

To 致: The Hongkong and Shanghai Banking Corporation Limited

香港上海滙豐銀行有限公司

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

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



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INCDEE01

Occupational Retirement Schemes

職業退休計劃

HSBC ORSO Defined Contribution Scheme – Personal Details Change Form  
滙豐職業退休界定供款計劃 – 更改個人資料表格

- Note 注意: 1. Please read personal information collection statement in Section D before completing this form. 填寫本表格前, 請先細閱D部的收集個人資料聲明。  
2. Please complete in BLOCK LETTERS and tick ✓ the appropriate box. 請用正楷填寫, 並於適當的方格內加上「✓」號。  
3. Please return the completed form to your employer. 請把填妥的表格交回你的僱主。

A. Personal Information 個人資料

1. Full name (In English) 全名(英文)	2. HKID/Passport no. <sup>1</sup> 香港身分證/護照號碼 <sup>1</sup>
3. Scheme ID 計劃編號	4. Pay Centre ID 付款中心編號
5. Employer Name (In English) 僱主名稱(英文)	

B. Details of Changes Required 所需更改資料

1. Residential address (in English)<sup>2</sup> 住宅地址(英文)<sup>2</sup>

Flat/Room 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

2. Postal address (in English)<sup>2</sup> 郵寄地址(英文)<sup>2</sup>

Same as above residential address 與上述住宅地址相同

Flat/Room 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

## B. Details of Changes Required (Cont'd) 所需更改資料(續)

3. Contact no. 聯絡號碼	Country/Region code 國家／區域編號	Area code 地區號碼	Phone no. 電話號碼
Mobile phone no. <sup>2</sup> 流動電話號碼 <sup>2</sup>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home phone no. 住宅電話號碼	<input type="text"/>	<input type="text"/>	<input type="text"/>
Office phone no. 公司電話號碼	<input type="text"/>	<input type="text"/>	<input type="text"/>
Facsimile no. 傳真號碼	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Email address<sup>2</sup> 電郵地址<sup>2</sup>

### Explanatory notes 填報須知

<sup>1</sup> Passport number should be given only if you do not possess a HKID card. 只在沒有香港身分證的情況下才填寫護照號碼。

<sup>2</sup> Please note that if you wish to register for HSBC Online Banking and Mobile Banking (these services are only available for eligible schemes and not available for passport holders with passport numbers containing more than 12 characters (including English letters and/or digits)), you should provide your postal address in English, mobile phone number, and email address. 請注意：如你欲登記使用滙豐網上理財及流動理財(這些服務只適用於合資格的計劃，同時，不適用於護照號碼超過12位字元(包括英文字母及/或數字)的護照持有人)，你必須提供英文郵寄地址、流動電話號碼及電郵地址。

## C. Others 其他 (Please specify any other changes and provide supporting documents. 請註明其他更改事項，並提供有關的證明文件。)

(Example: Nationality (Country/Region) 例如：國籍(國家／地區))

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

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

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

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

5. To the extent not prohibited by applicable law, we, entities of the HSBC Group, intend to use your personal data in direct marketing of occupational retirement scheme products and/or occupational retirement scheme services, and we require your consent (which includes an indication of no objection) for that purpose. In this connection, please note that: 限於不在適用法律禁止之列，我們，滙豐集團成員，擬把你的個人資料用於職業退休計劃產品及／或職業退休計劃服務的直接促銷，而我們為該用途須獲得你的同意(包括表示不反對)。就此，請注意：

- (i) your name, contact details, other products and services portfolio information, transaction pattern and behaviour, financial background and demographic data held by us from time to time may be used in direct marketing; and 我們可能把我們不時持有你的姓名、聯絡資料、其他產品及服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷；及
- (ii) the occupational retirement scheme products and/or occupational retirement scheme services offered by entities of the HSBC Group may be marketed. 可用作促銷由滙豐集團成員所提供的職業退休計劃產品及／或職業退休計劃服務。

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

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, by calling us on (852) 2288 6655, 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，致電我們(852) 2288 6655，從而接收我們的精彩優惠及推廣資訊。

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

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

2. Failure to provide your information may result in us being unable to process your application or perform the services you request. 如你未能提供資料將可能導致我們未能處理你的申請或提供你所要求的服務。

3. Personal data held by us relating to a Participating Employer (if applicable) and/or Member will be kept confidential but, to the extent not prohibited by applicable law, such information may be provided by us or any of our service providers to the following parties for the purposes set out in paragraph 1:-(i) any regulators or government authorities; (ii) any service provider, agent or contractor who provides administrative, telecommunications, computer, payment, data processing, matching, storage, customer research or survey or other services in connection with the operation of our occupational retirement scheme business; (iii) relevant Participating Employers (if applicable); (iv) entities of the HSBC Group. Such information may be transferred to a place outside Hong Kong Special Administrative Region. 由我們持有參與僱主(如適用)及／或成員的個人資料將予保密，但限於不在適用法律禁止之列，我們或任何我們的服務供應商可能會將該等資料提供給以下各方作第1段所述的用途：(i)任何監管機構或政府機關；(ii)任何提供與營運我們的職業退休計劃業務有關的行政、電訊、電腦、付賬、數據處理、核對、儲存、客戶研究或調查或其他服務的任何服務供應商、代理人或承包商；(iii)相關的參與僱主(如適用)；(iv)滙豐集團成員。該等資料可能轉移至香港特別行政區以外的地方。

4. You have the right to request access to and correction of your personal data held by us. Request should be addressed to: The Data Protection Officer, HSBC Institutional Trust Services (Asia) Limited, c/o The Hongkong and Shanghai Banking Corporation Limited, PO Box 74203, Kowloon Central Post Office. For enquiries, please contact our Hotline at (852) 2288 6655. 你有權要求查閱及更改由我們持有你的個人資料。如有需要，可致函九龍中央郵政信箱74203號(c/o The Hongkong and Shanghai Banking Corporation Limited香港上海滙豐銀行有限公司)，向滙豐機構信託服務(亞洲)有限公司資料保障主任提出要求。如有查詢，可致電(852) 2288 6655。

5. To the extent not prohibited by applicable law, we, entities of the HSBC Group, intend to use your personal data in direct marketing of occupational retirement scheme products and/or occupational retirement scheme services, and we require your consent (which includes an indication of no objection) for that purpose. In this connection, please note that: 限於不在適用法律禁止之列，我們，滙豐集團成員，擬把你的個人資料用於職業退休計劃產品及／或職業退休計劃服務的直接促銷，而我們為該用途須獲得你的同意(包括表示不反對)。就此，請注意：

- (i) your name, contact details, other products and services portfolio information, transaction pattern and behaviour, financial background and demographic data held by us from time to time may be used in direct marketing; and 我們可能把我們不時持有你的姓名、聯絡資料、其他產品及服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷；及
- (ii) the occupational retirement scheme products and/or occupational retirement scheme services offered by entities of the HSBC Group may be marketed. 可用作促銷由滙豐集團成員所提供的職業退休計劃產品及／或職業退休計劃服務。

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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。

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**E. Declaration and authorisation 聲明及授權書**

I declare that the above information is true and correct. 茲證明上述所填報資料均屬正確無誤。

**X**

Signature of the member 成員簽署

Full name 全名

Date 日期

**Employer's authorisation 僱主授權書**

I/We confirm that the information given in the form is correct and complete. 本人／吾等確認本表格所提供的資料為正確及完整。

Authorised signature(s) of employer 僱主授權簽署

Authorised signature(s) of employer 僱主授權簽署

**X****X**

Full name 全名

Full name 全名

Job position 職銜

Job position 職銜

Date 日期

Date 日期

<b>For Office Use Only</b> 公司專用	Signature verified by	Entered by	Checked by
	Date	Date	Date