在簽署本表格後，你現時關於接收直接促銷資訊的選擇將維持不變。如你希望更新在滙豐強積金計劃聲明中使用你的個人資料作直接促銷的用途，你可通知我們行使你的選擇權。

Reminder 提示：

- 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 offering document of the scheme or contact the relevant trustee 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。請查閱計劃的要約文件或聯絡有關受託人瞭解詳情。
- 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。你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. If the annual de-risking of your investments in the DIS and your claim for payment of benefits take place at around the same time, the trustee of the scheme shall sequence the de-risking and the claim in accordance with its procedures and in compliance with the Ordinance. Please contact the trustee of the scheme if you wish to know the details of how the trustee of the scheme handles these transactions. 如現時你的權益是按照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。如計劃的受託人在預設投資策略下按年降低你的投資風險的時間，與接獲你的申索權益申請的時間相當接近，該計劃的受託人將根據其運作程序及在符合《條例》規定的情況下，訂定處理降低風險及申索權益的次序。如欲瞭解計劃受託人如何處理該等交易，請與計劃受託人聯絡。
- 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 contact the relevant trustee 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 Authority's publications available on the Authority's website (www.mpfa.org.hk). 如權益並非整筆提取，計劃成員賬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。請聯絡有關受託人瞭解詳情。請詳細考慮你的投資目標、財政狀況、風險承受能力及有關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，可於管理局的網站(www.mpfa.org.hk)參閱管理局發布的資訊刊物。

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SECTION I – DETAILS OF THE CLAIMANT Note 1 /SCHEME MEMBER 第 I 部 – 申索人註1／計劃成員資料

(1) Claimant details 申索人資料

(i) Full Name in English Note 2 英文全名註2 (same as that shown on your HKID card/Passport 與香港身分證／護照上的姓名相同)

Surname 姓氏 | Given name 名字

(ii) Identification number 身分證明文件號碼

☐ HKID Card No. 香港身分證號碼 _____ ( )

☐ Passport No. 護照號碼 (ONLY for person without HKID Card 本欄僅供沒有香港身分證的人士填寫) _____

(iii) Correspondence address[1] 通訊地址[1]

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

Name of estate 屋邨名稱 | Number and name of street/road 門牌號碼及街道名稱

District/Postal code 地區／郵政編號 | ☐ HK 香港 ☐ KLN 九龍 ☐ NT 新界 ☐ Others 其他 | City 城市 | Country/Region 國家／地區

	Country/Region code 國家／區域編號	Area code 地區號碼	Phone no. 電話號碼
(iv) Day time contact no.[1,2] 日間聯絡電話[1,2]			
(v) Mobile phone no.[1,2] 流動電話號碼[1,2]			

(vi) Email address[1] 電郵地址[1]

[1] **After verifying the signature provided in this claim form, the correspondence address, day time contact no., mobile phone no. and email address will be updated accordingly for the scheme member's other relevant MPF scheme accounts under HSBC MPF for future correspondence. The withdrawal statement and cheque (if any) related to this claim request will be sent to this correspondence address after completion of this claim request. If you are also a user of the HSBC Online Banking and Mobile Banking services solely for your participation in the HSBC MPF scheme without having a bank account with HSBC ("MPF only"), please provide your correspondence address in English, mobile phone number, and email address in this form. Otherwise, your HSBC Online Banking and Mobile Banking services (MPF only) and request for regeneration of a Personal Identification Number (PIN) may be affected.核實你在此申索表格所提供的簽署後，此通訊地址，日間聯絡電話，流動電話號碼及電郵地址將被更新於滙豐強積金下計劃成員的其他有關強積金計劃賬戶作為日後通訊。當此表格之申索完成處理後，有關提取報表及支票(如有)將會寄往此通訊地址。如你同時是僅參與滙豐強積金計劃而沒有滙豐銀行賬戶的滙豐網上理財及流動理財用戶，請在本表格提供你的英文通訊地址、流動電話號碼及電郵地址。否則你的滙豐網上理財及流動理財服務(僅限強積金)和重新發出密碼的要求可能會受到影響。**

[2] If you are providing overseas contact details outside Hong Kong SAR, please also include the correct Country/Region Code and Area Code. However, for overseas mobile numbers, usually there is no need to add an Area Code and you may check with your telecommunications service provider for details. 如你所提供的是香港特別行政區以外的海外聯絡資料，請包括正確的國家／區域及地區編號；然而，海外手提電話號碼一般毋須加上地區編號，詳情請向你的電訊服務供應商查詢。

(2) Scheme member details 計劃成員資料(if different from the claimant 如與申索人不同)

(i) Full Name in English Note 2 英文全名註2 (same as that shown on your HKID card/passport 與香港身分證／護照上的姓名相同)

Surname 姓氏 | Given name 名字

(ii) Identification number 身分證明文件號碼

☐ HKID Card No. 香港身分證號碼 _____ ( )

☐ Passport No. 護照號碼 (ONLY for scheme member without HKID Card 本欄僅供沒有香港身分證的計劃成員填寫) _____

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SECTION II – DETAILS OF THE CLAIM 第 II 部 – 申索資料

(1) Account Information 賬戶資料 (please ✓ the appropriate box 請在適當的方格內填上✓號)

(i) Name of the scheme 計劃名稱： HSBC MPF – SuperTrust Plus 滙豐強積金智選計劃

(ii) ☐ All accounts under the scheme 計劃內所有賬戶

☐ Selected account(s) under the scheme 計劃內的指明賬戶 (please specify the scheme member account no. (i.e. Employer ID/Scheme ID) Note 3,13 請註明計劃成員賬戶號碼(即僱主編號／計劃編號)註3,13)

(a) _____

(b) _____

(c) _____

(2) Grounds for claiming benefits and the required documents Note 4, 5 申索權益的理由及所需文件註4,5 (please ✓ the appropriate box 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)部指明的所有賬戶分期提取權益，因此無須就是次申索再次提供所需文件。

☐ **Attaining the retirement age of 65 已達到65歲退休年齡**

(i) Please indicate your current employment status with the employer (for Employee only) 請列明你現時與僱主之僱傭狀況(只適用於僱員)：

☐ Ceased employment 已離職 ☐ Still employed 仍然受僱

(ii) Required documents 所需文件：

☐ 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 Note 6 計劃成員的香港身分證副本，以供核對其姓名、出生日期及身分證號碼(如不擬親身出示計劃成員的香港身分證供核對有關資料)註6

☐ Instructions for Treatment of Accrued Benefits after Retirement Age (INAT) (for HSBC MPF scheme member who is during employment and wish to make a claim for all benefits derived from employer's voluntary contributions (if applicable), employer's ORSO transfers (if applicable), employer's special contributions (if applicable), employee's voluntary contributions (if applicable) and member's ORSO transfers (if applicable)) 到達退休年齡後的累算權益處理指示書 (INAT)(如屬在職僱員及欲申索所有僱主自願性供款(如適用)、轉移自職業退休計劃的僱主部分(如適用)、僱主特別供款(如適用)、僱員自願性供款(如適用)和轉移自職業退休計劃的成員部分(如適用)款項的滙豐強積金成員)

☐ **Early Retirement 提早退休**

Required documents 所需文件：

☐ 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 Note 6; and 計劃成員的香港身分證副本，以供核對其姓名、出生日期及身分證號碼(如不擬親身出示計劃成員的香港身分證供核對有關資料)註6；及

☐ the original statutory declaration form on early retirement (Form MPF(S) – W(SD1)) Note 7 有關提早退休的法定聲明表格(第MPF(S)-W(SD1)號表格)註7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 Note 8 如計劃成員的香港身分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註8：

☐ 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 month and day of the issue date of the HKID card circled or by other means to indicate that the scheme member wishes to use the month and day of the issue date of the HKID card as the month and day of birth; or 在計劃成員的香港身分證副本上圈出(或以其他方式顯示)該身分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分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 Note 7 有關計劃成員出生日期的法定聲明註7正本

(3) Amount of benefits to be withdrawn from each account specified in Section II(1) Note 9, 10, 11 擬從第(II)(1)部指明的每個賬戶提取的權益金額註9,10,11 (please ✓ the appropriate box 請在適當的方格內填上✓號)

☐ A lump sum; or 整筆；或

☐ Specify one-off withdrawal amount Note 12 註明一次性提取金額註12：HKD 港幣_____元 (A minimum withdrawal amount of HKD3,000 is recommended for each time. Please note that at each withdrawal, if your account balance is less than or equal to 105% of your requested withdrawal amount, your entire account balance will be withdrawn as a lump sum. 建議每次提取的金額不少於港幣3,000元。請注意，在每次提取時，倘若你的賬戶結餘低於或等於你要求提取的金額的105%，你的整個賬戶結餘將全數提取。)

☐ Monthly regular withdrawal amount Note 12, 14-16 每月定期提取金額註12, 14-16: HKD 港幣_____元 (A minimum regular withdrawal amount of HKD3,000 is recommended. Please note that at each withdrawal, if your account balance is less than or equal to 105% of your requested withdrawal amount, your entire account balance will be withdrawn as a lump sum. The withdrawal instruction will be processed on the first business day of each month as the "agreed instruction date" (fund unit(s) will be redeemed by using the unit price on the first business day) after completion of the set up request. 建議定期提取的金額不少於港幣3,000元。請注意，在每次提取時，倘若你的賬戶結餘低於或等於你要求提取的金額的105%，你的整個賬戶結餘將全數提取。在完成提取設定後，提取指示會以每一個月第一個營業日作為「協議指示日」並作出處理(基金單位會以第一個營業日的基金價格贖回)。

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(4) Method of payment[Note 17] 付款方式[註17] (please ✓ the appropriate box 請在適當的方格內填上✓號)

(The direct deposit service is only available for bank account with sole account holder. For verification purpose, please provide supporting document which shows bank account number and name of account holder, such as copy of bank statement, copy of bank ATM card or copy of bank reference letter etc. If the relevant supporting document is not provided, the administrator of HSBC MPF scheme is unable to proceed with direct deposit to your bank account and the method of payment will be changed to be by cheque without prior notice. 直接存入銀行賬戶服務只適用於你以個人名義獨立持有的銀行賬戶。請提供能顯示你銀行賬戶號碼及持有人名稱的文件作核實用途，例如銀行月結單副本、銀行提款卡副本或銀行信件副本等。如未能提供有關文件，滙豐強積金計劃行政管理人不能提供直接存入銀行賬戶服務，而付款方式將轉為以支票付款及不作另行通知。)

☐ by depositing directly into a bank account under the sole name of claimant/scheme member only 直接存入只以申索人／計劃成員名義開立的銀行賬戶 (This option is available only if the trustee provides such services and there may be bank charges involved. If the claimant/scheme member chooses to have the benefits to be paid to his/her other local bank (except for HSBC in Hong Kong or Hang Seng Bank in Hong Kong) or overseas bank account directly, bank charges may apply by the claimant/scheme member's banking account. 這項選擇只適用於有提供此項服務的受託人，而銀行可能會因此收取費用。如申索人／計劃成員選擇將權益直接匯入其他本地銀行(香港滙豐或香港恒生銀行除外)或海外銀行賬戶，則該銀行可透過申索人／計劃成員的銀行賬戶收取銀行手續費。)

Name of bank account holder 銀行賬戶持有人姓名：_____

Name of bank 銀行名稱 ：

☐ HSBC in Hong Kong 香港滙豐

☐ Hang Seng Bank in Hong Kong 香港恒生銀行

☐ Other local bank, please specify 其他本地銀行，請註明：_____

☐ Overseas bank, please specify 海外銀行，請註明：_____

Bank account number 銀行賬戶號碼：_____

Bank information (for transfer to a bank account outside Hong Kong only) 銀行資料(只適用於轉賬至在香港以外地方的銀行賬戶)：

(i) Address of bank 銀行地址：_____

(ii) Swift code Swift編號：_____

(iii) Other settlement information (if any)
其他結算資料(如有)
(e.g. 例如：IBAN) _____

(iv) Currency 貨幣：_____

☐ by cheque 支票

SECTION III – DECLARATION & AUTHORISATION 第III部 – 聲明及授權書

(1) Termination of MPF account with no residual balance (if applicable) 終止沒有剩餘款項的強積金賬戶(如適用)

I / We* [Note 1] hereby authorise the trustee to terminate the relevant scheme member account(s) as referred to in Section II(1) upon 本人／我們*[註1]謹此授權受託人在以下情況終止在第(II)(1)部所述的計劃成員賬戶：

(i) withdrawal of the full amount of benefits with no residual balance in the said account(s) 該賬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 (只適用於僱員供款賬戶)該供款賬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 _____ (DD/MM/YYYY). (只適用於自僱人士供款賬戶)終止自僱，生效日期為_____ (年／月／日)。

(2) Declaration 聲明

(i) I/We*[Note 1] 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*[註1]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。†

(ii) I/We*[Note 1] have read and understood the full details of this form (including the Notes on this form) and agree to abide by the rules stated herein. 本人／我們*[註1]已細閱及明白此表格內的所有內容(包括此表格上的注意部分)，並同意遵守此述的規則。

(iii) I/We*[Note 1] have understood and agreed that the "agreed instruction date" for the monthly regular withdrawal amount stated in Section II(3) would be the first business day of each month after completion of the request on the form. 本人／我們*[註1]已理解並同意，第II(3)部所述每月定期提取金額的「協議指示日」是完成提取設定後每一個月的第一個營業日。

X _____ _____

Signature of claimant(s) 申索人簽署 Date 日期

†Warning 注意：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 HKD100,000 fine and one year's imprisonment on the first conviction and a HKD200,000 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. 根據《條例》第43E條，任何人在給予管理局或核准受託人的文件中，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，最高可處罰款港幣100,000元及監禁一年；其後每次定罪，最高可處罰款港幣200,000元及監禁兩年。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。

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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)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 authorises 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分提出申請及在相關文件簽署。請就第I部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**香港身分證，請填上護照上的姓名。

(3) Scheme member account number can be found 計劃成員賬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 of the scheme concerned; or 查閱周年權益報表或有關計劃的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查詢服務。

If you are in doubt, please contact the trustee. 如有疑問，請聯絡受託人。

(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 產業受託監管人身分的證明文件副本，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 [Note 6]; and 每名申索人的香港身分證副本，以供核對其姓名及身分證號碼(如不擬親身出示申索人的香港身分證供核對有關資料)[註6]；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)) [Note 7] (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)[註7]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 of the scheme 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. 如申索人／計劃成員沒有香港身分證，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)，以供有關計劃的受託人核對申索人／計劃成員的姓名及護照號碼。

(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 authorised 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分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 month and day of the issue date of the HKID card of the scheme member. 採用計劃成員香港身分證上的簽發日期的月份及日子。

(Please tear off 請撕下)

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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 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), the last day of the month as shown on the HKID card as the birth date of the scheme member will be used; or 以計劃成員的香港身分證所載的出生月份的最後一日(如該香港身分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), the last day of the year as shown on the HKID card as the birth date of the scheme member will be used. 以計劃成員的香港身分證所載的出生年份的最後一日(如該香港身分證只載有出生年份，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賬戶選擇不同的提取金額，須就每個賬戶分別填寫一份表格。

(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, if applicable, the number of free withdrawals by instalments offered by the scheme) each calendar year. Payments in excess of four times (or, if applicable, the number of free withdrawals by instalments offered by the scheme) in a calendar year may be subject to fees or financial penalties. Please contact the trustee of the scheme concerned on the arrangement and fees involved. 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)(如適用)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，或從該計劃成員的賬戶扣除費用或罰款，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)(如適用)，受託人可向計劃成員收取費用或施加罰款。請聯絡有關計劃的受託人，瞭解有關支付權益的安排及所涉及的費用。

(11) Applicable for withdrawing the benefits from each scheme member account specified in Sections 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 contact the trustee of the scheme concerned. 適用於從第II(1)部指明的每個計劃成員賬戶內提取權益(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，另外亦包括由可扣稅自願性供款所產生的權益)。請聯絡有關計劃的受託人瞭解詳情。

(12) This option is applicable for withdrawing the benefits by **INSTALMENTS** from each scheme member account specified in Sections 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). 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)部指明的每個計劃成員賬戶內**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由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)。就每個計劃成員賬戶，受託人會根據贖回權益當日的資金分配，按比例從每個分賬戶(如有)中贖回註明的提取金額(如計劃成員根據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)。如賬戶結餘少於申索人註明的提取金額，則賬戶內的結餘將會被全數提取。如申索人其後擬提取賬戶內餘下的權益，請向有關計劃的受託人另行提出申索。

(13) All the benefits derived from Flexi-Contributions will be paid. If you hold an independent Flexi-Contribution account, please specify the scheme ID beginning with '28'. 所有靈活供款的權益將會被支付。如你擁有一個獨立的靈活供款賬戶，請註明該以「28」為開首之計劃編號。

(14) The regular withdrawal set up instruction will be completed within seven business days of receiving the completed form. The withdrawal instruction will be processed on the first business day of each month as the "agreed instruction date" (fund unit(s) will be redeemed by using the unit price on the first business day) after completion of the set up request, and it will be normally completed within seven business days but no more than 30 calendar days. If there are any investment transactions which are to be processed on the same day (including contribution subscription, fund switching, or unit redemption) under your HSBC MPF account, your regular withdrawal request would be processed after such investment transactions have been completed. 定期提取設定指示會在收到已填妥表格的七個營業日內完成。在完成提取設定後，提取指示會以每一個月第一個營業日作為「協議指示日」並作出處理(基金單位會以第一個營業日的基金價格贖回)，並一般會在七個營業日內完成，但不會超過30個曆日。若你的滙豐強積金賬戶有任何投資交易需要在同一天處理(包括供款認購，轉換基金，或基金贖回指示)，你的定期提取指示將會在該投資交易完成後才獲處理。

(15) This regular withdrawal instruction is not applicable for any account(s) specified in Section II(1) which has an active monthly regular withdrawal instruction in place. If a scheme member intends to modify the existing monthly regular withdrawal instruction(s), please complete and return 'Change of Regular Withdrawal Instruction Form' (INRW) to the Administrator of HSBC MPF scheme. 這項定期提取指示不適用於第II(1)部中已經設定每月定期提取指示的賬戶。如計劃成員需要更改已經設定的每月定期提取指示，請填妥「更改定期提取指示表格」(INRW)及交回滙豐強積金計劃行政管理人。

(16) The arrangement(s) of the monthly regular withdrawal instruction will be ceased when the scheme member's account(s) terminates on the ground of including claim, transfer to personal account, or other employer scheme. If a scheme member intends to set up the monthly regular withdrawal instruction(s) in another HSBC MPF account(s), please complete and return '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)]' to the Administrator of HSBC MPF scheme. 當計劃成員的賬戶基於權益申索，轉移到個人賬戶，或其他僱主計劃而終止時，定期提取指示的安排亦會同時停止。如計劃成員需要在其他滙豐強積金賬戶設立新的每月定期提取指示，請填妥「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[表格 MPF(S) – W(R)]」及交回滙豐強積金計劃行政管理人。

(17) The bank account specified in Section II(4) of this form will be used for the direct deposit of the regular withdrawal payment. As each scheme member can only set up with one bank account for direct deposit, this account will replace any bank account(s) for direct deposit payment that you may have provided to us previously. 本表格第II(4)部中指定的銀行賬戶將用於直接存入定期提取的款項。 由於每個計劃成員只能使用同一個銀行賬戶進行直接存款，該指定的銀行賬戶將取代你曾經提供給我們用作任何直接存款的銀行賬戶。

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