

**注意 Note:**

1. 請在適當的方格內加上「✓」號。Please tick "✓" in appropriate box.
2. 請於遞交申請時連同商業登記證及公司註冊證書(如有)核證副本。Please submit this application form together with a certified true copy of BR and CI (if any).
3. 核證身份證明文件副本須經由合適之證明人認證為真確的副本，合適之證明人包括認可的執業律師/執業會計師/公證人/專業公司秘書或強積金中介人。中銀國際英國保誠信託有限公司「受託人」保留權利拒絕接受核證文件。The certified copy of identification document must be certified as a true copy by a professional person such as a recognized lawyer/certified public accountant/notary public/professional company secretary or MPF Intermediary. BOCI-Prudential Trustee Limited (the "Trustee") reserves the right to refuse to accept the certified documentation.
4. 受託人保留索取更多資料及文件的權利，以作遵守監管規定之目的。The Trustee reserves the right to request additional information and documents for the purpose of complying with regulatory requirements.

計劃編號 (公司專用)  
Scheme No. (Official use only)

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**(I) 僱主資料 EMPLOYER DETAILS**

1. 僱主名稱  
Employer Name  
英文 English \_\_\_\_\_  
中文 Chinese \_\_\_\_\_
2. 登記號碼及註冊地點  
Registration No. and Place of Incorporation  
(請附上核證副本 Please provide a certified true copy)  
登記類別 Registration Types  
☐ 商業登記 Business Registration (BR)      ☐ 稅務局(慈善機構) Inland Revenue Department (Charitable Organizations) (IR)  
☐ 教育局 Education Bureau (ED)      ☐ 香港警務處社團事務處(社團) Societies Office of HK Police (Societies) (SO)  
☐ 職工會登記局 Registry of Trade Unions (TU)      ☐ 其他, 請註明 Others, please specify (OT) : \_\_\_\_\_  
 登記號碼 Registration No. \_\_\_\_\_  
 註冊地點 Place of Incorporation \_\_\_\_\_
3. 發行不記名股份  
Issuance of bearer shares  
(此欄僅適用於有限公司及其公司的所有中介層 This field is only applicable for Limited Company and all of its intermediate layers)  
 貴公司或任何股東有否發行任何不記名股份? Have your company or any of your shareholders issued any bearer shares?  
☐ 有 Yes  
☐ 否。我們特此聲明我們或我們的任何股東均未有發行任何不記名股份。如我們或我們任何的股東發行不記名股份或將任何股份轉換成不記名股份，我們將立即通知貴公司。No. We hereby declare that neither we nor any of our shareholders has issued any bearer shares. If we or any of our shareholders issue any bearer shares or convert any shares into bearer shares, we will inform your company.
4. 註冊地址  
Registered Address  
 室 Flat/Room \_\_\_\_\_ 樓 Floor \_\_\_\_\_ 座 Block \_\_\_\_\_ 大廈/屋邨名稱 Name of Building/Estate \_\_\_\_\_  
 街道號碼 Street No \_\_\_\_\_ 街道名稱 Name of Street \_\_\_\_\_  
☐ 香港 HK    ☐ 九龍 KLN    ☐ 新界 NT  
 地區 District \_\_\_\_\_  
 只適用於香港以外地址 Applicable to address outside HK only    城市 City \_\_\_\_\_    國家/地區 Country/Region \_\_\_\_\_
5. 現時營業地址  
Current Business Address  
☐ 與上述註冊地址相同 Same as above Registered Address  
 室 Flat/Room \_\_\_\_\_ 樓 Floor \_\_\_\_\_ 座 Block \_\_\_\_\_ 大廈/屋邨名稱 Name of Building/Estate \_\_\_\_\_  
 街道號碼 Street No \_\_\_\_\_ 街道名稱 Name of Street \_\_\_\_\_  
☐ 香港 HK    ☐ 九龍 KLN    ☐ 新界 NT  
 地區 District \_\_\_\_\_  
 只適用於香港以外地址 Applicable to address outside HK only    城市 City \_\_\_\_\_    國家/地區 Country/Region \_\_\_\_\_

**(I) 僱主資料(續) EMPLOYER DETAILS (CONT'D)**

6. 通訊地址 Correspondence Address ☐ 與上述註冊地址相同 Same as above Registered Address ☐ 與上述營業地址相同 Same as above Business Address

室 Flat/Room	樓 Floor	座 Block	大廈/屋邨名稱 Name of Building/Estate
街道號碼 Street No	街道名稱 Name of Street		
<input type="checkbox"/> 香港 HK <input type="checkbox"/> 九龍 KLN <input type="checkbox"/> 新界 NT			
地區 District			
只適用於香港以外地址 Applicable to address outside HK only		城市 City	國家/地區 Country/Region

7. 業務性質\* Nature of Business\*  
\*請參照(XI)部附錄 \*Please refer to Part (XI) Appendix

8. 經營地/主要業務所在地 Place of operation/ main business  
☐ 中國香港 Hong Kong, China ☐ 中國內地 Mainland China  
☐ 其他 Others (請註明 please specify): \_\_\_\_\_

9. 公司業務所涉及之國家/地區# Countries / Regions# involved in business  
☐ 中國香港 Hong Kong, China ☐ 中國內地 Mainland China  
☐ 其他 Others (請註明 please specify): \_\_\_\_\_  
#包括客戶/代理人/供應商/商業夥伴的所在地、貨物/產品的來源地及跟國家/地區擁有或控制的公司有關連/業務覆蓋  
# includes clients / agents / suppliers / business partners, origin of goods / products and connection with / exposure to state owned or controlled entities.

10. 貴公司或任何股東是否在受制裁國家/地區(包括北韓、伊朗、敘利亞、古巴、克里米亞地區、頓涅茨克地區或盧甘斯克地區)經營業務? Do your company or any of your shareholders carry out any business in any sanctioned country/region (including North Korea, Iran, Syria, Cuba, Crimea Region, Donetsk Region or Luhansk Region)?  
☐ 是 Yes (請註明受制裁國家/地區名稱 Please specify the name of sanctioned country/region): \_\_\_\_\_  
☐ 否 No  
註：經營業務的地點是指營運/客戶/代理人/供應商/商業夥伴的所在地、貨物/產品的來源地及跟國家/地區擁有或控制的公司有關連/業務覆蓋。  
Remarks: Location to carry out business includes place of operations / clients / agents / suppliers / business partners, origin of goods / products and connection with / exposure to state owned or controlled entities.

11. 披露資料予強積金中介人同意書 Consent of Disclosure of Particulars to MPF Intermediary  
☐ 如閣下同意披露及轉移下列指定之個人資料及戶口資訊予(I) 部 11a 提及之強積金中介人並即時生效，以協助管理閣下之強積金戶口(強積金中介人授權書)，請在方格內填上剔號。Please tick the box if you give authorization to the Trustee, to disclose and transfer your personal information and account information as specified below ("Information") to your MPF intermediary (including Principal Intermediary and Subsidiary Intermediary) mentioned in Part (I) 11a in order to assist you to manage your MPF Accounts with immediate effect ("MPF Intermediary Authorization").  
閣下理解及同意受託人會不時獲授權通知、指定其他強積金中介人為閣下提供強積金相關協助。You understand and agree that, from time to time, the Trustee is authorized to notify you with the assignment of another MPF intermediary to provide MPF related assistance to you.  
閣下聲明此授權將與本表格同時生效，並保持其效力除非及直至閣下遞交「撤銷同意披露資料予強積金中介人資料通知書 - 僱主/個人(除僱員成員)」以撤銷其效力；及受託人獲悉及收到其「撤銷同意披露資料予強積金中介人資料通知書 - 僱主/個人(除僱員成員)」。You declare that the authorization shall take effect on the date of this form and remain in force unless and until it is revoked by you by submitting the "Revocation Notice for Consent of Disclosure of Particulars to MPF Intermediary - Employer/Individual (Other than Employee Member)"; and the Trustee has been notified of and has received the "Revocation Notice for Consent of Disclosure of Particulars to MPF Intermediary - Employer/Individual (Other than Employee Member)".  
閣下授意披露及轉移的資訊將包括但不限於 Information that you wish to be disclosed and transferred shall include but not limited to:  
個人資料 Personal Information 電話號碼、電郵地址及傳真號碼 Telephone number, email address and fax number  
戶口資訊 Account Information 計劃生效日期、合約狀況、合約編號、累算權益、總戶口結餘、基金戶口結餘、基金交易詳情、計劃轉移詳情及金額、投資分佈、投資回報、供款紀錄及任何關於帳戶的操作和未解決的帳戶問題 Scheme effective date, contract status, contract number, accrued benefits, total account balance, account balance by fund, details of fund transaction, transfer-in details and amount, investment allocation, investment return, contribution history and any operations and outstanding issues of the accounts

11a 強積金中介人資料 MPF Intermediary Particulars  
強積金中介人名稱 Name of MPF Intermediary  
強積金註冊編號 MPF Registration No.  
主事中介人名稱 Name of Principal Intermediary

### (III) 稅務居民身份自我證明(必須填寫) SELF-CERTIFICATION OF TAX RESIDENCY (MUST FILL)

- ☐ 實體屬於獨資經營者或個人，請填寫一份「自我證明表格 - 個人」及前往(III)部  
Entity is a sole proprietor or an individual, please complete a "Self-Certification Form - Individual" and go to Part (III)
- ☐ 實體並非獨資經營者或個人，請繼續填寫下列部分  
Entity is NOT a sole proprietor or an individual, please continue to complete this section

以下部分由非獨資經營者或個人的帳戶持有人填寫。此部分所指之「實體」為法團或合夥(獨資經營者除外)。  
Following section should be completed by an account holder who is NOT a sole proprietor or an individual. The Entity mentioned in this section refers corporations and partnerships (excluding sole proprietors).

#### 注意 Note:

- 這是您向中銀國際英國保誠信託有限公司(「受託人」)提供的自我證明，以作自動交換財務帳戶資料用途以遵守稅務法律及規例(包括但不限於《稅務條例》(第 112 章)和根據自動交換資料有關的經濟合作與發展組織(OECD)《通用報告準則》(CRS)的規則)。受託人可把收集所得的資料交給稅務局，稅務局會將資料交到另一申報稅務司法管轄區的主管部門。This is a Self-Certification provided by you to BOCI-Prudential Trustee Limited (the "Trustee") for the purpose of Automatic Exchange of Financial Account Information ("AEOI") in compliance with tax law and regulations (including but not limited to the Inland Revenue Ordinance (Cap.112) and regulations based on the Organisation for Economic Co-operation and Development (OECD) Common Reporting Standard (CRS) for automatic exchange of information). The data collected may be transmitted by the Trustee to the Inland Revenue Department for which may further exchange such information to the competent authority of another reportable jurisdiction.
- 除非實體的稅務居民身份有任何改變，否則此自我證明將被視為仍然有效。如情況有所改變，以致影響本聲明所述的實體的稅務居民身份，或引致本表格任何部份所載的資料不正確，您必須在情況有所改變後的 30 天內通知受託人有關的改變並提供最新的自我證明。This Self-Certification will remain valid unless there is any change in circumstances relating to the status of tax residency(ies) of the Entity. You must notify the Trustee within 30 days if there is any change in circumstances that makes any of the information provided in any parts of this self-certification form incorrect or incomplete and provide an updated self-certification form.
- 作為財務機構，受託人不獲允許提供稅務或法律意見。若您對您的稅務居民身份存有任何疑問，請詢問專業稅務顧問或瀏覽 OECD (<https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/>) 及稅務局 ([https://www.ird.gov.hk/eng/tax/dta\\_aeoi.htm](https://www.ird.gov.hk/eng/tax/dta_aeoi.htm)) 有關自動交換財務帳戶資料的網頁，或掃描此二維碼，以獲取更多 CRS 及相關資料。As a financial institution, the Trustee is not allowed to give tax or legal advice. If you have any questions regarding your tax residency, please consult your tax adviser or visit the OECD and Inland Revenue Department's AEOI website at <https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/> and [https://www.ird.gov.hk/eng/tax/dta\\_aeoi.htm](https://www.ird.gov.hk/eng/tax/dta_aeoi.htm) respectively, or simply scan the QR code, for more CRS and related information.
- 於本表格及其他相關文件所提供的僱主資料，包括姓名、商業登記號碼、公司註冊地、登記地址及營業地址等，會成為此自我證明的一部分。The Employer's Information, including name, business registration no., place of incorporation, registered address and business address, etc., provided in this form and other related documents form part of this self-certification.



(OECD)



(稅務局 IRD)

#### 閱讀上述注意事項後填寫下列部分 Complete following section after reading the Note above

##### (I) 實體之稅務居住地位 Entity's Tax Residence is

必須選擇其一

- ☐ 只有香港，及沒有處於任何其他司法管轄區的稅務居住地位 Hong Kong ONLY, with no tax residence in any other jurisdictions  
(如您已隨本申請表格遞交商業登記證核證副本，您可略過以下部分。If you have submitted the certified true copy of BR with this application, you may skip the part below.)
- ☐ 是香港(及其稅務編號請參考下面欄)及其他司法管轄區 Hong Kong (and the respective Taxpayer Identification Number (TIN) is as noted in below) AND also some other jurisdictions  
(請於下表列出所有香港以外其他司法管轄區的稅務編號。Please fill out the TIN for all other jurisdictions, other than HK, in the table below.)
- ☐ 不是香港而是其他司法管轄區。NOT Hong Kong, but instead some other jurisdictions (請填寫下表。Please fill out the table of Part (II) of this Section).

##### 稅務編號 Taxpayer Identification Number (TIN):

實體：已提供的香港商業登記號碼前八位數字 Entity: First 8 digits of the Hong Kong Business Registration Number provided

- (II) 請列明實體在當地為符合稅務目的之居民的所有司法管轄區(香港以外)以及該司法管轄區發出的稅務編號或具有等同功能的識別編號(TIN)。如下列位置不敷應用，請按以下格式另加新頁。Please list all jurisdictions (other than Hong Kong) where the Entity is a resident for tax purposes and Taxpayer Identification Number or its Functional Equivalent (TIN) for each jurisdiction. If the space provided is insufficient, please provide it in the below format on additional sheet(s).

稅務居民所在司法管轄區 Jurisdiction of Tax Residency	稅務編號 註1 TIN Remarks 1	若未能提供稅務編號，請於下方填上理由 A、B 或 C 註2 If no TIN available, please indicate Reason A, B or C below Remarks 2	若您選擇理由 B，請在下解釋無法取得稅務編號的原因 Please explain why you are unable to obtain a TIN if you have selected Reason B

#### 註 Remarks:

- 請參考上述注意事項第三項參考經合組織網站的稅務居民相關資料。  
Please refer to above Note (3) for tax residency related information on OECD website.
- 理由 A - 實體在當地的稅務居民的司法管轄區不向其居民發出稅務編號。  
Reason A: The jurisdiction where the Entity is a resident for tax purposes does not issue TINs to its residents.  
理由 B - 實體無法獲得稅務編號。(若您選擇這理由，請在上表解釋閣下無法獲得稅務編號的原因。)  
Reason B: The Entity is unable to obtain a TIN. (Please explain why you are unable to obtain TIN in the above table if you have selected this reason.)  
理由 C - 無需稅務編號。(註：只有在相關司法管轄區的主管當局不需要披露該司法管轄區發出的稅務編號方可選擇這理由。)  
Reason C: No TIN is required. (Note: Only select this reason if the authorities of the relevant jurisdiction of residence does not require the TIN to be disclosed.)
- 如欲了解自我證明表格內採用的名詞及措辭釋義，請瀏覽本公司網頁 <https://www.bocpt.com/homepage/zh-hk/faq/>  
For more information of the terms and expressions used in Self-Certification Forms, please visit our website at <https://www.bocpt.com/homepage/en/faq/>



自我證明表格名詞  
CRS Terms

## (II) 稅務居民身份自我證明(必須填寫) (續) SELF-CERTIFICATION OF TAX RESIDENCY (MUST FILL) (CONT'D)

### (III) 實體類別 (不適用於獨資經營者) Entity Type (Not applicable to sole-proprietorship)

在其中一個適當的空格內加上 ✓ 號，並提供有關資料。 Please ✓ one of the appropriate boxes and provide the relevant information.

#### 1. 財務機構 Financial Institution

- ☐ 託管機構、存款機構或指明保險公司 Custodial Institution, Depository Institution or Specified Insurance Company
- ☐ 投資實體，但不包括由另一財務機構管理（例如：擁有酌情權管理投資實體的資產）並位於非參與稅務管轄區的投資實體 Investment Entity, except an investment entity that is managed by another financial institution (e.g. with discretion to manage the entity's assets) and located in a non-participating jurisdiction

#### 2. 主動非財務實體 Active Non-Financial Entity ("NFE")

- ☐ 該非財務實體的股票經常在 \_\_\_\_\_ (一個具規模證券市場) 進行買賣 NFE the stock of which is regularly traded on \_\_\_\_\_, which is an established securities market
- ☐ 為 \_\_\_\_\_ 的有關連實體，該有關連實體的股票經常在 \_\_\_\_\_ (一個具規模證券市場) 進行買賣 Related entity of \_\_\_\_\_, the stock of which is regularly traded on \_\_\_\_\_, which is an established securities market
- ☐ 政府實體、國際組織、中央銀行或由前述的實體全權擁有的其他實體 NFE is a governmental entity, an international organization, a central bank, or an entity wholly owned by one or more of the foregoing entities
- ☐ 除上述以外的主動非財務實體 (請說明 \_\_\_\_\_)  
Active NFE other than the above (Please specify \_\_\_\_\_)

#### 3. 被動非財務實體 Passive Non-Financial Entity ("NFE")

- ☐ 不屬主動非財務實體的非財務實體 NFE that is not an active NFE
- ☐ 位於非參與稅務管轄區並由另一財務機構管理的投資實體 Investment entity that is managed by another financial institution and located in a non-participating jurisdiction

每位被動非財務實體的控權人需提供其稅務居民身份自我證明。

For Passive NFE, Tax Residency Self-Certification for each Controlling Person is required.

如實體類別是 **被動非財務實體**，才須填寫此部分。  
Complete this part if the entity type is a **passive NFE**.

#### (I) 控權人 Controlling Persons

就帳戶持有人，填寫所有控權人的姓名在列表內。就法人實體，如行使控制權的並非自然人，控權人會是該法人實體的高級管理人員。每名控權人須分別填寫一份 **自我證明表格 – 控權人**。Indicate the name of all controlling person(s) of the account holder in the table below. If no natural person exercises control over an entity which is a legal person, the controlling person will be the individual holding the position of senior managing official. Complete **Self-Certification Form – Controlling Person** for each controlling person.

(1)	(5)
(2)	(6)
(3)	(7)
(4)	(8)

**警告：根據《稅務條例》第 80(2E)條，如任何人在作出自我證明時（包括此處描述構成自我證明的一部分的內容），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，即屬犯罪。一經定罪，可處第 3 級（即 HK\$10,000）罰款。**  
**WARNING: It is an offence under section 80(2E) of the Inland Revenue Ordinance if any person, in making a self-certification (comprising the contents herein described as forming parts of the 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. A person who commits the offence is liable on conviction to a fine at level 3 (i.e. HK\$10,000).**

### (III) 聯絡人資料及公司帳戶持有人身份證明 CONTACT PERSON DETAILS AND IDENTIFICATION DOCUMENTS OF ACCOUNT HOLDER

1. 聯絡人  
Contact Person

☐ 先生 Mr ☐ 女士 Ms

姓 Surname

名 Given name

職銜/職位 Title /Position

電郵地址 E-mail Address

傳真號碼 Fax No

(852)

本地流動電話號碼 Local Mobile Phone No.

辦公室電話號碼 Business Phone No

倘為有限公司或合夥經營公司，本表格授權簽署人及另一位公司董事/合夥人請提供其身份證明文件之核證副本（合共兩人，如適用）。

For limited company or partnership, please provide the certified true copies of identification documents of the authorized signatories of this form and another company director/partner (total 2 persons, if applicable).

2. 公司董事/合夥人  
Director/Partner

(1)

全名 Full Name (必須與香港身份證/護照相同 as shown on HKID/Passport)

香港身份證/護照號碼 HKID/ Passport No. (請附上香港身份證之核證副本。如非持有香港永久性居民身分證，請提供香港身份證及護照之核證副本 Please provide a certified true copy of HKID card. If NOT holders of HK permanent ID card, please provide a certified true copy of HKID card and Passport)

住宅地址 Residential Address

(2)

全名 Full Name (必須與香港身份證/護照相同 as shown on HKID/Passport)

香港身份證/護照號碼 HKID/ Passport No. (請附上香港身份證之核證副本。如非持有香港永久性居民身分證，請提供香港身份證及護照之核證副本 Please provide a certified true copy of HKID card. If NOT holders of HK permanent ID card, please provide a certified true copy of HKID card and Passport)

住宅地址 Residential Address

### (IV) 計劃詳情 SCHEME DETAILS

1. 計劃開始日期

Scheme Commencement Date

日 DD 月 MM 年 YYYY

2. 參與僱員人數

No. of Participating Employee(s)

3. 供款期

Contribution Period

- ☐ 每月：由每月 1 號至該月底。  
Monthly: from 1st day of the month to that month end.
- ☐ 每半月：由每月第 1 日至第 15 日及第 16 日至該月底。  
Semi-Monthly: from 1st to 15th day of the month and 16th day to that month end.
- ☐ 其他，請註明：  
Others, please specify: \_\_\_\_\_

如僱主擬作自願性供款，請填寫“自願性供款表格附頁”。

For employers intending to make voluntary contributions, please specify the details in “Supplementary Voluntary Contribution Form”.

4. 付款方法

Payment Method

- ☐ 自動轉賬 (請填妥直接付款授權書) Autopay (Please complete Direct Debit Authorization Form)
- ☐ 支票 Cheque

### (V) 利益轉移詳情 DETAILS OF TRANSFER BENEFITS

如僱用選擇由其他計劃轉入累算權益，請填妥此部份。Complete this section only if Employer intends to transfer accrued benefits from another scheme.

轉移信託人名稱 Name of Transferor Trustee: \_\_\_\_\_

- ☐ 成員之累算權益由其他強積金計劃轉入 (請填寫“參與僱主資金轉移申請表”<第 MPF(S)-P(E)號表格>)。  
Accrued benefits of members transferred from another MPF Scheme (please complete the “Participating Employer’s Request For Fund Transfer Form” <Form MPF(S)-P(E)>).
- ☐ 成員之累算權益由職業退休計劃轉入 (請提供職業退休計劃之信託契約/保單的副本)。  
Accrued benefits of members transferred from ORSO Scheme (please provide the copy of trust deed/policy of the transferred ORSO scheme).
- ☐ 轉移自願性供款之歸屬比例，於“自願性供款表格附頁”說明詳情 (請填寫“自願性供款資料附頁”<MY SUPA FORM>)。  
Vesting Scale of Transfer Voluntary Contribution, is provided in “Supplementary Voluntary Contribution Form” (Please complete the “Supplementary Voluntary Contribution Form”<MY SUPA FORM>).

## (VI) 強積金賬戶進階登入功能 MPF ACCOUNT ADVANCED MODE LOGIN

### 重要事項 Important Note

- 成功申請僱主進階登入功能後，「獲授權管理賬戶人士」(即本部所填報之獲僱主授權人士) 每次登入僱主網上強積金賬戶，一個一次性密碼會發送到本部提供之「指定電郵地址」，以核對賬戶使用者身份(請注意該密碼於發出 30 分鐘後便失效)。請確保有關電郵地址正確有效，以便日後正常接收一次性密碼。  
For identity authentication purposes, a one-time password will be sent to the Designated E-mail Address specified in this Part **each and every time** when the person authorized by the Employer under below. ("Authorised Account Administrator") gains access to the Advanced Mode Login functions after successful application. **The one-time password will expire within 30 minutes upon request.** Please ensure the validity of the email address to well receive the onetime password(s) in the future.
- 僱主日後如需更改獲授權管理賬戶人士及/或指定電郵地址，請儘快填寫及遞交表格以作通知。  
Please inform us of any changes made to the Authorised Account Administrator, and/or Designated E-mail Address, by completing and returning required form as soon as reasonably practicable.
- 獲授權管理賬戶人士可於登入僱主網上賬戶後，於「登入賬戶設定」重設其賬戶名稱及基本登入密碼，而無須填寫本申請表。  
Authorised Account Administrator can access "Login Account Setting" on Employer's on-line MPF account to reset his/her User Name and Password setting without completing form.
- 請妥善保管進階登入密碼，確保閣下之僱員個人資料安全。  
Please keep your Advanced Mode Login password(s) secret and ensure that your employer's personal information is well protected.

### 授權資料 Authorization Details

- 本公司現授權以下人士代表本公司使用僱主網上強積金賬戶進階登入功能，由中銀國際英國保誠信託有限公司(「受託人」)接納申請之日起生效直到本公司另行通知為止。  
We hereby assign the following Authorised User(s) to gain access to the Advanced Mode Login functions of on-line MPF account on behalf of the Employer. This authorization shall remain valid and in effect from the date when this request is accepted by BOCI-Prudential Trustee Limited (the "Trustee") until further notification is given.
- 本公司同意，在取消或更改本授權之任何通知，須於取消/更改生效日最少兩個工作天之前交予受託人。  
We agree that any notice of cancellation or variation of this authorization which we may give to the Trustee shall be given at least two working days prior to the date on which such cancellation/variation is to take effect.

獲授權管理賬戶進階登入人士姓名(只供一位使用者) Authorised account administrator of using Advanced Mode Login Service (For one person only)	獲授權管理賬戶進階登入功能之人士指定電郵 (必須填寫) Designated E-mail Address of Authorised account administrator of using Advanced Mode Login Service (Compulsory)

## (VII) 僱主授權簽字人 AUTHORIZED SIGNATORIES FOR EMPLOYERS

### 授權資料 AUTHORIZATION DETAILS

除簽定本表格(IX)部的授權簽署人外，本公司現授權以下人員代表本公司簽署任何本參與計劃之文件、書信及其他通知書，直至本公司另行通知為止。如留空此部分，則本表格(IX)部的任何一位授權簽署人將被視為獲授權處理以上之事項。 Apart from the authorized signatories in Part (IX) of this form, we, hereby authorize the following persons to sign on behalf of employer on any Scheme documents, letters, notifications & other correspondences related to the Participating Scheme. This authorization shall remain valid till further notification is given. If this Part is left blank, any one of the authorized signatures appearing in Part (IX) of this form shall, on its own, be deemed to be authorized for the same purposes as referred above.

註 Remark: 所有授權簽字人必須提供身份證明文件的核證副本。 All authorized signatories MUST provide certified true copies of identification documents.

<div>(1)</div> <div>全名 Full Name (必須與香港身份證/護照相同 as shown on HKID/Passport)</div> <div>香港身份證/護照號碼 HKID/Passport No. (請提供香港身分證之核證副本。如非持有香港永久性居民身分證，請提供香港身份證及護照之核證副本 Please provide a <u>certified true copy</u> of HKID card. If NOT holders of HK permanent ID card, please provide a <u>certified true copy</u> of HKID card and Passport)</div> <div>職銜/職位 Title/Position</div> <div>國籍(國家/地區) Nationality (Country/Region)</div> <div>簽署式樣 Specimen Signature</div> <div>住宅地址 Residential Address:</div>	<div>(2)</div> <div>全名 Full Name (必須與香港身份證/護照相同 as shown on HKID/Passport)</div> <div>香港身份證/護照號碼 HKID/Passport No. (請提供香港身分證之核證副本。如非持有香港永久性居民身分證，請提供香港身份證及護照之核證副本 Please provide a <u>certified true copy</u> of HKID card. If NOT holders of HK permanent ID card, please provide a <u>certified true copy</u> of HKID card and Passport)</div> <div>職銜/職位 Title/Position</div> <div>國籍(國家/地區) Nationality (Country/Region)</div> <div>簽署式樣 Specimen Signature</div> <div>住宅地址 Residential Address:</div>
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## (VIII) 中銀保誠信託收集個人資料聲明 BOCPT PERSONAL INFORMATION COLLECTION STATEMENT ("BOCPT PICS")

申請人／成員明白及同意中銀國際英國保誠信託有限公司（「中銀保誠信託」）可將收集的任何個人資料（不論從本申請表或以其他途徑收集）作以下用途：  
Applicant / Member(s) understand(s) and consent(s) that, any personal data collected by BOCI-Prudential Trustee Limited ("BOCPT") (whether collected in this application form or otherwise) may be used by BOCPT for the following purposes:

- (i) 處理，管理，實施及執行本文件或任何其他申請人／成員可能不時提交給中銀保誠信託的文件或文件中涉及的要求或交易；  
Processing, administering, implementing and effecting the requests or transactions contemplated in this document or any other documents applicant / member(s) may submit to BOCPT from time to time;
- (ii) 中銀保誠信託的新產品設計或提升現有產品及服務；  
Designing new or enhancing existing products and services provided by BOCPT;
- (iii) 進行客戶調查；  
Conducting customer surveys;
- (iv) 為申請人／成員甄選及參與獎賞、忠誠或特選計劃及相關服務；  
Selecting and participating in reward, loyalty or privileges program and related service for applicant / member(s);
- (v) 與申請人／成員進行通訊，包括向申請人／成員發送可與中銀保誠信託有關任何申請人／成員賬戶的行政通訊或有關未來收集個人資料聲明的變更；  
Communicating with applicant / member(s) including to send applicant / member(s) administrative communications about any account applicant / member(s) may have with BOCPT or about future changes to this PICS;
- (vi) 與上述任何一項直接相關的其他目的；  
Other purposes directly relating to any of the above;
- (vii) 遵守適用的法律、法規或法院命令。  
Complying with applicable laws, regulation or court order.

中銀保誠信託也可使用申請人／成員的聯絡資料，人口統計資料，投資選擇及累積權益，就有關計劃的產品的推廣資訊，包括電話、郵件、電子郵件、電話短訊或任何電子信息等方法聯絡申請人／成員。除非得到申請人／成員同意(包括表示不反對)，否則中銀保誠信託不可使用申請人／成員資料為該用途。如果申請人／成員不同意接收該等推廣資訊，請在本表格的「(IX) 部分- 聲明，參與協議及簽署」下的適當方格中填上剔號。

BOCPT may also use applicant / member(s)' contact details, demographic information, investment choices and accrued benefits to contact applicant / member(s) with marketing information regarding the Scheme, including by phone calls, mail, email, SMS or any type of electronic message. BOCPT may not so use applicant / member(s)' data unless BOCPT has received applicant / member(s)' consent (which includes an indication of no objection). Tick the box in appropriate area under "Part (IX) – Declaration, Participation Agreement and Signature" in the form if the applicant / member(s) do(es) not consent to receive such marketing information.

中銀保誠信託所持有申請人／成員的有關個人資料將被保密，但中銀保誠信託可為以下目的披露申請人／成員的個人資料予：

Personal data held by BOCPT relating to applicant / member will be kept confidential but BOCPT may disclose member(s)' personal data for the following purposes:

- (a) 申請人／成員的銀行作繳款用途；  
To applicant / member(s)' bank for payment purposes;
- (b) 申請人／成員的強積金中介人；  
To applicant / member(s)' MPF intermediaries;
- (c) 中銀保誠信託的關連公司（根據《公司條例》的定義）包括保險公司和金融服務機構；  
To BOCPT's related companies (as defined in the Companies Ordinance) including insurance companies and financial services companies;
- (d) 任何提供行政管理，數據處理，電信，計算，繳款，收債或證券清算，技術外判，客戶熱線服務中心，郵寄及印刷服務的中介、承包商或第三方服務供應商（不論在中銀保誠信託之內或之外及中銀保誠信託的關連公司）與中銀保誠信託相關公司的業務運作有關的服務，以及向申請人／成員提供的服務；  
To any agent, contractor or third party service provider (within or outside BOCPT and BOCPT's related companies) who provides administration, data processing, telecommunications, computer, payment, debt collection or securities clearing, technology outsourcing, call center services, mailing and printing services in connection with the operation of the business of BOCPT and BOCPT's related companies and provision of BOCPT services to applicant / member(s);
- (e) 其他協助收集申請人／會員信息或與申請人／成員聯繫的公司，例如研究公司和評級機構，以增強中銀保誠信託向申請人／成員提供的服務；  
To other companies who help gather applicant / member(s)' information or communicate with applicant / member(s), such as research companies and rating agencies, in order to enhance the services BOCPT provide to applicant / member(s);
- (f) 根據任何法律，法規或法院命令的要求，對中銀香港或其關連公司（在香港境內或境外）有義務向其披露的任何人，該法律，法規或法院命令對中銀香港或其關連公司具有約束力公司（在香港境內或境外）應受監管機構或其他機構發布的任何準則的約束或根據其目的，或受其約束，或根據這些目的或目的，由中銀香港或其關連公司（香港境內或境外）遵守；  
To any person to whom BOCPT or its related companies (inside or outside Hong Kong) is under an obligation to make disclosure under the requirements of any law, regulation or court order binding on or applying to or to which BOCPT or its related companies (inside or outside Hong Kong) is subject to, or under and for the purposes of any guidelines issued by regulatory or other authorities with which BOCPT or its related companies (inside or outside Hong Kong) is expected to comply;
- (g) 有關僱主；及  
Relevant employer(s); and
- (h) 按法例要求或准許的其他人仕。  
As otherwise required or permitted by law.

中銀保誠信託也可就法例准許或於獲得申請人／成員的同意後披露或將申請人／成員的個人資料作其他用途。

BOCPT may also use and disclose member(s)' personal data in other ways with applicant / member(s)' consent or as otherwise required or permitted by law.

申請人／成員明白申請人／成員所提供之個人資料均屬自願，但如未能提供所要求的資料將可能導致中銀保誠信託無法處理申請人／成員的申請。申請人／成員有權要求查閱及更改由中銀保誠信託持有的任何個人資料。如有此需要，請致函香港太古城英皇道 1111 號 15 樓 1507 室，向中銀國際英國保誠信託有限公司資料保障主任提出。

Applicant / Member(s) understand(s) that the information applicant / member(s) provided is on voluntary basis, but failure to provide the requested personal data may mean BOCPT is unable to process applicant / member(s)' application. Applicant / Member(s) has / have the right to seek access to and request correction of any personal data BOCPT holds by sending a written request to the Data Protection Officer of BOCI-Prudential Trustee Limited at Suite 1507, 15/F, 1111 King's Road, Taikoo Shing, Hong Kong.

中銀保誠信託收集個人資料聲明的修訂：

中銀保誠信託保留權利可隨時且在無須通知的情況下增添、修改、更新或修訂上述收集個人資料聲明，我們僅知會閣下有關係修改、更新或修訂。倘我們決定修改我們的個人資料政策，我們將於我們的網站或以書面形式知會閣下有關係修改，從而讓閣下能得悉我們所收集的資料、我們如何使用該資料及在何種情況下會披露該資料。任何有關修改、更新或修訂將在刊登後即時生效。

Amendments to BOCPT PICS:

BOCPT reserves the right, at any time and without notice, to add to, change, update or modify the above PICS, simply by notifying you of such change, update or modification. If we decide to change our personal data policy, those changes will be notified to you either on our website or in writing so that you are always aware of what information we collect, how we use the information and under what circumstances the information is disclosed. Any such change, update or modification will be effective immediately upon posting.



## (IX) 聲明、參與協議及簽署 DECLARATION, PARTICIPATION AGREEMENT AND SIGNATURE

- (1) 我們確認已收到並閱讀最新版本之本計劃的強積金計劃說明書(及其附錄)。我們謹此接受及同意受此強積金計劃說明書(及其附錄)之條款、成立本計劃之信託契約(包括其後之修訂契約)、信託契約內之規則及日後根據信託契約之條款向我們不時發出有關之通知所約束。  
We confirm that we have received and read the latest version of the MPF Scheme Brochure (and any addenda thereto) of the Scheme. We hereby accept and agree to be bound by the terms of such MPF Scheme Brochure (and addenda thereto), the trust deed constituting the Scheme (including any deed of amendment), the rules thereof and any other notification sent to us from time to time pursuant to the terms of the trust deed.
- (2) 我們證實此申請表內所提供之資料於各方面均為真實及正確。我們並承諾若所提供之資料有任何更改,將儘快通知中銀國際英國保誠信託有限公司。  
We confirm that all the information provided in this application form is true and accurate in all aspects. We further undertake that if there is any change in the information so provided, we shall notify BOCI-Prudential Trustee Limited as soon as reasonably practicable.
- (3) 我們謹此同意遵守《強制性公積金計劃條例》(第 485 章)及其有關規例中作為僱主之責任之規定。  
We hereby further agree to comply with the obligations imposed on us as an employer under the Mandatory Provident Fund Schemes Ordinance (Cap. 485) and its related regulations.
- (4) 本人確認已閱讀、明白及同意(VIII)部內的中銀保誠信託收集個人資料聲明。  
I confirm that I have read, understood and agreed to the BOCPT Personal Information Collection Statement in Part (VIII).
- (5) 我們知悉及同意,受託人可把收集所得的資料交給稅務局以將資料交到另一稅務管轄區的稅務當局,以作自動交換財務帳戶資料用途以遵守稅務法律及規例(包括但不限於《稅務條例》(第 112 章)和根據自動交換資料有關的經濟合作與發展組織(OECD)《通用報告準則》(CRS)的規則)。  
We acknowledge and agree that the data collected may be transmitted by the Trustee to the Inland Revenue Department which may further exchange such information to the competent authority of another reportable jurisdiction for the purpose of Automatic Exchange of Financial Account Information ("AEOI") in compliance with tax law and regulations (including but not limited to the Inland Revenue Ordinance (Cap.112) and regulations based on the Organisation for Economic Co-operation and Development (OECD) Common Reporting Standard (CRS) for automatic exchange of information).
- (6) 我們承諾,如實體的稅務居民身分及/或控權人的自動交換財務帳戶資料紀錄有所改變,必須在改變後的 30 天內通知受託人有關的改變並提供最新的自我證明表格。  
We undertake to notify the Trustee and provide an updated Self-Certification form within 30 days if there is any change in circumstances relating to the tax residency status of the Entity and/or Automatic Exchange of Financial Account Information about controlling person(s).
- (7) 我們謹此聲明,強積金中介人(附屬中介人)已確認 (i)他/她擁有相關監管/政府機構發出之有效執照 (ii)他/她將遵守《個人資料(私隱)條例》以使用或處理相關資訊。  
We declare that the MPF intermediary ("Subsidiary Intermediary") has confirmed that (i) he / she holds valid licenses issued by the relevant regulatory / governmental authority; and (ii) he / she shall comply with the provisions of the Personal Data (Privacy) Ordinance when using or handling the Information.
- (8) 我們知悉及同意, (i)受託人在主事中介人及/或附屬中介人提供/使用其資訊的服務、準確性和完整性上並無代表權及法律責任;及(ii)受託人在因主事中介人及/或附屬中介人濫用或披露資訊予任何其他第三者而對本人引起之任何損害上並無責任。  
We acknowledge and accept that (i) the Trustee makes no representation and accepts no legal responsibility for the services, the accuracy and completeness of the Information provided and / or used by the Principal Intermediary and / or the Subsidiary Intermediary; and (ii) the Trustee shall not be held liable for any damages caused to me which may arise out of or in connection with the misuse of the Information or disclosure of the Information to any third party / parties by the Principal Intermediary and / or the Subsidiary Intermediary.
- (9) 我們知悉及接受,強積金中介人同意書將與本表格同時生效,並保持其效力直至(i)本人遞交「撤銷同意披露資料予強積金中介人資料通知書 - 僱主/個人 (除僱員成員)」以撤銷;及(ii)受託人獲悉及接收其「撤銷同意披露資料予強積金中介人資料通知書 - 僱主/個人 (除僱員成員)」。  
We acknowledge and agree that the MPF Intermediary Authorization shall take effect on the date of this form and remain in force unless and until (i) it is revoked by me by submitting the "Revocation Notice for Consent of Disclosure of Particulars to MPF Intermediary – Employer/Individual (Other than Employee Member)"; and (ii) the Trustee has been notified of and has received the "Revocation Notice for Consent of Disclosure of Particulars to MPF Intermediary – Employer/Individual (Other than Employee Member)".
- (10) 我們同意及接受,「撤銷同意披露資料予強積金中介人資料通知書 - 僱主/個人 (除僱員成員)」將於受託人接收後十四天內生效,並以較晚者為準。  
We agree and accept that the "Revocation Notice for Consent of Disclosure of Particulars to MPF Intermediary – Employer/Individual (Other than Employee Member)" shall take effect within 14 days after the Trustee receives the Form, whichever is the later.
- (11) 本人/我們同意授權受託人接受所有以僱主進階登入功能遞交的資料和指示,而毋須另行核實;本人/我們並對該等資料和指示承擔責任。  
I/We agree to authorize the Trustee to accept without any further verification on all information and instructions that the Trustee receives via the Advanced Mode Login functions. I/We agree to be held responsible for such information and instructions.
- (12) 本人/我們同意賠償受託人因接受本人/我們提供的指定電郵地址,並將一次性進階登入密碼傳送至該等電郵地址,以及執行獲授權管理帳戶人士網上指示而直接或間接導致受託人蒙受相關的任何法律行動、債務、費用、索償、損失、損害、訴訟或開支,本人/我們將向受託人作出賠償(包括以全面彌償基準承擔法律費用、收費及開支)。受託人毋須因執行獲授權管理帳戶人士網上指示而直接或間接導致的任何法律行動、債務、費用、索償、損失、損害、訴訟或開支而承擔責任。然而,受託人有權決定何種表格或其他指示文件能否以電郵方式傳遞。  
I/We agree to indemnify the Trustee against any action, liability, cost, claim, loss, damage, proceeding or expense (include legal fees, costs and expenses on a full indemnity basis) suffered by the Trustee arising either directly out of or in connection with the Trustee accepting the Designated E-mail(s) Address furnished by me/us, sending the one-time Advanced Mode Login password(s) as well as executing the on-line instruction(s) given by Authorised Account Administrator. Notwithstanding the above, the Trustee has the right to determine which forms or other documents of instructions may or may not be transmitted via e-mail.
- (13) 本人/我們確認此申請表內提供之資料於各方面均為真實及正確。我們並承諾若所提供之資料有任何更改,將儘快通知受託人。  
I/We confirm that all the information provided in this application form is true and accurate in all aspects. We further undertake that if there is any change in the information provided herein, we shall notify the Trustee as soon as reasonably practicable.
- (14) 本人/我們確認作出此申請前,已閱讀、明白受託人網站 [www.bocpt.com](http://www.bocpt.com) 「互動話音系統及互聯網服務的細則與條款」,並同意受其約束。  
I/We confirm that we have read, understood and agreed to be bound by the "Terms and Conditions for Internet and Interactive Voice Response System Services" on the Trustee's website [www.bocpt.com](http://www.bocpt.com) before submitting this application.
- (15) 本人/我們明白受託人保留接受或拒絕此項申請之最終酌情權利。  
I/We acknowledge the Trustee reserves the right to accept or reject our request in its sole discretion.
- ☐ 如閣下不欲個人資料用作上述直接促銷用途,請在方格內填上剔號(此指示適用於閣下於本公司強積金計劃開立之所有帳戶(包括本公司其他強積金計劃、職業退休計劃及/或所有將來開立之帳戶))。  
Please tick if you do not wish your personal data to be used for the above direct marketing purpose (this instruction applies to all your accounts set up under our MPF/ORSO schemes (including all our other MPF/ORSO schemes and/or any further accounts set up in the future)).

### 參與協議 PARTICIPATION AGREEMENT

#### 立約方 Parties:

- 中銀國際英國保誠信託有限公司,其註冊地址為香港太古城英皇道 1111 號 15 樓 1501-1507 及 1513-1516 室(「受託人」);及 BOCI-Prudential Trustee Limited whose registered office is at Suites 1501-1507 & 1513-1516, 15/F, 1111 King's Road, Taikoo Shing, Hong Kong (the "Trustee"); and
- 本申請表(I)部第 1 項所列之公司,其註冊/通訊地址為列於本表格(I)部第 4 項/第 6 項(「僱主」)。  
The employer named in Part (I)1 of this application form whose registered office/correspondence address is at Part (I)4/6 of this application form (the "Employer").

#### 鑑於 Recitals

- 受託人為我的強積金計劃(「集成信託計劃」)之受託人,該計劃乃根據受託人於 2010 年 4 月 7 日簽訂之契約(及不時就該契約所作出的修訂,「契約」)而成立。  
The Trustee is the trustee of the My Choice Mandatory Provident Fund Scheme (the "Master Trust Scheme"), which was established by a deed dated 7 April 2010 made by the Trustee (as amended from time to time, the "Deed").
- 僱主擬參與集成信託計劃,以設立一個退休福利計劃(「參與計劃」),為其僱員提供福利。  
The Employer wishes to join the Master Trust Scheme in order to establish a retirement benefits scheme (the "Participating Plan") for the benefit of its employees.
- 參與計劃受契約及本參與協議規限。  
The Participating Plan shall be governed by the Deed and this Participation Agreement.



## (IX) 聲明、參與協議及簽署 (續) DECLARATION, PARTICIPATION AGREEMENT AND SIGNATURE (CONT'D)

### 運作條款 Operative provisions

- 除了下列定義或本參與協議另有規定，相同的詞彙於本參與協議內跟其於契約內具有相同涵義。Except for the following definitions or as otherwise indicated in this Participation Agreement, words and expressions used in this Participation Agreement shall have the meanings given to them in the Deed.  
「非法定正常退休年齡」指就參與計劃而言，註明於申請表的年齡；Non-Statutory Normal Retirement Age means in relation to the Participating Plan, as specified in the Application Form, at such years of age;  
「非法定提早退休年齡」指就參與計劃而言，註明於申請表的年齡；Non-Statutory Early Retirement Age means in relation to the Participating Plan, as specified in the Application Form, at such years of age;  
「服務年資」指就參與計劃而言，申請表內所註明為計算利益歸屬或釐定供款的服務年資。Years of Service means in relation to the Participating Plan, as vesting of benefits or calculating contributions is concerned, the length of service with the Employer as indicated in the Application Form.
- 僱主於此設立一個由契約及本參與協議條款規管之參與計劃，自申請表內註明之計劃開始日期起生效。With effect from the scheme commencement date as specified in the Application Form, the Employer hereby establishes a Participating Plan to be governed by the terms of the Deed and this Participation Agreement.
- 僱主於此向受託人承諾遵守契約及本參與協議之條款，以及所有適用的法律與規例，並受其約束。The Employer hereby covenants with the Trustee to comply with and be bound by the provisions of the Deed and this Participation Agreement and all applicable laws and regulations.
- 僱主保證其不時就每名僱員成員之供款、年齡、薪金、有關入息、受聘日期及最後受聘日期、服務年期、利益及其他方面提供之資料（不論是否在申請表內列明）在各方面均為正確。The Employer warrants that the information from time to time to be provided by the Employer (whether in the Application Form or otherwise) in relation to contributions and as to the age, salary, relevant income, date of employment and last date of employment, length of service, benefits and otherwise in relation to each Employee Member will be correct in all respects.
- 受契約及本參與協議的條款規限，僱主承諾及同意對受託人就下列情況招致的任何與集成信託計劃或參與計劃有關的訴訟、索賠、索求或法律程序帶來的法律費用、收費、法律責任及支出作出彌償 Subject to the provisions of the Deed and this Participation Agreement, the Employer undertakes and agrees to hold the Trustee indemnified against any and all proceedings, costs, charges, liabilities and expenses occasioned by any and all actions, claims, demands or proceedings in connection with the Master Trust Scheme or the Participating Plan either:
  - 僱主違反第 4 段所載的保證；或 arising out of the breach by the Employer of the warranty referred to in paragraph 4; or
  - 若僱主因任何失誤或遺漏而未能適當地及準時無誤地執行或遵守其於契約及本參與協議條款就該位僱主及其僱員成員（不論該等責任是與該位僱主及僱員成員，或連同其他參與計劃之另一僱主及其他的僱員成員或自僱成員或特別自願性供款成員或個人帳戶成員有關）的任何責任。as a result of any failure or omission on the part of the Employer to duly and punctually perform or observe any obligations pursuant to the Deed and this Participation Agreement or otherwise so far as they relate to the Employer and Employee Members of the Participating Plan (whether they relate to the Employer and Employee Members alone or together with another Employer and Employee Members or SEP Member or SVC Member or Personal Account Member of other Participating Plans.
- 僱主承諾及同意支付契約及本參與協議條款需支付的所有費用及支出。The Employer undertakes and agrees to pay all fees and expenses which are payable by it under the terms of the Deed and this Participation Agreement.
- 就契約規則第 3.1 條(j)項而言，僱主及受託人同意供款期為僱主於申請表內所指定的供款安排或於指定的供款期作出供款前以書面通知受託人後所作出的更改安排。For the purpose of Rule 3.1(j) of the Deed, the Employer and the Trustee agree that the contribution period shall be in the manner as indicated by the Employer in the Application Form or otherwise notified in writing to the Trustee prior to making contribution for each such contribution period.
- 若僱主選擇為僱員成員作出自願性供款：In the event that the Employer elects to make Voluntary Contributions on behalf of its Employee Members,
  - 僱主須向受託人提供自願性供款資料附頁內註明所需的資料及受託人不時合理要求的其他資料；the Employer shall provide the Trustee with such information as may be specified in the Supplementary Voluntary Contribution Form and any other information which the Trustee may from time to time reasonably require;
  - 但凡有關人士要求作出及提取自願性供款，及其就該等供款的權利與義務，均受載於契約及本參與協議內之條款，以及自願性供款資料附頁內已呈交上受託人的資料所管轄，但僱主可按契約規則第 3.2 條(b)(iv)項全權決定更改就任何僱員成員的僱主自願性供款率；但如該項更改將損害成員在參與計劃下的累算權益或既有利益，則須獲得強制性公積金計劃管理局之批准；及 the making and withdrawal of such Voluntary Contributions and the rights and obligations of the parties relating thereto shall be governed by the provisions of the Deed, this Participation Agreement and the information submitted to the Trustee in the Supplementary Voluntary Contribution Form PROVIDED THAT the Employer may in its sole discretion change the Employer's Voluntary Contribution Rate in respect of any Employee Member in accordance with Rule 3.2(b)(iv) of the Deed and such change shall be subject to the approval of the MPF Authority if it shall have detrimental effect on the members' vested benefits or accrued rights under the Participating Plan; and
  - 歸屬於有關僱員成員的僱主自願性供款之金額將基於僱員成員之職位及服務年資並按自願性供款資料附頁內註明之歸屬比例計算，但僱主給予受託人三個月事先通知（或在受託人同意下所給予之較短通知）後，可更改就任何僱員成員的歸屬比例，但如僱員成員之累算權益或既有利益因歸屬比例更改而有所損害時，僱主便不能作出有關更改，除非得到受影響之僱員成員之書面同意。再者，僱主知道該項更改須在獲得強制性公積金計劃管理局之批准後方可生效。the amount of Employer's Voluntary Contribution to be vested in the relevant Employee Member shall be determined based on the position and number of Years of Service of the Employee Member in accordance with the vesting scale as specified in the Supplementary Voluntary Contribution Form PROVIDED THAT the Employer may change the vesting scale by giving 3 months' prior notice to the Trustee (or such shorter period of notice as the Trustee may agree) PROVIDED FURTHER THAT if a change in the vesting scale will have detrimental effect on any Employee Member's vested benefits or accrued rights, the Employer shall not be allowed to effect such a change unless the prior written consent of the Employee Member concerned has been obtained. In addition, the Employer is aware that such change shall require approval from the MPF Authority before the change can take effect.
- 本參與協議須按照契約規則第 21 條(終止參與本計劃(可扣稅自願性供款成員除外))而終止。This Participation Agreement shall be terminated in accordance with Rule 21 (Cessation of Participation in the Scheme(Excluding TVC Members)) of the Deed.
- 本參與協議受香港特別行政區法律管轄。This Participation Agreement shall be governed by the laws of Hong Kong Special Administrative Region.

### 執行簽訂 Execution

本參與協議由各方在本協議註明的日期簽署，以資證明。IN WITNESS whereof this Participation Agreement has been entered into the day and year written.

本參與協議於\_\_\_\_\_ (日期)簽訂

THIS PARTICIPATION AGREEMENT is made on\_\_\_\_\_ (date)

(IX) 聲明、參與協議及簽署 (續) DECLARATION, PARTICIPATION AGREEMENT AND SIGNATURE (CONT'D)

請同時遞交以下所需文件 Please submit the following documents together with this application

- ☐ 如實體類別是被动非財務實體：每名控權人須分別填寫一份“自我證明表格 – 控權人”  
If the entity type is a passive NFE: Each controlling person should complete a “Self-Certification Form – Controlling Person”
- ☐ 獨資經營者或個人：“自我證明表格 – 個人”  
Sole proprietor or Individual: “Self-Certification Form – Individual”
- ☐ 所有授權簽字人必須提供身份證明文件的核證副本  
All authorized signatories MUST provide certified true copies of identification documents.

注意：授權簽署人應為公司董事/獨資經營者/合夥人/(非法人團體) 最終擁有人或管理人，否則，須提供有關授權文件（例如董事會決議）之核證副本。  
Note: The authorized signatory should be the director/sole proprietor/partner/ (for unincorporated body) ultimate owner or controller, if not, a certified true copy of the authorisation document (e.g. Board Resolution) must be provided.

授權簽署及公司印章 Authorized Signature(s) with Company Chop	簽署人姓名 (全名) Name of Signatory(ies) in full name	
	香港身份證/護照號碼 HKID/ Passport No. (請提供香港身分證之核證副本。如非持有香港永久性居民身分證，請提供香港身份證及護照之核證副本。Please provide a certified true copy of HKID card. If NOT holders of HK permanent ID card, please provide a certified true copy of HKID card and Passport)	
	職銜/職位 Title/Position	國籍(國家/地區) Nationality (Country/Region)
	日期 Date (日 DD/月 MM/年 YYYY)	

中銀國際英國保誠信託有限公司 BOCI-Prudential Trustee Limited
授權代表 Authorized Signature

(X) 強積金中介人聲明及簽署 MPF INTERMEDIARY DECLARATION AND SIGNATURE

本人謹此聲明及確認，本人在使用以上成員的資料時，將遵守個人資料(私隱)條例、強制性公積金計劃條款及全部其他適用之條款、規則和指引，以及相關機構發出的(或不時修改的)行為準則。  
I declare and confirm that I shall comply with the Personal Data (Privacy) Ordinance, the Mandatory Provident Fund Schemes Ordinance and all other applicable ordinances and rules, guidelines and code of conduct issued by (or as amended from time to time) the relevant authorities when using the above Member's Information.

強積金中介人簽署 Signature of MPF Intermediary	強積金中介人姓名 (全名) Name of MPF Intermediary (Full Name)
	聯絡電話 Contact Number
	日期 Date (日 DD/月 MM/年 YYYY)

代理/ 銀行職員資料 Agent / Bank Staff Information	
1. 銀行編號 Bank Code	
2. 分行編號 Branch Code	
3. 強積金中介人註冊編號 MPF Intermediary Registration No.	
4. 代理/銀行職員姓名 Agent/Bank Staff Name	
5. 代理/銀行職員編號 Agent/Bank Staff Code	

**業務性質****Nature of Business**

(CLEA) 清潔服務 Cleaning Service  
 (CONT) 建築/工程/翻新 Construction/Engineering/ Renovation  
 (ENTE) 娛樂 Entertainment  
 (FINA) 金融/保險/投資 Finance/Insurance/Investment  
 (HEAL) 醫務/藥物/化學 Health/Pharmaceuticals/Chemical  
 (MANU) 製造業 Manufacturing  
 (NURS) 療養院 Nursing Home  
 (PRIN) 印刷/出版 Printing/Publishing  
 (PROF) 律師/會計師/建築師/測量師 Lawyer/ Accountant/ Architect/Surveyor  
 (REAL) 房地產 Real Estate  
 (REST) 餐廳/餐飲/酒店 Restaurant/Catering/Hotel  
 (RETL) 批發/零售 Wholesale/Retail  
 (SCHL) 學校/幼稚園/教育 School/Kindergarten/Education  
 (SECU) 保安服務/物業管理 Security Service/Property Management  
 (SOCI) 社區/社會服務 Community/Social Service  
 (TEXT) 紡織/成衣 Textile/Garment  
 (TMTT) 通訊/傳媒/科技 Telecommunication/Media/Technology  
 (TRAD) 入口/出口/貿易 Import, Export/Trading  
 (TRAN) 交通/儲存倉 Transport/Storage  
 (TRAV) 旅遊 Travel  
 (OTHE) 其他，請註明 Others, please specify

**進階登入服務詳情****Advanced Mode Login Service Details**進階登入功能 Advanced Mode Login Functions

1. 查詢供款紀錄 Contribution History Enquiry
2. 查詢成員資料 Member Details Enquiry
3. 查詢基金資料 Fund Information Enquiry
4. 僱主為成員供款總額 Employer Total Contribution for Member
5. e-通知 e-Alerts
6. 遞交 e-付款結算書 Submit e-Remittance Statement

**申請文件清單****Checklist of Application Documents**

如未能提供全部所需文件，可能會影響開立此強積金帳戶。MPF account setup may be affected if you do not submit all required documents.

1. 已簽署之僱主申請表格 Signed Employer Application Form
2. 授權簽署人名單正本(如適用) Original Authorised Signatory List with Specimen Signature(s)(if applicable)
3. 授權簽署人香港身份證/護照核證副本 Certified true copy of HKID Card/Passport of Authorised Signatory(ies)
4. 法人團體所有董事名單及其中兩位董事的香港身份證/護照之核證副本 List of All Directors of the Corporation and the certified true copies of HKID Card/Passport for any two of them
5. 合夥的所有合夥人的姓名名單或非法人團體所有成員的姓名名單，以及合夥或非法人團體的實益擁有人及擔任職位的人的姓名名單(如適用) List of All Partners of the Partnership or All Members of the Unincorporated Body and the Beneficial Owners or Office Bearers of the Partnership of the Unincorporated Body(if applicable)
6. 就簽署人代表該公司行事提供授權書或董事會會議紀錄(如適用) Authorisation Letter or Board Resolution (if applicable)
7. 公司註冊證核證副本(如適用) Certified true copy of Certificate of Incorporation (if applicable)
8. 所有公司更改名稱證明書核證副本(如適用) Certified true copies of all Certificate of Change of Name (if applicable)
9. 商業登記證核證副本(如適用) Certified true copy of Business Registration Certificate(if applicable)
10. 章程大綱及細則(如適用) Memorandum and Articles of Association(if applicable)
11. 擁有權架構表(如適用) Ownership Chart (if applicable)
12. 自我證明表格 – 控權人(如適用) Self-Certification Form – Controlling Person (if applicable)
13. 董事或授權簽署人之改名契核證副本(如適用) Certified true copy of Director(s)'s / Authorized signer(s)'s deed poll of name change (if applicable)

公司專用 For Official Use Only	Input by :		Date :		Verified by :		Date :	
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