

Starting from 1 January 2020, HSBC Mandatory Provident Fund – SuperTrust Plus becomes reporting financial institution under Inland Revenue Ordinance (Cap. 112) ('the Ordinance'). To comply with the Ordinance, please provide and confirm to us your tax residency information through the relevant new application form embedded with the Tax Residency Self-Certification for MPF scheme/account enrolled on or after 1 January 2020. Otherwise, the enrollment process for MPF scheme/account will be adversely affected and could not be completed. 由2020年1月1日開始，滙豐強積金智選計劃成為在《稅務條例》(第112章)(「條例」)下的申報金融/財務機構。為遵守條例，請於2020年1月1日或以後透過載有稅務居民自我證明的相關新申請表格向我們提供及確認你的稅務居民資料以參加強積金計劃/賬戶。否則參加強積金計劃/賬戶的程序將受到影響及無法完成。



## 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 place to the MPF drop-in box at designated HSBC branches  
或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

IN31

URIDIN31

## HSBC MANDATORY PROVIDENT FUND – SUPERTRUST PLUS SELF-EMPLOYED APPLICATION FORM (SELF-EMPLOYED) 滙豐強積金智選計劃: 自僱人士申請表(自僱人士)

### Note 注意:

- 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。
- Please read the following notes and personal information collection statement in Section H before completing this form. 請於填寫本表格前參閱以下注意事項及H部的收集個人資料聲明。
  - This application is issued in conjunction with the MPF Scheme Brochure. 本申請表必須與強積金計劃說明書一同派發。
  - Your relevant income is linked to your assessable profits as calculated in accordance with the Inland Revenue Ordinance (IRD). If your relevant income is below the maximum relevant income level for MPF purposes, you are required to provide evidence to us of your earnings in the form of your most recent Inland Revenue Notice of Assessment. You should complete Section I of this form if you have any relevant income (as defined in the MPF Scheme Brochure) that is below the maximum relevant income level for MPF purposes. 你的有關入息乃根據《稅務條例》而計算的應評稅利潤而定。如有關入息低於強積金所設定的最高有關入息水平，你必須提交最近期的評稅通知書作為入息證明。在下列情況，你應填寫本表格I部:
    - your relevant income is below the maximum income level, and your relevant income is below the maximum relevant income level for MPF purposes;
    - you cannot provide the most recent Inland Revenue Notice of Assessment, and/or 你未能提供最近期評稅通知書，及/或
    - you will make mandatory contribution based on the maximum income level. 你將根據最高有關入息水平作出強制性供款。
  - 'Trustee' means HSBC Provident Fund Trustee (Hong Kong) Limited. (Any other word or expression defined in the MPF Scheme Brochure shall have the same meaning in this form.) 「信託人」指HSBC Provident Fund Trustee (Hong Kong) Limited. (強積金計劃說明書內的任何其他字詞或字句的含義均與本表格相同。)
  - 'Self-employed person' means a person whose relevant income (otherwise than in the capacity as an employee) derives from his production (in whole or in part) of goods or services in the Hong Kong Special Administrative Region (HKSAR), or his trade in goods or services in or from HKSAR. 「自僱人士」指非以僱員身分收取有關入息的人，而該等有關入息是源自該人在香港特別行政區(特區)(全部或部分)生產貨品或提供服務，或源自在香港特區從事向香港特區或香港特區以外地方提供貨品或服務的營業。
  - The fund choices you indicate in Section F will apply to all contributions, whether mandatory or voluntary. 你於F部所填寫的投資選擇將適用於強制性及自願性供款。
- If you have chosen Chinese as your preferred language, please provide your addresses in both English and Chinese. 如你所選擇的通訊語言為中文，請同時填寫中英文地址。
- Please note that if you wish to register for HSBC Internet Banking in future (this service is not available for passport holder with passport number more than 12 digits), you should provide both your address in English and mobile phone number in this form. 請注意:如欲日後登記使用滙豐網上理財(此服務不適用於護照號碼超過12位數字的護照持有人)，你必須在本表格同時提供英文地址及流動電話號碼。
- The personal information (including any blank field) that you provided in Section A of this form but except address, contact phone number and facsimile number will automatically apply to ALL your accounts maintained with HSBC MPF under the HKID/Passport number stated in Section A4 below. If you wish to change your personal details for a specific account, please complete the 'Personal Details Change Form' (IN91). If you wish to change your personal details for non-HSBC MPF account (e.g. HSBC Banking Service), please submit a relevant change form or you can change your personal details for your HSBC accounts via the HSBC Personal Internet Banking at [www.hsbc.com.hk](http://www.hsbc.com.hk). 你於本表格A部所填寫的個人資料(包括任何留空部分)但除地址、聯絡電話號碼及傳真號碼之外，將自動適用於你以下述A部第4項之香港身分證/護照號碼登記的所有滙豐強積金賬戶。如你欲更改指定賬戶的個人資料，請填寫「更改個人資料表格」(IN91)。如你欲更改非滙豐強積金賬戶(例如滙豐銀行服務)的個人資料，請遞交有關更改表格，或可透過[www.hsbc.com.hk](http://www.hsbc.com.hk)的滙豐個人網上理財更改你的滙豐賬戶個人資料。
- 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](http://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](http://www.hsbc.com.hk/mpf)。
- The Default Investment Strategy ("DIS") is a ready-made investment arrangement mainly designed for those members who are not interested or do not wish to make an investment choice, and is also available as an investment choice itself, for members who find it suitable for their own circumstances. For those members who do not make an investment choice, their future contributions and accrued benefits transferred from another Registered Scheme will be invested in accordance with the DIS. The DIS aims to balance the long term effects of risk and return through investing in two Constituent Funds, namely the Core Accumulation Fund and the Age 65 Plus Fund, according to the pre-set allocation percentages at different ages. The DIS will manage investment risk exposure by automatically reducing the exposure to higher risk assets and correspondingly increasing the exposure to lower risk assets as the member gets older. For further details of the DIS, please refer to the relevant 'MPF Scheme Brochure'. 「預設投資策略」是一項預先制訂的投資安排，主要為沒有興趣或不打算作出投資選擇的計劃成員而設計，而對於認為適合自身情況的成員來說，「預設投資策略」本身亦可作為一項投資選擇。計劃成員如沒有作出投資選擇，其未來供款及轉移自另一註冊計劃的累積權益將會按照「預設投資策略」來作出投資。「預設投資策略」透過於不同年齡按照預定配置百分比投資於兩項成分基金(即核心累積基金與65歲後基金)，旨在平衡長期風險與回報。「預設投資策略」將會隨著成員年齡增長而自動減少投資於較高風險資產，並相應增加投資於較低風險資產，藉此管理投資風險。有關「預設投資策略」的詳情，請參閱有關「強積金計劃說明書」。
- '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。
- Please note that the administrator of the scheme may request you to provide further details and documents. 請注意:計劃行政管理人可能會要求你提供其他相關資料及文件。
- If you have already registered as a HSBC Personal Internet Banking user, you can select to receive MPF member benefit statement electronically. To know more about registration of and access to the electronic MPF member benefit statement, please visit [www.hsbc.com.hk/mpf/estatement](http://www.hsbc.com.hk/mpf/estatement). 如你已登記成為滙豐個人網上理財用戶，你可選用電子方式接收強積金成員權益報表，有關電子強積金成員權益報表的登記及查閱方法，請瀏覽[www.hsbc.com.hk/mpf/estatement](http://www.hsbc.com.hk/mpf/estatement)。

### A. Details of applicant 申請人資料

1. Full name (in English)* 全名(英文)* (same as that shown on your HKID card/Passport 與香港身分證/護照上的姓名相同) <input type="checkbox"/> Mr 先生 _____ <input type="checkbox"/> Ms 女士 _____ Surname 姓氏 _____ Given name 名字 _____	
2. Other name (in English) (if any) 別名(英文)(如有) _____	3. Previous name in English 過往英文全名 Surname 姓氏 _____ Given name 名字 _____
4. Identification number 身分證明文件號碼 (please provide a certified true copy 請附上認證副本) <input type="checkbox"/> HKID card no. 香港身分證號碼: _____ ( ) <input type="checkbox"/> Passport no. (ONLY applicable for person without HKID card, please provide the place of issue.) 護照號碼(僅供沒有香港身分證的人士填寫，請填寫簽發地點。): _____ Place of issue 簽發地點: _____	

5. Date of birth\* 出生日期\*

Year 年	Month 月	Day 日
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If your HKID card only contains the year and you have no other form of identity to prove the exact date of birth (e.g. birth certificate, passport), you should use 31 December as the day and month. Likewise, if your HKID card contains the year and month but not the day, you should use the last day of the month shown. If you leave the day and/or month blank, your date of birth will be regarded as the last day of that month or 31 December. 如你的香港身分證上只有出生年份，而你沒有其他形式的證件可證明你的實際出生日期(例如出生證明書或護照)，便應以12月31日作為出生日期。同樣地，如你的香港身分證上只有出生年份和月份而並沒註明有關日子，便應以有關月份的最後一天作為出生日期。請注意，若留空日子及/或月份，你的出生日期則被視為該月的最後一天或12月31日。

6. Place of birth 出生地區

7. Residential address (The main address the majority of the time is spent or resided) (in English)  
住宅地址(大部分時間居住在這個主要地址)(英文)

- **PO Box address is not accepted 恕不接受郵政信箱**
- **Correspondence will be sent to this address 有關通訊將寄往此地址**

Effective date for residential address 住宅地址生效日期

Year 年	Month 月
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Room/Flat 室	Floor 樓	Block 座	Name of building 大廈名稱
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Name of estate 屋邨名稱	Number and name of street/road 門牌號碼及街道名稱
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District/Postal code 地區/郵政編號	<input type="checkbox"/> HK 香港	<input type="checkbox"/> KLN 九龍	<input type="checkbox"/> NT 新界	<input type="checkbox"/> Others 其他	City* 城市*	Country/Region* 國家/地區*
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8. Previous residential address 前住址 (Please continue on a separate sheet and attach for submission if space provided is not sufficient. 如表格不敷應用，請於另紙作出補充並一併遞交。)

- Not applicable 不適用
- Previous residential address 前住址 (if reside at current residential address less than 1 year 如居於現址少於一年)

Room/Flat 室	Floor 樓	Block 座	Name of building 大廈名稱
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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	<input type="checkbox"/> HK 香港	<input type="checkbox"/> KLN 九龍	<input type="checkbox"/> NT 新界	<input type="checkbox"/> Others 其他	City 城市	Country/Region 國家/地區
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9. Nationality (Country/Region) 國籍(國家/地區) 1 : \_\_\_\_\_

Multiple Nationality (Country/Region) 多重國籍(國家/地區)

- Yes 是
- No 否

Nationality (Country/Region) 國籍(國家/地區) 2 (if any 如有) : \_\_\_\_\_

Nationality (Country/Region) 國籍(國家/地區) 3 (if any 如有) : \_\_\_\_\_

10. Sex (M/F) 性別(男/女)

	Country/Region code 國家/區域編號	Area code 地區號碼	Phone no. 電話號碼
11. Day time contact no. <sup>1</sup> 日間聯絡電話 <sup>1</sup>			
12. Mobile phone no. <sup>1,2</sup> 流動電話號碼 <sup>1,2</sup>			
13. Facsimile no. <sup>1</sup> 傳真號碼 <sup>1</sup>			

14. E-mail address<sup>2</sup> 電郵地址<sup>2</sup>

15. Date commenced self-employment 開始自僱日期

Year 年	Month 月	Day 日
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16. Scheme commencement date 計劃開展日

Year 年	Month 月	Day 日
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17. IRD file no. (if applicable) 稅務檔案號碼(如適用)

18. Preferred language for future correspondence 請選擇日後通訊的語言

- English 英文
- Chinese 中文 (請以中文填寫C部)

If preferred language is not selected, English will be used for future correspondence. 如沒有選擇，英文將會是日後通訊語言。

19. Any funds transfer in from other scheme 由其他計劃轉入資金
- Yes 是 (please provide the following information 請提供以下資料)
- Expected amount 預期金額: \_\_\_\_\_
- No. of transactions 交易次數: \_\_\_\_\_
- No 否

20. Expected account activities in the next 12 months (voluntary contribution) 預期未來12個月的賬戶安排(自願性供款):
- a. Total voluntary contribution in 總自願性供款額: \_\_\_\_\_
- b. No. of transaction(s) 交易次數: \_\_\_\_\_
- c. Total withdrawal amount of voluntary contribution 自願性供款提取總額: \_\_\_\_\_
- d. Frequency of withdrawal 提取次數: \_\_\_\_\_

\* The information is required to be reported by the reporting financial institution to the Inland Revenue Department. 這些項目為申報金融/財務機構須向稅務局申報的資料。

1 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 **Please provide your personal mobile phone no. and e-mail address which are exclusively for your own use to ensure that your confidential account and transaction related information are delivered to the mobile phone no. and e-mail address which are only accessible by you.** 請提供你個人專用的流動電話號碼及電郵地址，以確保有關你賬戶及交易的信息被傳送到只能被你接收及開啟的流動電話號碼及電郵地址。

## B. Business information 營業資料

1. Company name (in English) 公司名稱(英文)

2. Organisation type 機構類別

- Sole proprietorship 獨資經營  Partnership 合夥
- Others 其他 (please specify 請註明: \_\_\_\_\_)

3. Job title 工作職位

4. Business/Other registration no. 商業登記/其他註冊證號碼 (please provide a certified true copy of the registration document 請附上註冊證明文件之認證副本)

\_\_\_\_\_

Registration types<sup>3</sup> 註冊證明<sup>3</sup> Registration no. 註冊證號碼

<sup>3</sup> Registration types are listed below 註冊證明類別如下

BR – Business Registration 商業登記  
HK – HKID card 香港身分證  
PS – Passport 護照

5. Business address (in English) 營業地址(英文)

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

6. Nature of business 業務性質

- |                                                                   |                                                                              |
|-------------------------------------------------------------------|------------------------------------------------------------------------------|
| <input type="checkbox"/> Agriculture/Livestock specialties 農業/家畜業 | <input type="checkbox"/> Construction 建築                                     |
| <input type="checkbox"/> Business services 商用服務                   | <input type="checkbox"/> Finance/Insurance 金融/保險                             |
| <input type="checkbox"/> Catering 餐飲業                             | <input type="checkbox"/> Freight transport/Cargo/Couriers 貨運/航運/速遞           |
| <input type="checkbox"/> Communication 通訊                         | <input type="checkbox"/> Import/Export traders 出入口貿易                         |
| <input type="checkbox"/> Education 教育                             | <input type="checkbox"/> Jewellery/Precious metals/Art dealers 珠寶/貴金屬/藝術品經銷商 |
| <input type="checkbox"/> Hotel/Boarding houses 酒店/旅館              | <input type="checkbox"/> Pharmaceutical industry 藥業                          |
| <input type="checkbox"/> Personal/Household services 個人/家庭服務      | <input type="checkbox"/> Real estate 地產                                      |
| <input type="checkbox"/> Others 其他 (please specify 請註明: _____)    | <input type="checkbox"/> Sales/Rental of vehicles & equipment 車輛及相關設備銷售/租借   |
|                                                                   | <input type="checkbox"/> Textile business 紡織業                                |

7. Annual income (HKD) 每年收入(港幣) (including bonus, commissions, etc. 實際收入包括獎金、佣金等)

HKD 港幣 \_\_\_\_\_ 元

**C. Chinese details 中文資料 (Complete this section if you have selected Chinese as your preferred language 如你選擇以中文為通訊語言，才須填寫此欄)**

<p>1. 姓名</p> <p><input type="checkbox"/> 先生 <input type="checkbox"/> 女士</p> <p style="text-align: center;">姓名</p>	<p>2. 過往中文全名(如法定名稱在過去5年內曾經改變)</p> <p style="text-align: center;">姓名</p>
<p>3. 住宅地址(大部分時間居住在這個主要地址)(請確保於A7欄目填寫英文地址)</p> <p>室 樓 座 大廈名稱</p> <p>屋邨名稱 門牌號碼及街道名稱</p> <p>地區/郵政編號 <input type="checkbox"/> 香港 <input type="checkbox"/> 九龍 <input type="checkbox"/> 新界 <input type="checkbox"/> 其他 城市* 國家/地區*</p>	
<p>4. 營業地址(請確保於B5欄目填寫英文地址)</p> <p>室 樓 座 大廈名稱</p> <p>屋邨名稱 門牌號碼及街道名稱</p> <p>地區/郵政編號 <input type="checkbox"/> 香港 <input type="checkbox"/> 九龍 <input type="checkbox"/> 新界 <input type="checkbox"/> 其他 城市 國家/地區</p>	

\* The information is required to be reported by the reporting financial institution to the Inland Revenue Department. 這些項目為申報金融/財務機構須向稅務局申報的資料。

**D. Mandatory contributions 強制性供款**

<p>1. Relevant income 有關入息</p> <p>HKD 港幣 _____ 元</p> <p>If your relevant income is below the maximum level of relevant income, please provide your most recent notice of assessment. If you cannot provide this notice and/or you would like to make mandatory contributions based on the maximum level of relevant income, please also complete Section I of this form. 如你的有關入息低於最高有關入息水平，請提交你最近期的評稅通知書。如你未能提供此通知書，及/或你欲根據最高有關入息水平作出強制性供款，請同時填寫本表格I部。</p>	<p>2. Period for which the relevant income applies 有關入息涵蓋之期間</p> <p style="text-align: center;">             _____              Year 年      Month 月      Day 日              to 至              _____              Year 年      Month 月      Day 日         </p>
<p>3. Payment frequency 供款周期 (If you elect to make your contributions by direct debit, please complete Section J 'Direct debit authorisation'. 如你選擇以直接付款作出供款，請填寫J部「直接付款授權書」。)</p> <p><input type="checkbox"/> Annually 每年 (i.e. Contribution period is from 1 July to 30 June of each year 即供款期由每年7月1日至6月30日)</p> <p><input type="checkbox"/> Monthly 每月 (i.e. Contribution period is from the first day to the last day of each calendar month and contribution day will be set as the last day of each calendar month 即供款期由每個公曆月的首日至最後一日及供款日將為每月的最後一天)</p> <ul style="list-style-type: none"> <li>• If the contribution day is a Saturday, a public holiday, a gale warning day or a black rainstorm warning day, then it shall mean the next following calendar day which is not a Saturday, a public holiday, a gale warning day or a black rainstorm warning day. 如供款日為星期六、公眾假日、烈風警告日或黑色暴雨警告日，則指隨後非星期六、公眾假日、烈風警告日或黑色暴雨警告日之曆日。</li> <li>• If you wish to specify another day as your contribution period. Please contact our HSBC MPF Member Hotline 3128 0128 for assistance. 如欲指定其他日子作為供款期，請致電我們的滙豐強積金成員熱線3128 0128查詢。</li> </ul>	
<p>4. Do you want to receive the preprinted paper remittance statement in future 你是否希望於日後收到郵寄預印付款結算書? <input type="checkbox"/> Yes 是 <input type="checkbox"/> No 否</p> <ul style="list-style-type: none"> <li>• If yes, The Hongkong and Shanghai Banking Corporation Limited will normally send you a remittance statement around 15 days before the end of contribution period, please refer to the instruction on the remittance statement to settle the contribution. 如是，香港上海滙豐銀行有限公司一般會於供款期結束前約15天寄出付款結算書，請參考付款結算書上的指示繳付供款。</li> </ul>	
<p>5. Payment method 付款方法</p> <p><input type="checkbox"/> By Cheque 支票 (Not applicable for online remittances and file interface arrangement 不適用於網上供款及檔案銜接安排)</p> <p><input type="checkbox"/> By Direct Debit 直接支賬 (please complete Section J 'Direct debit authorisation' 請填寫J部「直接付款授權書」)</p>	

6. Any third parties contributions over HKD78,000 per month to your HSBC MPF account(s) 第三供款者提供每月多於港幣78,000元予你的滙豐強積金賬戶

No 否

Yes, please list out information of your contributor in part (a) (If your contributor is a corporate entity, please complete part (b)): 是，請在(a)項列出該資助人士的資料(如該資助人士屬於法人團體，請填寫(b)項)：

(a) Surname (in English) 姓(英文姓氏)： \_\_\_\_\_

Given name (in English) 名(英文姓名)： \_\_\_\_\_

Previous name 過往名稱  
\_\_\_\_\_

Date of birth 出生日期 (DD/MM/YYYY)： \_\_\_\_\_

Does the contributor have multiple nationalities (country/region)? 資助人士是否持有多重國籍(國家/地區)?  Yes 是  No 否

Nationality (Country/Region) 1 國籍(國家/地區)1： \_\_\_\_\_

Nationality (Country/Region) 2 國籍(國家/地區)2 (if any 如有)： \_\_\_\_\_

Residential address 住宅地址 (The main address the majority of the time is spent or resided 大部分時間居住在這個主要地址)  
(Please complete in English 請以英文填寫)：  
\_\_\_\_\_  
\_\_\_\_\_

(b) Full name of company 公司全名： \_\_\_\_\_

Trading as name(s) 營業名稱： \_\_\_\_\_

Country/Region of incorporation/registration 註冊/登記國家/地區： \_\_\_\_\_

Registered office address in country/region of incorporation 註冊國家/地區的註冊辦事處地址： \_\_\_\_\_

Principal place of business (if different to registered address) 主要業務所在地 (如與註冊辦事處地址不同)： \_\_\_\_\_

Listing on stock exchange 上市公司：

Yes 是 (please specify the name of stock exchange 請註明交易所名稱)： \_\_\_\_\_

No 否

### E. Additional voluntary contributions 自願性供款

Do you want to make additional voluntary contributions? 你是否作出自願性供款?

No (Please go to Section F) 否 (請填寫F部)

Yes (Please complete the details below according to your payment frequency stated in Section D3.) 是 (請根據你於D3欄所選擇的供款周期填寫以下資料。)

#### Monthly 每月

#### Annually 每年

(Please complete Section J 'Direct debit authorisation' in order to set up your direct debit instruction 請填寫J部「直接付款授權書」以設立直接付款指示)

Fixed amount per month 每月固定金額 HKD 港幣 \_\_\_\_\_ 元  
(minimum voluntary amount is **HKD300 per month** 最低自願性供款額為 **每月港幣300元**)

- Payment for monthly voluntary contributions must be made by direct debit, together with the mandatory contributions on the last day of each calendar month. 每月自願性供款須以直接付款方式支付，並連同強制性供款於每月的最後一天扣除。
- If you wish to specify another day as your contribution period. Please contact our HSBC MPF Member Hotline 3128 0128 for assistance. 如欲指定其他日子作為供款期，請致電我們的滙豐強積金成員熱線3128 0128查詢。

Fixed amount per annum 每年固定金額 HKD 港幣 \_\_\_\_\_ 元  
(minimum voluntary amount is **HKD1,000 per year** 最低自願性供款額為 **每年港幣1,000元**)

- Payment for annually voluntary contributions must be made by direct debit, together with the mandatory contributions by end of June each year. 每年自願性供款須以直接付款方式支付，並連同強制性供款於每年的六月尾扣除。

## F. Initial investment option 首次投資選擇

Please make **ONE** choice below and tick ✓ the appropriate box. If you do not wish to make a fund choice, or if this section is left blank, your contributions will be invested in accordance with the DIS, then the DIS will be effected automatically. 請作出下列其中一項選擇，並於適當的方格內加上「✓」號。如你不打算作出基金選擇，或如留空此部分，你的供款將會按照「預設投資策略」來作出投資，因此「預設投資策略」將自動生效。

### (I) DIS 「預設投資策略」

Your future contributions and accrued benefits transferred from another Registered Scheme<sup>4</sup> will be invested in accordance with the DIS. Please refer to the 'MPF Scheme Brochure' for details. 你的未來供款及轉移自另一註冊計劃的累算權益<sup>4</sup>將會按照「預設投資策略」來作出投資。詳情請參閱「強積金計劃說明書」。

Name of Constituent Fund 成分基金名稱	Type of fund 基金類別	Fund Code 基金代號	Investment allocation percentage 投資分布百分比
Core Accumulation Fund 核心累積基金	Mixed Assets Fund 混合資產基金	CAF	100%
Age 65 Plus Fund 65歲後基金	Mixed Assets Fund 混合資產基金	APF	The DIS is invested in the Core Accumulation Fund and the Age 65 Plus Fund according to the pre-set allocation percentages at different ages and will adjust risk by way of reducing the holding in the Core Accumulation Fund and increasing the holding in the Age 65 Plus Fund when the member gets older. For more details on de-risking of the DIS, please refer to the 'MPF Scheme Brochure'. 「預設投資策略」透過於不同年齡按照預定配置百分比來投資於核心累積基金與65歲後基金及會隨著成員年齡增長以減持核心累積基金及增持65歲後基金來調整風險。有關「預設投資策略」降低風險機制的詳情，可參閱「強積金計劃說明書」。

Or 或

### (II) Own investment option 自選投資組合

Please indicate which of the following Constituent Fund(s) you would like your future contributions and accrued benefits transferred from another Registered Scheme<sup>4</sup> under SuperTrust Plus be invested. The investment allocation percentages should be in whole numbers (e.g. 50% not 50.5%) and the total should be 100%. If the total allocation is not 100%, your contributions will be invested in accordance with the DIS. 請指示如何把未來供款及轉移自另一註冊計劃的累算權益<sup>4</sup>分配至下列智選計劃的成分基金內。投資分布百分比必須為整數(例如：須為50%而非50.5%)及其總和必須為100%。如分布總和不等於100%，你的供款將會按照「預設投資策略」來作出投資。

Name of Constituent Fund 成分基金名稱	Type of fund 基金類別	Fund code 基金代號	Investment allocation percentage 投資分布百分比 (Please counter-sign for any amendments made. 如有任何更改，請在旁加簽作實。)
MPF Conservative Fund 強積金保守基金	Money Market Fund 貨幣市場基金	CPF	%
Global Bond Fund 環球債券基金	Bond Fund 債券基金	GBF	%
Guaranteed Fund <sup>5</sup> 保證基金 <sup>5</sup>	Guaranteed Fund 保證基金	GTF	%
Age 65 Plus Fund <sup>6</sup> 65歲後基金 <sup>6</sup> (without de-risking nature 沒有風險降低特性)	Mixed Assets Fund 混合資產基金	FMF	%
Core Accumulation Fund <sup>6</sup> 核心累積基金 <sup>6</sup> (without de-risking nature 沒有風險降低特性)	Mixed Assets Fund 混合資產基金	SGF	%
Stable Fund 平穩基金	Mixed Assets Fund 混合資產基金	SBF	%
Balanced Fund 均衡基金	Mixed Assets Fund 混合資產基金	BLF	%
Growth Fund 增長基金	Mixed Assets Fund 混合資產基金	GRF	%
Global Equity Fund 環球股票基金	Equity Fund 股票基金	GEF	%
North American Equity Fund 北美股票基金	Equity Fund 股票基金	NAEF	%
European Equity Fund 歐洲股票基金	Equity Fund 股票基金	EUEF	%
Asia Pacific Equity Fund 亞太股票基金	Equity Fund 股票基金	ANEF	%
Hong Kong and Chinese Equity Fund 中港股票基金	Equity Fund 股票基金	HKEF	%
Chinese Equity Fund 中國股票基金	Equity Fund 股票基金	CNEF	%
ValueChoice Balanced Fund 智優逸均衡基金	Mixed Assets Fund 混合資產基金	VBLF	%
ValueChoice North America Equity Tracker Fund 智優逸北美股票追蹤指數基金	Equity Fund 股票基金	VUEF	%
ValueChoice Europe Equity Tracker Fund 智優逸歐洲股票追蹤指數基金	Equity Fund 股票基金	VEEF	%
ValueChoice Asia Pacific Equity Tracker Fund 智優逸亞太股票追蹤指數基金	Equity Fund 股票基金	VAEF	%
Hang Seng China Enterprises Index Tracking Fund 恒生中國企業指數基金	Equity Fund 股票基金	HSHF	%
Hang Seng Index Tracking Fund 恒指基金	Equity Fund 股票基金	HSIF	%
Total 總和			100%

<sup>4</sup> If the asset is transferred from one account to another account or a personal account within the same HSBC MPF scheme, the fund allocation (i.e. units under respective Constituent Funds) of such asset will remain unchanged until asset switching instruction is received from you. 如將資產由一個滙豐強積金計劃賬戶轉移至同一計劃的另一個賬戶或個人賬戶，該筆資產的基金分布(即各成分基金單位)將維持不變，直至你另行作出基金調配指示為止。

<sup>5</sup> For information about the Guaranteed Interest Rate, please visit [www.hsbc.com.hk/mpf](http://www.hsbc.com.hk/mpf) or call our Customer Service Representative on 3128 0128. 查詢保證利率詳情，請瀏覽 [www.hsbc.com.hk/mpf](http://www.hsbc.com.hk/mpf)，或致電 3128 0128 聯絡我們的客戶服務主任。

<sup>6</sup> If you choose to invest in the Core Accumulation Fund and/or the Age 65 Plus Fund (as a standalone investment fund rather than as part of the DIS), those investments will not be subject to the de-risking process. 若你選擇投資於核心累積基金及/或65歲後基金(作為單獨投資基金而非「預設投資策略」)，該等投資將不會遵從降低風險程序。

## G. Tax Residency Self-Certification (Mandatory) 稅務居民自我證明(必須填寫)

Please read the following instructions before completing this section 請在填寫本部分前細閱以下指示：

### Why are we asking you to complete this section? 為何我們要求你填寫本部分？

To help protect the integrity of tax systems, governments around the world are introducing a new information-gathering and reporting requirement for financial institutions. This is known as the Common Reporting Standard (the “CRS”). 為維護稅制完整，全球各地政府現正推出適用於金融／財務機構的資料收集及匯報新規例，名為共同匯報標準(簡稱[CRS])。

Under the CRS, we are required to determine where you are a “tax resident” (this will usually be where you are liable to pay income taxes). If you are a tax resident outside the jurisdiction where your account is held, we may need to give the national tax authority this information, along with information relating to your accounts. That may then be shared between different jurisdictions’ tax authorities. 根據CRS規定，我們必須確定你的「稅務居住地」(這通常是你有義務繳納薪俸稅的國家／地區)。若你的稅務居住地有別於所持賬戶的司法管轄區，我們可能需要將此情況及你的有關賬戶資料告知國家／地區稅務機關，該等機關隨後或會將相關資料傳送給不同國家／地區的稅務機關。

Completing this section will ensure that we hold accurate and up to date information about your tax residency. 填寫本部分可確保我們持有你正確及最新的稅務居住地資料。

If your circumstances change and any of the information provided in this section becomes incorrect, please let us know immediately and provide an updated ‘Individual Tax Residency Self-Certification Form (CRS-I (HK)-MPF)’. 如你的情況有變，導致本部分內的任何資料不再正確，請立即告知我們，並提交一份已更新的「個人稅務居民自我證明表格(CRS-I (HK)-MPF)」。

### Where to go for further information? 如何獲取更多資訊？

If you have any questions about this section, please call our MPF hotline 2583 8033 (Employer) or 3128 0128 (Member). 如對本部分有任何疑問，請致電我們的強積金熱線2583 8033(僱主)或3128 0128(成員)。

The Organisation for Economic Co-operation and Development (“OECD”) has developed the rules to be used by all governments participating in the CRS and these can be found on the OECD’s Automatic Exchange of Information (“AEOI”) website, [www.oecd.org/tax/automatic-exchange/](http://www.oecd.org/tax/automatic-exchange/). 經濟合作與發展組織(簡稱「經合組織」)已制訂規則，供參與CRS的所有政府使用，並載於經合組織的自動交換資料(簡稱[AEOI])網站[www.oecd.org/tax/automatic-exchange/](http://www.oecd.org/tax/automatic-exchange/)。

Please also visit the website of the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region that sets out information relating to the implementation of AEOI in Hong Kong: [www.ird.gov.hk/eng/tax/dta\\_aeoi.htm](http://www.ird.gov.hk/eng/tax/dta_aeoi.htm). Meaning of terms and expressions used in this form (e.g. “account holder” and “reportable account”) may be found under Section 50A of the Inland Revenue Ordinance (Cap. 112). 另請參閱香港特別行政區政府稅務局(簡稱「稅務局」)的網站了解香港實施AEOI的詳情：[www.ird.gov.hk/chi/tax/dta\\_aeoi.htm](http://www.ird.gov.hk/chi/tax/dta_aeoi.htm)。有關本表格內所用詞彙的涵義(例如：「賬戶持有人」和「須申報賬戶」)，請參閱《稅務條例》(第112章)第50A條。

If you have any questions on how to define your tax residency status, please visit the OECD website, [www.oecd.org/tax/automatic-exchange/](http://www.oecd.org/tax/automatic-exchange/) or speak to your tax advisor as we are not allowed to give tax advice. 如你對判定你的稅務居民身分有任何疑問，請瀏覽經合組織網站[www.oecd.org/tax/automatic-exchange/](http://www.oecd.org/tax/automatic-exchange/)或諮詢你的稅務顧問。請恕我們不能提供稅務意見。

### Important Notes 重要提示：

- This is a self-certification provided by an account holder to a reporting financial institution for the purpose of automatic exchange of financial account information. The data collected may be transmitted by the reporting financial institution to the Inland Revenue Department for transfer to the tax authority of another jurisdiction. 這是由賬戶持有人向申報金融／財務機構提供的自我證明，以作自動交換財務賬戶資料用途。申報金融／財務機構可把收集所得的資料交給稅務局，稅務局會將資料轉交到另一稅務管轄區的稅務當局。
- An account holder should report all changes in his/her tax residency status to the reporting financial institution. 如賬戶持有人的稅務居民身分有所改變，應盡快將所有變更通知申報金融／財務機構。
- If space provided is insufficient, continue on additional sheet(s). Information in Section A, C & G marked with an asterisk (\*) are required to be reported by the reporting financial institution to the Inland Revenue Department. 如空位不夠應用，可另紙填寫。在A部、C部及G部標有星號(\*)的項目為申報金融／財務機構須向稅務局申報的資料。

**G. Tax Residency Self-Certification (Mandatory) (cont'd) 稅務居民自我證明(必須填寫)(續)**

(1) My Tax Residence is Hong Kong ONLY, with no tax residence in any other jurisdictions/countries/regions AND my HKID number is my TIN. 本人之稅務居住地只有香港，及沒有處於任何其他司法管轄區／國家／地區的稅務居住地而本人的香港身分證號碼是本人的稅務編號。

- Yes 是 (you may skip (2). 你可略過第(2)部分。)
- No 否 (please complete (2). 請填寫第(2)部分。)

(2) Complete the following table indicating 提供以下資料，列明：

- (a) **all jurisdictions** where the account holder is a **resident for tax purposes**; and 賬戶持有人作為**稅務居民的所有司法管轄區**；及
- (b) the account holder's TIN for each jurisdiction indicated. 該稅務管轄區發給賬戶持有人的稅務編號。

If the account holder is a tax resident of Hong Kong, the TIN is the Hong Kong Identity Card Number (HKID). 如賬戶持有人是香港稅務居民，稅務編號是賬戶持有人的香港身分證號碼。

If a TIN is unavailable, provide the appropriate reason **A, B or C** 如沒有提供稅務編號，必須填寫合適的理由：

- # **Reason A** - The jurisdiction where the account holder is a resident for tax purposes does not issue TINs to its residents.  
**理由A** - 賬戶持有人的稅務管轄區並沒有向其居民發出稅務編號。
- Reason B** - The account holder is unable to obtain a TIN. Explain why the account holder is unable to obtain a TIN if you have selected this reason.  
**理由B** - 賬戶持有人不能取得稅務編號。如選取這一理由，解釋賬戶持有人不能取得稅務編號的原因。
- Reason C** - TIN is not required. Select this reason only if the authorities of the jurisdiction of tax residence do not require the TIN to be disclosed.  
**理由C** - 賬戶持有人毋須提供稅務編號。稅務管轄區的主管機關不需要賬戶持有人披露稅務編號。

	Jurisdiction of Tax Residence* 稅務管轄區*	TIN* 稅務編號*	#Enter Reason A, B or C if no TIN is available 如沒有提供稅務編號，填寫理由A、B或C	Explain why the account holder is unable to obtain a TIN if you have selected Reason B 如選取理由B，解釋賬戶持有人不能取得稅務編號的原因
1				
2				
3				
4				
5				



## H. Declaration and authorisation 聲明及授權書

1. **Participation** — by signing this form, I **參加計劃** — 在簽署本表格後，本人：
  - a. understand that I am entering into a legally binding agreement with the Trustee to participate in and contribute to SuperTrust Plus with effect from the scheme commencement date, and 明白已跟信託人簽訂具法律約束力的協議，以參加智選計劃，由計劃開展日起生效，並向有關計劃供款，及
  - b. undertake to the Trustee to comply with any requirement imposed on a self-employed person and, as specified in the documentation governing the Master Trust (a copy of which is available on request from the Administrator, The Hongkong and Shanghai Banking Corporation Limited) and in the MPF Scheme Brochure, and 向信託人承諾遵守任何有關自僱人士及在規管集成信託計劃的文件(可向行政管理人：香港上海滙豐銀行有限公司索取)及強積金計劃說明書內列明的規定，及
  - c. undertake to provide the Trustee in an expeditious manner with such full and accurate information as the Trustee may reasonably request and rely on in order to enable it to comply with the MPF legislation or the terms of the documentation governing SuperTrust Plus, and 承諾盡快向信託人按其合理要求提供作為依據的全部和準確資料，以便信託人遵行強積金法例或規管智選計劃的文件所載的條款，及
  - d. have read and understood the personal information collection statement below, and 已細閱及明白以下收集個人資料聲明，及
  - e. acknowledge and agree that (i) the information contained in this form is collected and may be kept by HSBC Provident Fund Trustee (Hong Kong) Limited (the "Trustee") for the purpose of automatic exchange of financial account information, and (ii) such information and information regarding the account holder and any reportable account(s) may be reported by the Trustee to the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region and exchanged with the tax authorities of another jurisdiction(s) in which the account holder may be resident for tax purposes, pursuant to the legal provisions for exchange of financial account information provided under the Inland Revenue Ordinance (Cap.112), and 知悉及同意，HSBC Provident Fund Trustee (Hong Kong) Limited (「信託人」)可根據《稅務條例》(第112章)有關交換財務賬戶資料的法律條文，(i)收集本表格所載資料並可備存作自動交換財務賬戶資料用途及(ii)把該等資料和關於賬戶持有人及任何須申報賬戶的資料向香港特別行政區政府稅務局申報，從而把資料轉交到賬戶持有人的稅務管轄區的稅務當局，及
  - f. undertake to advise the Trustee of any change in circumstances which affects the tax residency status of the individual identified in Section A of this form or causes the information contained herein to become incorrect, and to provide the Trustee with a suitably updated 'Individual Tax Residency Self-Certification Form (CRS-I (HK)-MPF)' within 30 days of such change in circumstances, and 承諾，如情況有所改變，以致影響本表格A部所述的個人的稅務居民身分，或引致本表格所載的資料不正確，本人會通知信託人，並會在情況發生改變後30日內，向信託人提交一份已適當更新的「個人稅務居民自我證明表格 (CRS-I (HK)-MPF)」，及
  - g. declare that the information given and statements made in this form are, to the best of my knowledge and belief, true, correct and complete. 聲明就本人所知所信，本表格內所填報的所有資料和聲明均屬真實、正確和完備。
2. **Voluntary contributions** — I understand that if I wish to contribute additional amounts to SuperTrust Plus then I must complete Section E of this form. I understand that my investment mandate for mandatory contributions will also be applied to any additional voluntary contributions. **自願性供款** — 本人明白如欲向智選計劃作出自願性供款，必須填妥本表格E部。本人並明白本人的強制性供款投資授權亦適用於本人的自願性供款。
3. **Declaration** — I declare that I have received and read the MPF Scheme Brochure in respect of the SuperTrust Plus. **聲明** — 本人謹此聲明已收到並細閱有關智選計劃的強積金計劃說明書。

### Personal information collection statement 收集個人資料聲明

1. The personal data provided by Participating Employers and/or Members and details of transactions or dealings by such Participating Employers and/or Members from time to time may be used for one or more of the following purposes: - (i) the administration and/or management of or in connection with the contributions or accrued benefits or MPF account in respect of the Participating Employers and/or Members under the HSBC MPF scheme and Hang Seng MPF scheme administered by the HSBC Group; (ii) conducting direct marketing activities of MPF products and/or MPF 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 MPF products and/or MPF services (including through customer research or surveys) by entities of the HSBC Group, subject to applicable MPF legislation; (iv) matching for MPF related purpose with other personal data concerning the relevant Participating Employers 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 guidelines, guidance or requests given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information. 不時由參與僱主及／或成員所提供的個人資料及該等參與僱主及／或成員的交易或事務往來的詳情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強積金計劃及恒生強積金計劃下與參與僱主及／或成員的供款或累算權益或強積金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強積金產品及／或強積金服務的直接或有關促銷活動；(iii)在適用的強積金法例規限下，改善及進一步提供由滙豐集團成員所提供的強積金產品及／或強積金服務(包括透過客戶研究或調查)；(iv)為任何強積金相關的用途而核對相關參與僱主及／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。
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 and/or Member will be kept confidential but 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 in any jurisdiction; (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 MPF business; (iii) relevant Participating Employers; (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及／或成員的個人資料將予保密，但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)任何司法管轄區的監管機構或政府機關；(ii)任何提供與營運我們的強積金業務有關的行政、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；(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。

## H. Declaration and authorisation (cont'd) 聲明及授權書(續)

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 Provident Fund Trustee (Hong Kong) Limited, c/o The Hongkong and Shanghai Banking Corporation Limited, PO Box 73770, Kowloon Central Post Office. 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73770號(c/o香港上海滙豐銀行有限公司)，向HSBC Provident Fund Trustee (Hong Kong) Limited資料保障主任提出要求。
5. We, entities of the HSBC Group, intend to use your personal data in direct marketing of MPF products and/or MPF services, and we require your consent (which includes an indication of no objection) for that purpose. In this connection, please note that 我們，滙豐集團成員，擬把你的個人資料用於強積金產品及／或強積金服務的直接促銷，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 MPF products and/or MPF 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強積金產品及／或強積金服務。

If you do not wish us to use your personal data in direct marketing as described above, you may exercise your opt-out right by notifying us. 如你不希望我們如上述使用你的個人資料作直接促銷用途，你可通知我們行使你的選擇權拒絕促銷。

Please tick if you do not wish your personal data to be used for purpose of conducting direct marketing activities stated in paragraph 5 above. 如你不希望你的個人資料被用於上述第5段所列明的直接促銷活動，請在方格內填上剔號。

The above represents your present choice whether or not to receive direct marketing contact or information. This replaces any choice communicated by you to us prior to this application. Please note that you can change your marketing preference anytime to receive our best offers and promotions. 以上代表你目前就是否希望收到直接促銷聯繫或資訊的選擇，並取代你於本申請前向我們傳達的任何選擇。請注意：接收推廣資訊喜好設定可隨時作出變更，從而接收我們的精彩優惠及推廣資訊。

**X**

Signature 簽署

Full name 全名

Date 日期

(This signature will be used to verify your future correspondence to us. 此簽署式樣將用於核對你日後給予我們的文件。)

**WARNING: It is a serious offence under the Inland Revenue Ordinance if any person, in making a self-certification, makes a statement that is misleading, false or incorrect in a material particular AND knows, or is reckless as to whether, the statement is misleading, false or incorrect in a material particular. Heavy penalty may apply upon conviction.**

警告：根據《稅務條例》，如任何人在作出自我證明時，在明知一項陳述在要項上屬具誤導性、虛假或不正確，或罔顧一項陳述是否在要項上屬具誤導性、虛假或不正確下，作出該項陳述，即屬嚴重罪行。一經定罪，可致重罰。

<b>For office use only 公司專用</b>	Sales name 1	Ext	Sales staff code 1	BCC	Enrol referral staff code 1	BCC	Ind. code  _ _ _ _
	Sales name 2	Ext	Sales staff code 2	BCC	Enrol referral staff code 2	BCC	
	Sales name 3	Ext	Sales staff code 3	BCC	Enrol referral staff code 3	BCC	

## I. Additional declaration 附加聲明

Please make one of the declarations below 請作出下列其中一項聲明:

Instruction 指示:

### Declaration 1 聲明一:

You should make this declaration if 在下列情況下，你應作此聲明:

- i) your relevant income is below the maximum level of relevant income as set by the MPFA, and 你的有關入息低於積金局所釐定的最高有關入息水平，及
- ii) you satisfy the Trustee that you are unable to provide the Trustee with evidence of your relevant income for the relevant financial period, and 你令信託人信納你不能向信託人提供就有關財政期賺取的有關入息的證據，及
- iii) you wish to make mandatory contributions based on the basic allowance within the meaning of Section 28 of the Inland Revenue Ordinance according to Section 128(2) or Section 128(3) of the Mandatory Provident Fund Scheme (General) Regulation. 你希望根據《強制性公積金計劃(一般)規例》第128條(2)或第128條(3)所述按《稅務條例》第28條所指的基本免稅額計算強制性供款。

### Declaration 2 聲明二:

You should make this declaration if 在下列情況下，你應作此聲明:

- i) you wish to make mandatory contributions based on the maximum relevant income level as set by the MPFA, or 你希望依據積金局所釐定的最高有關入息水平作出供款，或
- ii) you do not produce evidence of relevant income, or 你不出示有關入息的證據，或
- iii) you fail to satisfy the Trustee that you are unable to provide the Trustee with evidence of your relevant income for the relevant financial period. 你沒有令信託人信納你不能向信託人提供就有關財政期賺取的有關入息的證據。

### Declaration 3 聲明三:

You should make this declaration if 在下列情況下，你應作此聲明:

- i) your relevant income is below the maximum level of relevant income as set by the MPFA, and 你的有關入息低於積金局所釐定的最高有關入息水平，及
- ii) either you are unable to produce the most recent notice of assessment or one of the other situations set out in that declaration applies, and 你未能出示最近期評稅通知書或符合此聲明所列載的其中一個情況，及
- iii) you will make mandatory contributions based on the assessable profits for the preceding year of assessment according to Section 127 of the Mandatory Provident Fund Scheme (General) Regulation. 你將根據《強制性公積金計劃(一般)規例》第127條，以你上一個課稅年度應評稅利潤的相等款項計算強制性供款。

Declaration 1 聲明一

I declare that my relevant income within the relevant financial period is below the maximum relevant income level for MPF purposes, and I have satisfied the Trustee that I cannot produce any evidence of my earnings. Thus, my relevant income is deemed to be equal to the basic allowance within the meaning of Section 28 of the Inland Revenue Ordinance according to Section 128(2) or Section 128(3) of the Mandatory Provident Fund Scheme (General) Regulation. 本人現聲明就有關財政期賺取的有關入息低於最高有關入息水平及本人已令信託人信納本人不能出示任何入息的證據。因此，本人將根據《強制性公積金計劃(一般)規例》第128條(2)或第128條(3)所述按《稅務條例》第28條所指的基本免稅額作為本人的有關入息。

Declaration 2 聲明二

I will make the mandatory contribution according to the maximum relevant income level under the Mandatory Provident Fund Schemes Ordinance (Cap. 485). I understand that this maximum level of relevant income prescribed by law is subject to change from time to time. If I still cannot produce evidence of my earnings in the future, I will make mandatory contributions according to the maximum relevant income level under the MPF regulation. 本人將根據《強制性公積金計劃條例》(第485章)所規定的最高有關入息水平作出強制性供款。本人亦明白此最高供款額上限可隨法例更改而不時變動。如本人日後仍未能出示有關入息證據，本人將依據強積金法例所釐定的最高有關入息水平作出供款。

Declaration 3 聲明三

As 由於

- my most recent notice of assessment was issued more than 24 months ago, 本人最近期評稅通知書的發出日期，與本人出示該通知書作為本人的有關入息的證據的日期之間相隔超逾24個月，
- I object to my most recent notice of assessment, 本人反對在最近期通知書內述明的評稅，
- I have appealed against my most recent assessment, 本人已針對最近期評稅提出上訴，
- I am unable to produce my most recent notice of assessment, 本人未能出示最近期評稅通知書，

I declare that the amount of my relevant income within the relevant financial period is equal to my assessable profits for the preceding year of assessment according to Section 127 of the Mandatory Provident Fund Scheme (General) Regulation. 本人現聲明將根據《強制性公積金計劃(一般)規例》第127條所述，按上一個課稅年度應評稅利潤的相等款項，作為本人有關財政期賺取的有關入息。

**X**

Signature 簽署

Full name 全名

Date 日期

## J. Direct debit authorisation 直接付款授權書

Name of party to be credited (The Beneficiary) 收款的一方(受益人)

**HSBC Provident Fund Trustee (Hong Kong) Limited**

I/We hereby authorise my/our below-named Bank to effect transfers from my/our account to that of the above-named beneficiary in accordance with such instructions as my/our Bank may receive from the beneficiary and/or its banker from time to time. 本人(我們)現授權本人(我們)的上述銀行, (根據受益人或其往來銀行不時給予本人(我們)銀行的指示)自本人(我們)的戶口內轉賬予上述受益人。

I/We agree that my/our Bank shall not be obliged to ascertain whether or not notice of any such transfer has been given to me/us. 本人(我們)同意本人(我們)的銀行毋須證實該等轉賬通知是否已交予本人(我們)。

I/We jointly and severally accept full responsibility for any overdraft (or increase in existing overdraft) on my/our account which may arise as a result of any such transfer(s). 如因該等轉賬而令本人(我們)的戶口出現透支(或令現時的透支增加), 本人(我們)願共同及個別承擔全部責任。

I/We confirm that my/our signature(s) on this authorisation form is/are the same as that/those for the operation of my/our savings/current account to be debited for the transfer. 本人(我們)確認, 本人(我們)於本授權書上的簽名, 與本人(我們)的儲蓄/往來戶口的簽名完全相同。

I/We agree to notify the above-named beneficiary of any change of bank account or cancellation of payment method and further agree that should there be insufficient funds in my/our account to meet any transfer hereby authorised, my/our Bank shall be entitled, at its discretion, not to effect such transfer in which event the Bank may levy the usual charge to be paid by me/us. 本人(我們)同意給予受益人任何更改銀行戶口或取消付款方法的通知, 並且同意如本人(我們)的戶口並無足夠款項支付該等授權轉賬, 本人(我們)的銀行有權不予轉賬, 且銀行可向本人(我們)收取慣常的費用。

This authorisation shall have effect until further notice. 本授權書將繼續生效直至另行通知為止。

I/We agree that any notice of cancellation or variation of this authorisation which I/we may give to my/our Bank shall be given at least 10 working days prior to the date on which such cancellation/variation is to take effect. 本人(我們)同意, 本人(我們)取消或更改本授權書的任何通知, 須於取消/更改生效日最少10個工作天前交予本人(我們)的銀行。

I/We hereby authorise HSBC Provident Fund Trustee (Hong Kong) Limited, to initiate and arrange for contributions to be debited from my/our bank account according to the following specification, in favour of HSBC Provident Fund Trustee (Hong Kong) Limited. 本人(我們)現授權 HSBC Provident Fund Trustee (Hong Kong) Limited 從本人(我們)上述銀行的戶口內, 提出及安排扣除供款, 以支付予 HSBC Provident Fund Trustee (Hong Kong) Limited。

1. Bank and branch name 銀行及分行名稱		
Bank no. 銀行編號	Branch no. 分行編號	Account no. to be debited 扣款戶口號碼 (Please specify account suffix number for integrated account. 如戶口屬於綜合理財戶口, 請註明戶口字尾號碼。)
2. Details of account holder as on Statement/Passbook 戶口持有人於結單/存摺上的資料紀錄 (If you are in doubt, please contact your respective Bank. 如有疑問, 請聯絡你的相關銀行。)		
Name of account holder* 戶口持有人姓名*		Signature of account holder 戶口持有人簽署
Identification number 身分證明文件號碼 <input type="checkbox"/> HKID Card No. 香港身分證號碼 _____ ( ) <input type="checkbox"/> Passport No. 護照號碼 _____ <input checked="" type="checkbox"/> Business Registration 商業登記 _____ <b>X</b> <input type="checkbox"/> Certificate of Incorporation 公司註冊證書 _____ <input type="checkbox"/> Others 其他 (Please specify 請註明) _____		Date 日期
3. Please provide joint account holder's details (if applicable) 請填寫聯名戶口持有人資料(如適用)		
Name of joint account holder 聯名戶口持有人姓名		Signature of joint account holder 聯名戶口持有人簽署
Identification number 身分證明文件號碼 <input type="checkbox"/> HKID Card No. 香港身分證號碼 _____ ( ) <input type="checkbox"/> Passport No. 護照號碼 _____ <input checked="" type="checkbox"/> Business Registration 商業登記 _____ <b>X</b> <input type="checkbox"/> Certificate of Incorporation 公司註冊證書 _____ <input type="checkbox"/> Others 其他 (Please specify 請註明) _____		Date 日期

\* If not same as the name registered for the MPF scheme, please provide the relevant documents. 如與強積金計劃所登記的姓名不同, 請提供相關文件。

Please note that it may take 4 to 6 weeks for processing your application. Please therefore continue to make your contributions by cheque until you have received a confirmation that your direct debit instruction has been successfully setup. 請注意申請此項服務約需時四至六星期。因此, 你在仍未收到設立直接付款確認書前, 請繼續以支票方式繳付供款。

Please ensure sufficient funds are available in the above bank account **three working days before contribution day**. 請你緊記於 **供款日的3個工作天前**, 將足夠供款存入上述的銀行戶口。