

Scheme Member's Request for Fund Transfer Form (Sample) 計劃成員資金轉移申請表(樣本)

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



SCHEME MEMBER'S REQUEST FOR FUND TRANSFER FORM (for self-employed person, personal account holder or employee ceasing employment) 計劃成員資金轉移申請表(適用於自僱人士、個人賬戶持有人或終止受僱的僱員)

Sections 145, 146, 147, 148 and 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)
《強制性公積金計劃(一般)規例》(《第485A章》)第145、146、147、148及149條

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 **Notes to Transfer of MPF Accrued Benefits (Benefits by Scheme Member and Explanatory Notes)** carefully before completing this Form. 填寫本表格前，請先細閱**計劃成員轉移強積金累算權益(權益)須知及註釋**。
- The personal data to be supplied in support of this election of transfer are to be used for processing your election of transfer. The personal data you supply may, for such purpose, be transferred to the trustee(s) concerned, the relevant service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority (MPFA). 你就此項轉移申請提供的個人資料，將用作處理你的轉移申請。你提供的個人資料可能會為該目的而轉交相關受託人、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(積金局)。
- Please provide a certified true copy of your HKID card, if such document(s) have not been previously provided or if there has been any change to any information contained in such document(s). If you are NOT a holder of a HKID card, please provide a certified true copy of your passport. (Applicable for electing to transfer-out the benefits from HSBC MPF scheme) 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。(適用於選擇把滙豐強積金計劃內的權益轉出)
- 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份。查詢指定滙豐分行詳情，請瀏覽 www.hsbc.com.hk/mpf。
- '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。
- For an employee who has ceased employment, wishes to transfer the benefits from the employee's MPF contribution account, the employer's written notification of the employee's cessation of employment to the original trustee is required. If the employer fails to do so, the transfer processing in respect of the respective 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. 若已離職的僱員打算轉移有關之強積金供款賬戶中的權益，有關之僱主必須向原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個別強積金賬戶之轉移可能會延遲處理，直至滙豐強積金計劃行政人員收到離職通知書或其他相關文件。
- Please note that if any of your change of investment instruction is scheduled on any day that the transfer of benefits of the MPF account(s) as stated in this Form is to be processed, your change of investment instruction will not be processed if your MPF account(s) will be terminated after the transfer 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期為本表格所述強積金賬戶的權益轉移的執行日，而你的強積金賬戶於完成轉移權益後終止，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。
- If there is any new contribution or transfer in amount received under your HSBC MPF account, your request for fund transfer out (if applicable) 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，你的轉出要求(如適用)將會在有關供款或轉移金額完成認購投資後才獲處理。
- (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。
- 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。

SECTION I – SCHEME MEMBER'S DETAILS 第 I 部 – 計劃成員資料

(1) Full name 全名 (same as that shown on your HKID card ^{Note 1} 與你的香港身分證上的姓名相同^{註1})

CHAN **CHI KEUNG**
Surname 姓氏 Given name 名字

(2) Identification 身分證明 **A234567 (8)** Passport number 護照號碼
HKID Card number 香港身分證號碼 (ONLY for scheme member without HKID Card 本欄僅適用於沒有香港身分證的計劃成員填寫)

(3) Correspondence address¹ 通訊地址¹

A **1** **A** **SUN BUILDING**
Room/Flat 室 Floor 樓 Block 座 Name of building 大廈名稱

MOON ESTATE **8 SUN STREET**
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

(4) Contact details¹ 聯絡資料¹

Country/Region code 國家/區域編號 Area code 地區號碼 Phone no. 電話號碼
Day time contact no.² 日間聯絡電話² **2123 4567**
Mobile phone no.² 流動電話號碼² **9876 5432**
Email address (if any) 電郵地址 (如有) **ABC@ABC.COM**

¹ After verifying the signature provided in this transfer form, the correspondence address and contact details will be updated accordingly for the scheme member's other relevant MPF scheme accounts under HSBC MPF for future correspondence. The transfer statement and cheque (if any) related to this transfer request will be sent to this correspondence address after completion of this transfer request. If you are also a user of a HSBC Personal Internet Banking service solely for your participation in HSBC MPF scheme without having a bank account with HSBC ("MPF only PIB"), please provide an English address in this form, otherwise your MPF only PIB service should you request for a security device or regeneration of Personal Identification Number (PIN) may be affected. 核實你在此轉移表格所提供的簽署後，此通訊地址及聯絡資料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。當此表格之轉移完成處理後，有關轉移表格及支票(如有)將會寄往此通訊地址。如你同時是滙豐個人網上理財用戶(僅參與滙豐強積金計劃而沒有滙豐銀行賬戶)，請在本表格提供英文地址，否則你的滙豐個人網上理財服務(僅限強積金)可能會因你要求提供保安攝碼器或重新發出的密碼而將會受到影響。

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。

SECTION II – TRANSFER INFORMATION 第 II 部 – 轉移資料

(5) MPF account information in the original scheme 原計劃的強積金賬戶資料：

Name of original trustee ^{Note 2} 原受託人名稱^{註2} : **ABC Trustee**
Name of original scheme ^{Note 2} 原計劃名稱^{註2} : **XYZ Scheme**

Type of MPF account (please select ONE of the following accounts and ✓ as appropriate):
強積金賬戶類別(請選擇以下其中一個賬戶，並於適當的方格內填上[✓]號)：

Personal account 個人賬戶 OR 或 Contribution account 供款賬戶

Scheme member's account number ^{Note 2} 計劃成員賬戶號碼^{註2}
(Scheme ID 計劃編號) : **61111111**

(MPF membership number 強積金成員編號) : **51111111**

(6) Details of former employment 以往受僱詳情 (applicable for employee who wishes to transfer-out the benefits from a contribution account after cessation of employment 適用於僱員在終止受僱後欲把供款賬戶內的權益轉出)

Name of former employer 前任僱主名稱 : **XYZ COMPANY**

Employer's identification number ^{Note 3} 僱主的識別號碼^{註3}
(Employer ID 僱主編號) : **81111111**

(7) Details of self-employed status 自僱人士身分詳情 (applicable for self-employed person only 只適用於自僱人士)

Please indicate your reason of transfer and ✓ as appropriate 請於適當的方格內填上[✓]號，表明申請轉移的原因。

Cessation of self-employment, with effect from 終止自僱，生效日期是： YYYY 年 MM 月 DD 日

I will remain in self-employment and my benefits will be transferred to another scheme stated in section III(B). Contributions to the original scheme should be paid up to 本人將會維持自僱，並把本人的權益轉移至第III部第(B)項所述的另一個計劃。本人向原計劃供款的最後日期是： YYYY 年 MM 月 DD 日

The full name must be the same as that shown on the HKID card/Passport. 全名必須與香港身分證/護照上的姓名相同。

Passport number should be given only if you do not possess HKID card. 在沒有香港身分證情況下方可填寫護照號碼。

Please fill in the personal information of the scheme member. 請填寫計劃成員的個人資料。

Please fill in the MPF account information of the original scheme. Please refer to the notice of participation, annual benefit statement etc. Should there be queries, please enquire with the original trustee. 請填寫原計劃的強積金賬戶資料，有關資料可參閱參與通知、周年權益報表等。如有疑問，可向原受託人查詢。

If you wish to transfer-out the MPF accrued benefits from a contribution account after cessation of employment, please complete this part. 如你欲在終止受僱後把供款賬戶內的強積金累算權益轉出，請填寫此部分。

This part is to be completed by the self-employed person. 此部分供自僱人士填寫。

If personal account is selected, you do not have to fill in the information (6). 如選擇個人賬戶，可省略填寫資料(6)。

Please fill in the Employer ID/Scheme ID of the original scheme. 請填寫原計劃的僱主編號/計劃編號。

SECTION III – TRANSFER OPTIONS ^{Note 8, 9} 第III部 – 轉移選擇 ^{註8, 9}

(8) Mandatory contributions 強制性供款

MPF account information in the new scheme 新計劃的強積金賬戶資料：
I elect to transfer the benefits derived from the mandatory contributions in my account stated in section II(5) to the following account (Please select option (a), (b) OR (c) and ✓ as appropriate) 本人選擇把在第II部第(5)項所述賬戶內由強制性供款所產生的權益轉移至以下賬戶(請選擇(a)、(b)或(c)，並於適當的方格內填上[✓]號)：

(a) To my contribution account with my new employer 轉移至本人新僱主就本人開立的供款賬戶

Name of new trustee ^{Note 4} 新受託人名稱 ^{註4} :	<input checked="" type="checkbox"/> HSBC PROVIDENT FUND TRUSTEE (HONG KONG) LIMITED <input type="checkbox"/> Others, please specify 其他，請註明：
Name of new scheme ^{Note 4} 新計劃名稱 ^{註4} :	<input checked="" type="checkbox"/> HSBC MPF – SuperTrust Plus 滙豐強積金智選計劃 <input type="checkbox"/> Others, please specify 其他，請註明：
Scheme member's account number ^{Note 4} 計劃成員賬戶號碼 ^{註4} : (MPF membership number 強積金成員編號)	41111111
Name of new employer 新僱主名稱 :	ABC COMPANY
Employer's identification number ^{Note 3} 僱主識別號碼 ^{註3} : (Employer ID/Scheme ID 僱主編號/計劃編號)	21111111

(b) To my designated account in the new scheme 轉移至本人新計劃內的指定賬戶

Name of new trustee ^{Note 4} 新受託人名稱 ^{註4} :	<input type="checkbox"/> HSBC PROVIDENT FUND TRUSTEE (HONG KONG) LIMITED <input type="checkbox"/> Others, please specify 其他，請註明：
Name of new scheme ^{Note 4} 新計劃名稱 ^{註4} :	<input type="checkbox"/> HSBC MPF – SuperTrust Plus 滙豐強積金智選計劃 <input type="checkbox"/> Others, please specify 其他，請註明：
Scheme member's account number ^{Note 4} 計劃成員賬戶號碼 ^{註4} : (MPF membership number 強積金成員編號)	
Employer's identification number ^{Note 3} 僱主識別號碼 ^{註3} : (Employer ID/Scheme ID 僱主編號/計劃編號)	

(c) Retained in the original scheme as personal account (where applicable) ^{Note 7} 以個人賬戶形式保留在原計劃(如適用) ^{註7}

(9) Voluntary contributions 自願性供款(not including Flexi-Contributions 不包括靈活供款)

Arrangement of my voluntary contributions ^{Note 5} (if any) in my account stated in section II(5). 有關本人在第II部第(5)項所述賬戶內的自願性供款 ^{註5} (如有)的安排。

Please select option (a) OR (b) and ✓ as appropriate 請選擇(a)或(b)，並於適當的方格內填上[✓]號：

(Remarks: If you do not select any options but there are benefits derived from voluntary contributions, those benefits will be handled in the same way as those stated in section III(8). If there are no such benefits in your account and you have made an election in section III(9), the selected option will not be processed. 備註：如你沒有作出任何選擇，而賬戶內有由自願性供款所產生的權益，則該等權益將以處理第III部第(8)項所述的權益的同樣方式處理。如你已在第III部第(9)項作出選擇，而賬戶內並沒有該等權益，則有關選擇將不會獲處理。)

(a) Transferred together with the benefits derived from the mandatory contributions as in section III(8). 與在第III部第(8)項所述由強制性供款所產生的權益一併轉移。

(b) Withdrawn in accordance with the governing rules of the original scheme. 按照原計劃的管限規則提取權益。

Method of payment (please ✓ as appropriate) 付款方式(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人員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。)

(i) By depositing directly into a bank account under the sole name of scheme member only (a bank account under the name of a third party is not applicable). (This option is applicable only to trustees who provide such services and there may be bank charges involved. Please check with the original trustee for details.) 直接存入只以計劃成員名義開立的銀行賬戶(不適用於以第三者名義開立的銀行賬戶)。(這項選擇只適用於有提供此項服務的受託人，而銀行可能會因此而收取費用。詳情請向原受託人查詢。)

Name of bank account holder 銀行賬戶持有人姓名：CHAN CHI KEUNG
Name of bank 銀行名稱：ABC BANK
Bank account number 銀行賬戶號碼：111-1-111111

(ii) By cheque 支票付款

Please select the type of account and provide the account information of the new account for the MPF accrued benefits derived from the mandatory contribution to be transferred to the new account, please select one from either (a), (b) or (c). 請選擇將強制性供款所產生的強積金累算權益轉移至新賬戶的賬戶類別及提供賬戶資料，請選擇(a)、(b)或(c)其中一項。

Please fill in part (a) or (b) in order to arrange for transfer or withdrawal of your voluntary contribution in your original scheme. 請填寫(a)或(b)部分以安排你於原計劃內的自願性供款轉移或提取。

(a) Transfer to the HSBC/ Other MPF contribution account that the new employer opened in regard to the member. 轉移至新僱主就成員開立的滙豐/其他強積金供款賬戶。

Please fill in the 8-digit Employer ID/Scheme ID. 請填寫8位數字的僱主編號/計劃編號。

(b) Transfer to the member's own HSBC/Other MPF account, HSBC MPF account such as:
- Self-employed person account, or
- Newly applied/existing HSBC MPF personal account (Forms IN81 must be submitted at the same time if applicable). 轉移至成員本人的滙豐/其他強積金賬戶，滙豐強積金賬戶例如：
- 自僱人士賬戶，或
- 新申請/現有之滙豐強積金個人賬戶(須同時遞交IN81表格，如適用)。

(c) Retain in the personal account in the original scheme (retain the existing HSBC MPF account in the personal account of the original scheme), this item is not applicable for the self-employed person. Please peruse Note 7. 保留於原計劃內的個人賬戶(把現有的滙豐強積金賬戶保留在原計劃內的個人賬戶)，自僱人士不適用此項，請參閱註7。

SECTION III – TRANSFER OPTIONS ^{Note 8, 9} (CONT'D) **第III部 – 轉移選擇** ^{註8, 9} (續)

(10) Flexi-Contributions 靈活供款

Flexi-Contributions will be retained at HSBC Master Trust until a closure of the Flexi-Contribution account request is received by The Hongkong and Shanghai Banking Corporation Limited. 靈活供款將保留在滙豐集成信託計劃內直至香港上海滙豐銀行有限公司收到要求終止靈活供款賬戶的通知。

SECTION IV – TERMINATION OF MPF ACCOUNT WITH NO RESIDUAL BALANCE (IF APPLICABLE)

第IV部 – 終止沒有剩餘款項的強積金賬戶(如適用)

(11) I hereby give the original trustee an instruction to terminate my relevant MPF member account as referred to in section II(5) upon transfer of the full benefits to the new trustee and there is no residual balance in the said account. 本人謹此指示原受託人，在把本人於第II部第(5)項所述的強積金成員賬戶內的所有權益轉移至新受託人後，以及在該賬戶內並無剩餘款項的情況下，終止該強積金成員賬戶。

SECTION V – DECLARATION AND AUTHORISATION **第V部 – 聲明及授權書**

(12) I hereby give consent to the MPFA, HSBC Provident Fund Trustee (Hong Kong) Limited and The Hongkong and Shanghai Banking Corporation Limited and the new trustee to disclose information supplied by me in support of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer. 本人同意積金局、HSBC Provident Fund Trustee (Hong Kong) Limited及香港上海滙豐銀行有限公司及新受託人可為處理本人的轉移申請，向相關受託人及相關服務提供者披露本人就此項轉移申請提供的資料，或使該等機構／人士能夠取覽或披露該等資料。

(13) I understand and agree that the Flexi-Contributions (if any) in the Existing Employer's MPF scheme will continue in an independent Flexi-Contribution account under the current scheme, and the investment mandate of future contributions and benefits transferred from another scheme of this independent Flexi-Contribution account will be the same as the investment mandate of the Flexi-Contribution account under the Existing Employer's MPF scheme, which can be DIS or own investment option, unless an independent Flexi-Contribution account exists at the time of transfer. 成員明白和同意於現僱主強積金計劃內的靈活供款(如有)將自動轉延至現有計劃內另一個獨立靈活供款賬戶，而該獨立靈活供款賬戶之未來供款及轉移自另一計劃的權益的投資選擇將與現僱主的強積金計劃內的靈活供款賬戶之未來供款及轉移自另一註冊計劃的權益的投資選擇相同，而投資選擇可以是「預設投資策略」或自選投資組合，除非於權益轉移時，已有此獨立靈活供款賬戶。

(14) (Only applicable to fund transfer to HSBC MPF – SuperTrust Plus 只適用於資金轉移至滙豐強積金智選計劃)

I authorise HSBC Provident Fund Trustee (Hong Kong) Limited and The Hongkong and Shanghai Banking Corporation Limited to obtain the necessary information in respect of my MPF account(s) from the original trustee, to make any necessary amendment(s) to this form and to pass the copy of my identification document to the original trustee if it is so required, solely for the purpose of processing this transfer. 本人授權HSBC Provident Fund Trustee (Hong Kong) Limited及香港上海滙豐銀行有限公司向原受託人索取有關本人之強積金賬戶的所需資料並就本表格作出任何必須的修正，以及於有需要的情況下將本人的身分證明文件副本轉交予原受託人，以達至處理是次轉移的目的。

(15) I declare that 本人聲明：

- (a) I have read and understood the Notes to Transfer of MPF Accrued Benefits (Benefits) by Scheme Member and the Explanatory Notes; and 本人已閱讀及明白《計劃成員轉移強積金累計權益(權益)須知》及註釋的內容；及
- (b) to the best of my knowledge and belief, the information given in this Form is correct and complete; and 盡本人所知所信，本表格所提供的資料均屬正確無訛且無缺漏；及
- (c) I 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)，並同意遵守此處的規則。

X

Chan

Signature of the scheme member ^{Note 6} 計劃成員簽署^{註6}

2022/06/30

Date 日期

Please state the date.
請註明日期。

Please provide the signature of the Scheme Member. This signature must be the same as that you given to the original trustee. It is recommended that you refer to the duplicate copy of your employee application form before signing. If you have forgotten your signature, you can enquire with your original trustee.
請提供計劃成員簽署，此簽署須與你之前給予原受託人的簽署式樣相同，建議你於簽署前先參考你的僱員申請表副本。如你忘記簽署式樣，可向原受託人查詢。

If any deletion/alteration has been made, please sign next to the deleted/alterted portion as confirmation.
如曾作出任何刪改，請在所有刪改部分旁簽署作實。

Before completing the INPM form, please read carefully the Notes to Transfer of MPF Accrued Benefits (Benefits) by Scheme Member (including the notes of the default investment strategy "DIS") and Explanatory Notes.

填寫INPM表格前，請先小心閱讀計劃成員轉移強積金累算權益(權益)須知(包括有關「預設投資策略」的事項)及註釋。

NOTES TO TRANSFER OF MPF ACCRUED BENEFITS (BENEFITS) BY SCHEME MEMBER

(for self-employed person, personal account holder or employee ceasing employment)
Sections 145, 146, 147, 148 and 149 of
the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)

計劃成員轉移強積金累算權益(權益)須知 (適用於自僱人士、個人賬戶持有人或終止受僱的僱員)

《強制性公積金計劃(一般)規例》(《第485A章》)第145、146、147、148及149條

Please read the following **important notes** before completing INPM Form. 填寫INPM表格前，請先閱讀下列**重要資料**：

(1) **Definition of terms 用詞定義：**

- (a) "Contribution account"
「供款賬戶」 - an account in an MPF registered scheme (scheme) which is mainly used to receive MPF contributions (both employer and employee portions) made by an employer for an employee and on behalf of the employee or by a self-employed person. 指強積金註冊計劃(計劃)下主要用以接收僱主為僱員所作出以及代表僱員所作出的強積金供款(包括僱主及僱員部分)或自僱人士所作出的強積金供款的賬戶。
- (b) "Personal account"
「個人賬戶」 - an account in a scheme which is mainly used to receive the benefits transferred from another contribution or personal account. 指計劃下主要用以接收由另一供款或個人賬戶轉入的權益的賬戶。
- (c) "Original trustee" (also known as "transferor trustee" in the Mandatory Provident Fund Schemes (General) Regulation (the Regulation))
「原受託人」(在《強制性公積金計劃(一般)規例》(《規例》)中亦稱「轉移受託人」) - the trustee of a scheme from which your benefits are to be transferred. 指轉出你的權益的計劃的受託人。
- (d) "New trustee" (also known as "transferee trustee" in the Regulation)
「新受託人」(在《規例》中亦稱「承接受託人」) - the trustee of a scheme to which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same scheme or to another scheme under the same trustee, the new trustee on INPM Form will be the same as the original trustee. 指轉入你的權益的計劃的受託人。如果你選擇把權益轉移至同一計劃的另一個賬戶或轉移至同一受託人的另一個計劃，INPM表格所指的新受託人將與原受託人相同。
- (e) "Original scheme"
「原計劃」 - the scheme from which your benefits are to be transferred. 指轉出你的權益的計劃。
- (f) "New scheme"
「新計劃」 - the scheme to which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same scheme, the new scheme on INPM Form will be the same as the original scheme. 指轉入你的權益的計劃。如果你選擇把權益轉移至同一計劃的另一個賬戶，INPM表格所指的新計劃將與原計劃相同。

(2) If you are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that 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 original scheme or consult your original trustee for details. 如果你現時投資於強積金保證基金，從該保證基金轉出權益，可能會導致你不符合部分或所有保證條件，以致影響你享有保證的資格。詳情請查閱原計劃的要約文件，或向原受託人查詢。

(3) If you wish to transfer your benefits from one scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy (DIS) if you either (a) do not give or have not given any investment instructions for the account to invest benefits according to your new trustee or (b) have given investment instructions for the account to invest benefits according to the DIS. Please approach your new trustee to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in the new scheme, please also approach the new trustee. 如欲把權益從一個計劃轉移至另一個計劃，請留意轉入賬戶的權益將會如何投資。一般而言，如果你(a)沒有或尚未就有關賬戶向你的新受託人給予任何投資指示；或(b)已就有關賬戶給予投資指示，要求把權益按照預設投資策略投資，則轉入該賬戶的權益將按照預設投資策略投資。如有需要，請向新受託人查詢詳情。如欲就新計劃的賬戶更改或給予投資指示，亦請聯絡新受託人。

Note of the DIS.
「預設投資策略」的事項。

(Please tear off 請撕下)

Note of the DIS.
「預設投資策略」的事項。

- (4) If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the 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 investment in the DIS and your transfer request take place at around the same time, the trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant trustee(s) if you wish to know the details of how the trustee(s) will handle these transactions. 如果你已年滿或快將年滿 50 歲，而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，與接獲你的轉移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《強制性公積金計劃條例》規定的情況下，訂定處理降低風險及轉移權益的次序。如欲瞭解受託人如何處理該等交易，請向相關受託人查詢詳情。
- (5) Please ensure that you have a personal account or a contribution account in the new scheme. Otherwise, you have to enrol in that scheme before you submit INPM Form to the new trustee. 請確保你在新計劃已開立個人賬戶或供款賬戶。否則，你須先行登記參加該計劃，然後才向新受託人提交 INPM 表格。
- (6) If you wish to transfer-out the benefits from more than one accounts, you should submit a separate INPM Form for each of those accounts. 如欲從多於一個賬戶轉出權益，請就每個賬戶分別提交一份 INPM 表格。
- (7) If you wish to transfer-out the benefits from your contribution account during employment, you should complete Form MPF(S)-P(P)[INEC]. 如欲在現職期間從你的供款賬戶轉出權益，請填寫第 MPF(S)-P(P) 號表格 [INEC]。
- (8) For each account, a scheme member should transfer the entirety of his benefits therein in a lump sum except the part of the benefits derived from voluntary contributions which the scheme member may elect to withdraw in accordance with the governing rules of the original scheme. 就每一個賬戶，除了由自願性供款所產生的權益或可根據原計劃管規規則選擇提取外，計劃成員應把賬戶內的所有權益整筆轉移。
- (9) In order to prevent a third party from filling in incorrect information, please **DO NOT sign on a blank form**. After the completed INPM Form has been received by the new trustee, the administration procedures taken by the trustees may not be reversible. 為免被第三者填上不正確的資料，**請勿在空白的表格上簽署**。在新受託人收到已填妥的 INPM 表格後，之前由受託人採取的行政步驟未必能夠撤銷。
- (10) If any information provided on INPM Form (including the signature) is incorrect or incomplete, the trustees may not be able to process your benefit transfer request. 若你在 INPM 表格上所提供的任何資料(包括簽署)不正確或不完整，受託人可能無法處理你的權益轉移要求。
- (11) Please refer to the publication of the MPFA available from the MPFA website (www.mpfa.org.hk) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment. 有關選擇計劃時各項考慮因素及強積金投資的潛在風險，請參閱積金局網站 (www.mpfa.org.hk) 的相關宣傳刊物。
- (12) Information about the new scheme is set out in the offering document of that scheme. This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the relevant trustee for enquiries about account details and information on specific schemes or funds. 新計劃的要約文件載有該計劃的資料，這些資料將有助你決定是否把權益轉移至該計劃。如欲查詢賬戶詳情及個別計劃或基金的資料，請聯絡相關受託人。
- (13) If you wish to make enquiries or seek assistance in relation to your election to transfer benefit, please contact your original trustee or new trustee. For general enquiries regarding benefit transfer, you may contact the MPFA via e-mail: mpfa@mpfa.org.hk or hotline: 2918 0102. 如欲就你的權益轉移申請作出查詢或尋求協助，請聯絡你的原受託人或新受託人。有關權益轉移的一般查詢，可聯絡積金局(電郵地址：mpfa@mpfa.org.hk 或熱線電話：2918 0102)。

Please complete INPM Form at page 1 to page 4 and submit it to the new trustee after completion. Please detach this note and keep it for reference.

**請填妥載於第 1 頁至第 4 頁的 INPM 表格，並提交該表格予新受託人。
請撕下此須知並保留以作參考。**

Explanatory Notes 註釋

- (1) If you do NOT possess a HKID Card, please fill in your name as shown on your passport. 如你沒有香港身分證，請填上你在護照上的姓名。
- (2) The transfer request may not be processed if the name of the original trustee, the name of the original scheme, your scheme member's account number in the original scheme, type of MPF account, the name of your former employer or the employer's identification number is not provided or is incorrect. This information can be found 如你沒有提供原受託人名稱、原計劃名稱、原計劃成員賬戶號碼、強積金賬戶類別、前任僱主名稱或僱主識別號碼，或所提供的資料有誤，則此項轉移要求或不獲處理。你可透過以下途徑獲取有關資料：
- (a) in your 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
 - (b) in your annual benefit statement, or other statements provided by the trustee; or 查閱周年權益報表或受託人提供的其他報表；或
 - (c) through the member enquiry facilities available from the trustee. 受託人提供的成員查詢服務。

If you are in doubt, please contact your original trustee or your employer. 如有疑問，請聯絡你的原受託人或僱主。

- (3) The employer's identification number is the number assigned by the trustee to the employer concerned. Trustees may use different names for this number (e.g. account number, company code, contract number, employer account number, employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). The number can be found in the statements issued by the trustees or through the member enquiry facilities available from the trustee. If you are in doubt, please contact your trustee or your employer. 僱主識別號碼即受託人為有關僱主編配的號碼。受託人或會使用不同名稱來設定此號碼(例如賬戶編號、僱主編號、合約編號、強積金客戶編號、參與計劃編號、計劃編號、附屬計劃編號)。你可查閱受託人發出的報表或透過受託人提供的成員查詢服務獲取該號碼。如有疑問，請聯絡你的受託人或僱主。
- (4) The transfer request may not be processed if the name of the new trustee, the name of the new scheme or your scheme member's account number in the new scheme is not provided or is incorrect. The information can be found 如你沒有提供新受託人名稱、新計劃名稱或新計劃成員賬戶號碼，或所提供資料有誤，則此項轉移申請或不獲處理。你可透過以下途徑獲取有關資料：
- (a) in your 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
 - (b) in your annual benefit statement, or other statements provided by the trustee; or 查閱周年權益報表或受託人提供的其他報表；或
 - (c) through the member enquiry facilities available from the trustee. 受託人提供的成員查詢服務。

You may, however, leave the scheme member's account number blank if you have recently enrolled in the scheme and have not been notified of the new account number. If you are in doubt, please contact your new trustee. 不過，如你最近才參加計劃，並未獲悉新的成員賬戶號碼，則可留空此項。如有疑問，請聯絡你的新受託人。

- (5) A scheme member can check whether his existing MPF account contains any benefits derived from voluntary contributions from his annual benefit statement issued by the original trustee to the scheme member. The scheme member can also check this information through the member enquiry facilities available from the trustee. If you are in doubt, please contact your original trustee. 計劃成員可在原受託人向計劃成員發出的周年權益報表上，獲知其現有強積金賬戶內是否有由自願性供款所產生的權益。計劃成員亦可透過受託人提供的成員查詢服務查核這項資料。如有疑問，請聯絡你的原受託人。
- (6) The signature must be the same as your specimen signature previously given to your original trustee. Please note that the transfer may not be processed if the signature provided in this Form does not match your specimen signature previously given to your original trustee. If you are in doubt, please contact your original trustee. 你的簽署必須與你之前給予原受託人的簽署式樣相同。請注意，若本表格上的簽署與你之前給予原受託人的簽署式樣不符，有關轉移或不獲處理。如有疑問，請聯絡你的原受託人。

- (7) A self-employed person elected to transfer the benefits to a personal account should complete option (b) under section III(8). 如自僱人士選擇將權益轉移至個人賬戶，須填寫第 III 部第 (8)(b) 項。
- (8) If you are electing a transfer of your benefits, from one account to another account or a personal account within the same HSBC MPF scheme, the transfer of benefits is effected by way of unit transfer without any redemption, regardless the investment allocation in new account. If you wish to change the investment allocation, please complete and submit to us the change of investment instruction form according to your investment objectives. Please refer to the Member Service Guide for the detailed information of investment allocation. You may download the relevant form from HSBC website www.hsbc.com.hk/mpf or contact our HSBC MPF Member Hotline 3128 0128 for assistance. For all other types of transfer, transfers will be effected by way of redemption of units, and the redemption proceeds will be reinvested according to the new investment allocation instruction. In such case, the transfer will be subject to 'out-of-market risk' as a result of the time gap between the redemption from the existing MPF account and investment in your designated account. 如你選擇將權益，於同一個滙豐強積金計劃之內由一個賬戶轉移至另一個賬戶或個人賬戶，不論新賬戶所選擇的投資分布如何，權益的轉移是把基金單位轉移而毋須贖回。如你欲更改投資分配，請根據你的投資目標，填妥及遞交更改投資指示表格予我們。有關更改投資分配之詳情請參閱成員服務指南。你可於滙豐的網址 www.hsbc.com.hk/mpf 下載或致電我們的滙豐強積金成員熱線 3128 0128 索取有關表格。任何其他情況的轉移，基金單位將會被贖回及被贖回之款項將按照新的投資分布指示再作投資。在這種情況下，由現有強積金賬戶被贖回之款項再投資於你指定賬戶的期間將可能出現「投資真空期風險」。
- (9) Please note that all or part of your benefits in excess of any offsetting amount of severance payment or long service payment by your former employer upon your cessation of employment will be transferred in the manner prescribed in (8) above. 請注意，在你終止受僱時於你的前僱主抵銷任何遣散費或長期服務金後多出的全部或部分權益將根據上述第 8 項的規定方式轉移。

~ END 完 ~