

填寫本表格前,請先閱讀下列重要資料:

註I

提交申索前須注意的事項

- 就依據《條例》第 11 條支付的自願性供款所產生的權益而言,提取權益須受有關註冊計劃的管限規則所規限。詳情請查閱有關計劃的要約文件,而要約文件可於中銀國際英國保誠信託有限公司(中銀保誠)的網站閱覽。詳情請向中銀保誠查詢(熱線: 2929 3366或電郵地址: mpf@bocpt.com)。
- 就依據《條例》第 11 A 條存入的可扣稅自願性供款所產生的權益而言,提取權益須受與強制性供款相同的提取規定所規限(惟根據第 11 A (3)條,若干與抵銷遣散費或長期服務金有關,以及與保障債權人及其他人士的權益有關的條文並不適用)。

選擇提取方式前須考慮的因素

若基於已達到65歲退休年齡或提早退休的理由而申索權益,可以選擇整筆提取或分期提取。在選擇提取權益的金額及時間時,除了其他因素之外,請細心考慮你的個人需要、風險承受能力及財政狀況,然後才作決定。中銀保誠可就每次提取向計劃成員收取必需交易費用;如計劃成員在一個公曆年內從同一個強積金帳戶分期提取權益超過12次(或該計劃准予免費分期提取次數),中銀保誠會就額外每次分期提取向該計劃成員收取港幣100元之手續費用。詳情請向中銀保誠查詢。

查詢

- 如欲查詢帳戶詳情及個別計劃或基金的資料,請聯絡中銀保誠。
- 有關申索權益的一般查詢,請聯絡中銀保誠或強制性公積金計劃管理局(管理局)(熱線電話: 2918 0102; 電郵地址: mpfa@mpfa.org.hk)。

註II

- (1) 要求支付權益的申索,可由計劃成員或根據《精神健康條例》(第136章)獲委任代表精神上無行為能力的計劃成員行事的產業受託監管人(產業受託監管人)作為申索人提出。如法庭委任超過一人為產業受託監管人,該等人士應按照委任條款及有關法庭命令所載的任何其他規定,以產業受託監管人的身分提出申請及在相關文件簽署。請就第I部另紙詳載各申索人的資料。在此情況下,除非法庭另有授權,否則本表格須由所有獲法庭委任為該計劃成員的產業受託監管人的人士簽署。
- (2) 如申索人/計劃成員沒有香港身分證,請填上護照上的姓名。
- (3) 計劃成員帳戶號碼可循以下途徑查閱/查詢:
  - (i) 查閱成員證明書、接納通知或參與通知;或
  - (ii) 查閱周年權益報表或受託人提供的其他報表;或
  - (iii) 受託人為成員提供的諮詢服務。如有疑問,請聯絡中銀保誠(熱線: 2929 3366或電郵地址: mpf@bocpt.com)。
- (4) 如有需要,中銀保誠在處理付款申索時可能會要求申索人提交文件的正本,以核對資料。
- (5) 由產業受託監管人代表計劃成員提出的申索,除須提供有關該計劃成員的所需文件外,亦應夾附以下文件:
  - (i) 產業受託監管人身分的證明文件副本,即法庭命令的副本;
  - (ii) 每名申索人的香港身分證副本,以供核對其姓名及身分證號碼(如不擬親身出示申索人的香港身分證供核對有關資料)<sup>註III(6)</sup>;及
  - (iii) 產業受託監管人就申索權益所作的法定聲明表格(第MPF(S)-W(SD4)號表格)<sup>註II(7)</sup>正本(如適用)。如使用該表格作出聲明並把該表格夾附於本申索,便無須提交基於提早退休的理由作出申索的法定聲明表格(即第MPF(S)-W(SD1)號表格)。
- (6) 如申索人/計劃成員沒有香港身分證,而又不擬親身出示護照以供核對資料,則須提供護照副本(只須提供載有個人資料及護照號碼之頁),以供有關受託人核對申索人/計劃成員的姓名及護照號碼。
- (7) 法定聲明必須是一份屬該聲明宣誓所在地有效的法定聲明(例如在香港,法定聲明須在監誓員(例如在民政事務總署諮詢服務中心)或公證人或太平紳士面前作出,並由他們簽署)。在香港以外地方所作的法定聲明,只要是在公證人或獲該地法律授權監誓或監理法定聲明的人士面前作出,並由他們簽署,亦可予接受。
- (8) 如計劃成員的香港身分證並未印有出生月份及/或日子,則可採用以下其中一種方法,就其出生月份及/或日子提供證據:
  - (i) 採用某份官方文件(例如旅遊證件或有關計劃成員的出生日期的法定聲明)所載的出生日期;或
  - (ii) 採用計劃成員香港身分證上的簽發日期的日子及月份。如計劃成員沒有採用以上任何一種方法就其出生月份及日子提供證據,則受託人在沒有上述證據的情況下,會以下述日子作為該計劃成員的出生日期:
  - (i) 計劃成員的香港身分證所載的出生月份的最後一日(如該香港身分證只載有出生年份及月份,而沒有出生日子),作為其出生日期;或
  - (ii) 計劃成員的香港身分證所載的出生年份的最後一日(如該香港身分證只載有出生年份,而沒有出生月份及日子),作為其出生日期。請注意,就計劃成員作出的強制性供款(如有),將根據計劃成員提供的證據,或按上述預設的出生日期計算,於計劃成員年滿65歲當日終止。
- (9) 如申索人擬就同一個註冊計劃內的不同帳戶選擇不同的提取金額,須就每個帳戶分別填寫一份表格。
- (10) 受託人不得就向計劃成員整筆支付或每公曆年首12次(或計劃准予免費分期提取的次數)向計劃成員分期支付權益,而向該計劃成員收取費用或施加罰款,或從該計劃成員的帳戶扣除費用或罰款,但為執行該項權益提取而進行買賣投資所招致,或是合理地相當可能招致,並須向某方(該受託人除外)支付的必需交易費用除外。如向計劃成員分期提取的次數多於每公曆年12次(或計劃准予免費分期提取的次數),受託人可向計劃成員就額外每次分期提取收取港幣100元之手續費用。有關支付權益的安排及所涉及的費用,請向中銀保誠查詢。
- (11) 此提取方式適用於從第II(1)部指明的每個計劃成員帳戶內提取整筆權益(如計劃成員根據有關計劃的管限規則有權提取由自願性供款所產生的權益,則包括該等權益,另外亦包括由可扣稅自願性供款所產生的權益)。詳情請向中銀保誠查詢。
- (12) 此提取方式適用於從第II(1)部指明的每個計劃成員帳戶內分期提取權益(如計劃成員根據有關計劃的管限規則有權提取由自願性供款所產生的權益,則包括該等權益,另外亦包括由可扣稅自願性供款所產生的權益)。就每個計劃成員帳戶,受託人會根據贖回權益當日的資金分配,按比例從每個分帳戶(如有)中贖回註明的提取金額(如計劃成員根據有關計劃的管限規則有權提取由自願性供款所產生的權益,則包括該等權益)。如帳戶結餘少於申索人註明的提取金額,則帳戶內的結餘將會被全數提取。如申索人其後擬提取帳戶內餘下的權益,請向中銀保誠另行提出申索。此外,如中銀保誠向申索人以分期方式支付權益後收到僱主補回的欠交供款或供款附加費,中銀保誠將會在切實可行範圍內盡快安排退款給申索人而毋須另行通知。

請注意

- 若從保證基金提取權益,可能導致計劃成員不符合部分或所有保證條件,以致影響其享有保證的資格。詳情請查閱計劃的要約文件或向有關的受託人查詢。
- 基金單位價格會因市場波動而出現變化,單位價格可跌亦可升。你向受託人提交申索表格當日的基金單位價格,或會與贖回基金單位當日的價格有所不同。
- 如現時你的權益是按照計劃的預設投資策略投資,請留意預設投資策略的降低投資風險機制,會由計劃成員年滿 50 歲開始運作。如計劃的受託人在預設投資策略下按年降低你的投資風險的時間,與接獲你的申索權益申請的時間相當接近,該計劃的受託人將根據其運作程序及在符合《條例》規定的情況下,訂定處理降低風險及申索權益的次序。如欲瞭解計劃受託人如何處理該等交易,請向受託人查詢詳情。
- 如權益並非整筆提取,計劃成員帳戶內餘下的權益將繼續進行投資。投資涉及風險,基金單位價格可跌亦可升。過往表現並非未來表現的指標。此外,若餘下的權益繼續投資保證基金,其享有的保證或不再適用。詳情請向有關的受託人查詢。請詳細考慮你的投資目標、財政狀況、風險承受能力及有關的計劃及成分基金的主要特點(例如風險種類及水平,及收費種類及水平)。如欲瞭解詳情,可於管理局的網站(www.mpfa.org.hk)參閱管理局印製的資訊刊物。

**MANDATORY PROVIDENT FUND SCHEMES ORDINANCE (CAP 485)(the Ordinance)**  
**Explanatory Notes on Claim Form For Payment of MPF Accrued Benefits (Benefits) on Grounds of**  
**Attaining the Retirement Age of 65 or Early Retirement (Form MPF(S)-W(R))**

Please read the following **important notes** before completing this Form.

**Note I**

**Reminder Before Submitting a Claim**

- Withdrawal of benefits derived from voluntary contributions paid pursuant to section 11 of the Ordinance is subject to the governing rules of the scheme concerned. Please check the information from the offering document of the scheme concerned, which can be found on the website of BOCI-Prudential Trustee Limited (BOCIPT). Please consult BOCIPT for details (hotline: 2929 3366 or email: mpf@bocpt.com).
- Withdrawal of benefits derived from tax deductible voluntary contributions paid pursuant to section 11A of the Ordinance is subject to the same withdrawal requirements as for mandatory contributions (except that under section 11A(3), certain provisions relating to offsetting of severance or long service payments, and protection of benefits from creditors and others, do not apply).

**Factors to Consider before Selecting Withdrawal Option**

Benefits may be withdrawn on the grounds of attaining the retirement age of 65 or early retirement either in a lump sum or by instalments. Before making any decision as regards the amount and timing of withdrawal of benefits, please consider, among other things, your personal needs, risk tolerance level and financial circumstances carefully. The scheme member may be charged the necessary transaction costs for each withdrawal, and a handling fee of HK\$100 per each additional partial withdrawal will be charged to the scheme member if more than 12 withdrawals by instalments (or the number of free withdrawal by instalments offered by the scheme) from the same MPF account are made in a calendar year. Please consult BOCIPT for details.

**Enquiries**

- Please contact BOCIPT for enquiries about account details and information on specific schemes or funds.
- For general enquiries regarding a claim for payment of benefits, please contact BOCIPT or the Mandatory Provident Fund Schemes Authority (the Authority) (hotline: 2918 0102 or email: mpfa@mpfa.org.hk).

**Note II**

- (1) Either the scheme member or person(s) appointed as a committee of the estate of a mentally incapacitated person under the Mental Health Ordinance (Cap. 136) ("the committee of the estate") to act on behalf of the scheme member can be the claimant to lodge the claim for payment of benefits. If there is more than one person appointed by the court as the committee of the estate, those persons should apply and sign in the capacity as the committee of the estate in accordance with those terms of appointment and any other requirements contained in the relevant court order. Please use an additional blank sheet to provide details of the claimants under Section I. Under such circumstances, this Form needs to be signed by all of the persons appointed by the court as the committee of the estate, unless the Court authorizes otherwise.
- (2) If a claimant/scheme member does **NOT** possess a HKID Card, please fill in the name as shown on the passport.
- (3) Scheme member account number can be found:
  - (i) in the membership certificate, notice of acceptance, or notice of participation; or
  - (ii) in the annual benefit statement, or other statements provided by the trustee; or
  - (iii) through the member enquiry facilities available from the trustee.If you are in doubt, please contact BOCIPT (hotline: 2929 3366 or email: mpf@bocpt.com).
- (4) In processing a claim for payment, BOCIPT may request the claimant to produce the original documents for checking purpose, if necessary.
- (5) For a claim made by the committee of the estate on behalf of the scheme member, in addition to the required documents in respect of the scheme member, the following documents should be enclosed:
  - (i) a copy of the evidence of the status of the committee of the estate, i.e. the court order;
  - (ii) a copy of each claimant's HKID card for verification of the name and identity card number of the claimant if the claimant does not wish to present the card in person for verification <sup>Note II (6)</sup>; and
  - (iii) the original statutory declaration form made by the committee of the estate for a claim for payment of benefits (Form MPF(S)-W(SD4))<sup>Note II (7)</sup> (if applicable). Where such a statutory declaration has been made and enclosed with the claim, the statutory declaration form (MPF(S)-W(SD1)) for a claim made on the grounds of early retirement shall not be required.
- (6) For a claimant/scheme member who does **NOT** possess a HKID card, a copy of the passport (only pages with personal particulars and passport number) should be provided to the trustee concerned for verification of the name and passport number of the claimant/scheme member if the claimant/scheme member does not wish to present the passport in person for verification.
- (7) The statutory declaration must be a valid statutory declaration in the place where the declaration is made (e.g. in Hong Kong, the statutory declaration should be made before and signed by a Commissioner for Oaths (e.g. at a Public Enquiry Service Centre of the Home Affairs Department) or a Notary Public or a Justice of the Peace). A statutory declaration made in a place other than Hong Kong is also acceptable provided that it is made before and signed by a Notary Public or a person authorized under the law of that place to administer an oath or take a statutory declaration.
- (8) A scheme member who does not have the month and/or day of birth printed on the HKID card may provide evidence as to the month and/or day by using one of the following methods:
  - (i) using the birth date as shown on an official document (e.g. a travel document or a statutory declaration of the scheme member's date of birth); or
  - (ii) using the day and month of the issue date of the HKID card of the scheme member.If the scheme member has not used any of the methods above to provide evidence as to the month and day, then in the absence of the above evidence, the trustee will:
  - (i) where the HKID card shows only the year and month of birth (and not the day of birth), use the last day of the month as shown on the HKID card as the birth date of the scheme member; and
  - (ii) where the HKID card shows only the year of birth (and neither the month nor day of birth), use the last day of the year as shown on the HKID card as the birth date of the scheme member.Please note that mandatory contributions in respect of the scheme member (if any) will cease on the day when the scheme member reaches age 65 based on the evidence provided by the scheme member or defaulted above.
- (9) If a claimant wishes to select different withdrawal amounts for different accounts within a scheme, the claimant should fill in a separate form for each account.
- (10) No fees or financial penalties may be charged to or imposed on a scheme member or deducted from the scheme member account, other than necessary transaction costs incurred or reasonably likely to be incurred in selling or buying investments in order to give effect to the withdrawal and are payable to a party other than the trustee, for payment of the member's benefits in a lump sum or for the first 12 withdrawals by instalments (or the number of free withdrawals by instalments offered by the scheme) each calendar year. Payments in excess of 12 times (or the number of free withdrawals by instalments offered by the scheme) in a calendar year will be subject to a handling fee of HK\$100 per each additional partial withdrawal. Please consult BOCIPT on the arrangement and fees involved.
- (11) This option is applicable for withdrawing the benefits in a **LUMP SUM** from each scheme member account specified in Section II(1) (including benefits derived from voluntary contributions if the scheme member is entitled to withdraw them based on the governing rules of the scheme concerned and benefits derived from tax deductible voluntary contributions). Please consult BOCIPT for details.
- (12) This option is applicable for withdrawing the benefits by **INSTALMENTS** from each scheme member account specified in Section II(1) (including benefits derived from voluntary contributions if the scheme member is entitled to withdraw them based on the governing rules of the scheme concerned and benefits derived from tax deductible voluntary contributions). For each scheme member account, the specified withdrawal amount will be redeemed proportionally from each sub-account (if any) according to the fund allocation as of the day on which the trustee redeems the benefits (including benefits derived from voluntary contributions if the scheme member is entitled to withdraw them based on the governing rules of the scheme concerned). If the account balance is less than the withdrawal amount specified by the claimant, the entire account balance will be withdrawn. If the claimant subsequently wishes to withdraw the remaining benefits in the accounts, please submit another claim to BOCIPT. If BOCIPT receives an outstanding contribution or contribution surcharge for the benefit of the claimant after benefits are paid by instalment, BOCIPT will arrange payment of the contribution or surcharge to the claimant as soon as practicable after receiving it without prior notice.

**Reminder**

- Withdrawal of benefits out of a guaranteed fund may result in some or all of the guarantee conditions not being satisfied; thus affecting your entitlement to the guarantee. Please check the offering document of the scheme or consult the relevant trustee for details.
- The price of fund units may change due to market fluctuations and may go down as well as up. The price of fund units on the date when you submit a claim form to the trustee may be different from that on the date when the fund units are redeemed.
- If your benefits are currently invested according to the default investment strategy (DIS) of the scheme, you should be aware that the de-risking mechanism of the DIS starts at the age of 50. If the annual de-risking of your investments in the DIS and your claim for payment of benefits take place at around the same time, the trustee of the scheme shall sequence the de-risking and the claim in accordance with its procedures and in compliance with the Ordinance. Please consult the trustee of the scheme if you wish to know the details of how it will handle these transactions
- If benefits are not withdrawn in full, the remaining benefits will continue to be invested. Investment involves risk and the price of fund units may go down as well as up. Past performance does not indicate future performance. In addition, where any benefits continue to be invested in a guaranteed fund, the guarantee may cease to apply to any such benefits. Please consult the relevant trustee for details. You should carefully consider factors such as your investment objectives, financial situation, risk tolerance level and key features (e.g. types and levels of risks, types and levels of fees and charges) of the scheme(s) and the constituent fund(s) concerned. Please refer to the Authority's publications available on the Authority's website (www.mpfa.org.hk).

# 我的 MY CHOICE 強積金計劃

MANDATORY PROVIDENT FUND SCHEME

## 基於已達到 65 歲退休年齡或提早退休的理由而申索強積金累算權益(權益)的表格 Claim Form For Payment of MPF Accrued Benefits (Benefits) on Grounds of Attaining the Retirement Age of 65 or Early Retirement

MY CLAIM FORM  
(MPF(S)-W(R))

### 注意 Notes:

- 本表格僅供擬基於已達到65歲退休年齡或提早退休的理由提出申索，要求從一個強積金註冊計劃(計劃)提取權益的人士填報。若基於提早退休的理由提出申索，計劃成員必須達到60歲，並已永久性地終止所有受僱及自僱工作，且無意再次受僱或自僱。若基於其他理由申索權益，請填寫第MPF(S)-W(O)號表格。  
This Form is to be completed by any person who wishes to claim for payment of benefits from an MPF registered scheme (scheme) on the grounds of attaining the retirement age of 65 or early retirement only. For a claim made on the grounds of early retirement, the scheme member must reach the age of 60 and have permanently ceased all employment and self-employment with no intention of becoming employed or self-employed again. For a claim for payment of benefits on other grounds, please use Form MPF(S) - W(O).
- 如申索人/計劃成員擬從多於一個計劃提取權益，須就每個計劃填寫一份表格。  
If the claimant/scheme member wishes to withdraw benefits from more than one scheme, please fill in a separate form for each scheme.
- 請把填妥的表格及所需證明文件交予中銀保誠，以便處理有關申索。若提供的任何資料不正確或不完整，中銀保誠可能無法處理你的申請。  
Please submit the completed form and the required supporting documents to BOCIPT for processing the claim. If any information provided is incorrect or incomplete, BOCIPT may not be able to process your request.
- 填報本表格前，請先細讀填報須知。  
Please read the explanatory notes carefully before completing this Form.
- 就此項申索權益申請提供的個人資料，將用作處理你的申索。你提供的個人資料可能會為該目的而轉交相關服務提供者及政府或規管機構，包括強制性公積金計劃管理局(管理局)。  
The personal data to be supplied in support of this claim for payment of benefits are to be used for processing your claim. The personal data you supply may, for such purpose, be transferred to the relevant service provider(s) and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority (the Authority).
- \*請刪去不適用者。  
\* means delete whichever is not applicable.

### (I) 申索人<sup>註 II (1)</sup>/計劃成員資料 DETAILS OF THE CLAIMANT <sup>Note II (1)</sup>/SCHEME MEMBER

1) 申索人資料 Claimant Details		
姓名 <sup>註 II (2)</sup> (與香港身分證上的姓名相同) 中文 先生/女士*	Name <sup>Note II (2)</sup> (as shown on Hong Kong Identity (HKID) Card) English *Mr / Ms	香港身分證/護照*號碼 (僅供沒有香港身分證的人士填寫) HKID Card / Passport* No. ( <u>ONLY</u> for person without HKID Card)
通訊地址 Correspondence Address		
日間聯絡電話 Daytime Phone	手提電話 Mobile Phone	電郵地址 Email Address
2) 計劃成員資料 (如與申索人不同) Scheme Member Details (if different from the claimant)		
姓名 <sup>註 II (2)</sup> (與香港身分證上的姓名相同) 中文 先生/女士*	Name <sup>Note II (2)</sup> (as shown on Hong Kong Identity (HKID) Card) English *Mr / Ms	香港身分證/護照* (僅供沒有香港身分證的計劃成員填寫) 號碼 HKID Card / Passport* No. ( <u>ONLY</u> for scheme member without HKID Card)

### (II) 申索資料 DETAILS OF THE CLAIM

(1) 帳戶資料 (請在適當的方格內填上✓號) ACCOUNT INFORMATION (please ✓ the appropriate box)	
計劃名稱 Name of the scheme	我的強積金計劃 My Choice Mandatory Provident Fund Scheme
<input type="checkbox"/> 計劃內所有帳戶 All accounts under the Scheme	
<input type="checkbox"/> 計劃內的指明帳戶 (請註明計劃成員帳戶號碼 <sup>註 II (3)</sup> ) Selected account(s) under the Scheme (please specify the scheme member account no. <sup>Note II (3)</sup> )	(1) _____ (2) _____ (3) _____

(2) 申索權益的理由及所需文件<sup>註II(4)及註II(5)</sup> (請在適當的方格內填上✓號)

GROUND FOR CLAIMING BENEFITS AND THE REQUIRED DOCUMENTS<sup>Notes II(4 & 5)</sup> (please ✓ the appropriate box)

- 本人之前曾基於下述理由從第 II(1)部指明的所有帳戶分期提取權益，因此無須就是次申索再次提供所需文件。  
I have previously withdrawn the benefits by instalments on the below grounds from all the accounts specified in Section II(1), therefore, I **DO NOT** provide the required documents for this claim again.
- 已達到 65 歲退休年齡 Attaining the retirement age of 65
- 計劃成員的香港身分證副本，以供核對其姓名、出生日期及身分證號碼（如不擬親身出示計劃成員的香港身分證供核對有關資料）<sup>註II(6)</sup>  
a copy of the scheme member's HKID card for verification of the name, date of birth and identity card number of the scheme member if the claimant does not wish to present the card in person for verification<sup>Note II(6)</sup>
- 提早退休 Early Retirement
- 計劃成員的香港身分證副本，以供核對其姓名、出生日期及身分證號碼（如不擬親身出示計劃成員的香港身分證供核對有關資料）<sup>註II(6)</sup>；及  
a copy of the scheme member's HKID card for verification of the name, date of birth and identity card number of the scheme member if the claimant does not wish to present the card in person for verification<sup>Note II(6)</sup>; and
- 有關提早退休的法定聲明表格（第 MPF(S)-W(SD1)號表格）<sup>註II(7)</sup>正本  
the original statutory declaration form on early retirement (Form MPF(S) - W(SD1))<sup>Note II(7)</sup>

如計劃成員的香港身分證並未載有出生月份及／或日子，請提供載有該計劃成員出生日期的證明<sup>註II(8)</sup>：

For a scheme member whose HKID card does not contain the month and/or day of birth, evidence showing the scheme member's date of birth<sup>Note II(8)</sup>:

- 載有計劃成員出生月份及／或日子的護照或其他旅遊證件的副本；或  
a copy of the scheme member's passport or other travel document showing the month and/or day of birth; or
- 在計劃成員的香港身分證副本上圈出（或以其他方式顯示）該身分證的簽發日期的月份及日子，以表示計劃成員擬採用其香港身分證的簽發日期的月份及日子作為其出生月份及日子；或  
a copy of the scheme member's HKID card with the day and month of the issue date of the HKID card circled or by other means to indicate that the scheme member wishes to use the day and month of the issue date of the HKID card as the day and month of birth; or
- 有關計劃成員出生日期的法定聲明<sup>註II(7)</sup>正本  
the original statutory declaration of the scheme member's date of birth<sup>Note II(7)</sup>

(3) 擬從第 II(1)部指明的每個帳戶提取的權益金額<sup>註II(9)及註II(10)</sup> (請在適當的方格內填上✓號)

AMOUNT OF BENEFITS TO BE WITHDRAWN FROM EACH ACCOUNT SPECIFIED IN SECTION II(1)<sup>Notes II(9 & 10)</sup> (please ✓ the appropriate box)

整筆<sup>註II(11)</sup> A lump sum<sup>Note II(11)</sup>

或 OR

註明提取金額<sup>註II(12)</sup> Specify withdrawal amount<sup>Note II(12)</sup>

港元 HK\$ \_\_\_\_\_

(請向中銀保誠查詢最低提取金額的規定 please check with BOCIPT for the requirements on minimum withdrawal amount)

(4) 付款方式 Method of payment  只限支票 by cheque only

(III) 授權及聲明 AUTHORIZATION & DECLARATION

(1) 終止沒有剩餘款項的強積金帳戶（如適用）

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

本人／我們<sup>註II(1)</sup>謹此授權受託人在以下情況終止在第II(1)部所述的計劃成員帳戶：

- (i) 該帳戶內的權益已被全數提取，並無剩餘款項；
- (ii) （只適用於僱員供款帳戶）該供款帳戶所涉及的受僱或自僱已經終止；及
- (iii) （只適用於自僱人士供款帳戶）終止自僱，生效日期為\_\_\_\_\_（日／月／年）。

I / We<sup>Note II(1)</sup> hereby authorize the trustee to terminate the relevant MPF scheme member account(s) as referred to in Section II(1) upon

- (i) withdrawal of the full amount of benefits with no residual balance in the said account(s),
- (ii) (for employee contribution account only) termination of the employment in relation to the contribution account; and
- (iii) (for self-employed person contribution account only) cessation of the self-employment, with effect from \_\_\_\_\_ (DD/MM/YYYY).

(2) 聲明 DECLARATION

本人／我們<sup>註II(1)</sup>聲明，盡本人／我們\* 所知所信，本表格及隨附文件所提供的資料均屬正確無訛且並無缺漏。◆

I / We<sup>Note II(1)</sup> declare that to the best of my / our\* knowledge and belief, the information given in this Form and its attachments is correct and complete.◆

申索人簽署 Signature of the claimant(s)

日期 (日/月/年) Date (DD/MM/YYYY)

◆注意：根據《條例》第 43E 條，任何人在給予管理局或核准受託人的任何文件中，明知或罔顧後果地作出在要項上屬虛假或具誤導性的陳述，即屬犯罪。首次定罪者，最高可處罰款\$100,000 及監禁一年；其後每次定罪，最高可處罰款\$200,000 及監禁兩年。根據《刑事罪行條例》（第 200 章）第 36 條，任何人明知而故意在法定聲明中作出在要項上屬虛假的陳述，亦屬犯罪。一經定罪，可處監禁兩年及罰款。

◆Warning: Under section 43E of the Ordinance, a person who, in any document given to the Authority or an approved trustee, knowingly or recklessly makes a statement which is false or misleading in a material respect commits an offence and is liable to a maximum penalty of a \$100,000 fine and 1 year's imprisonment on the first conviction and a \$200,000 fine and 2 years' imprisonment on each subsequent conviction. A person who knowingly and willfully makes a statutory declaration false in a material particular also commits an offence under section 36 of the Crimes Ordinance (Cap. 200) and is liable on conviction to imprisonment for 2 years and to a fine.

第 MPF(S) - W(SD1) 號表格
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《強制性公積金計劃條例》（第 485 章）  
（《條例》）

基於提早退休的理由而  
申索強積金累算權益的法定聲明

本人， \_\_\_\_\_ [申索人姓名]，  
香港身分證／護照\*\*號碼： \_\_\_\_\_，  
地址為 \_\_\_\_\_ [申索人地址]，  
謹以至誠鄭重聲明：

- (a) 本人已於 \_\_\_\_\_ [年／月／日] 年滿 60 歲；及
- (b) 本人已永久性地終止所有受僱，並且無意再次受僱或自僱，及本人已終止所有自僱，並且無意再次自僱或受僱。

本人謹憑藉《宣誓及聲明條例》（第 11 章）衷誠作出此項鄭重聲明，並確信其為真確無訛。

\_\_\_\_\_  
[申索人簽署]

此項聲明於 \_\_\_\_\_ 年 \_\_\_\_\_ 月 \_\_\_\_\_ 日在香港 \_\_\_\_\_  
及在本人面前作出。

監理法定聲明人士簽署及公司蓋章（如適用）： \_\_\_\_\_

姓名： \_\_\_\_\_

職銜： \_\_\_\_\_

\* 刪去不適用者

# 申索人應只在沒有香港身分證的情況下才填報護照號碼

✦ **注意：** 根據《條例》第 43E 條，任何人在給予強制性公積金計劃管理局或核准受託人的任何文件中，明知或罔顧後果地作出在要項上屬虛假或具誤導性的陳述，即屬犯罪。首次定罪者，最高可處罰款 \$100,000 及監禁一年；其後每次定罪，最高可處罰款 \$200,000 及監禁兩年。根據《刑事罪行條例》（第 200 章）第 36 條，任何人明知而故意在法定聲明中作出在要項上屬虛假的陳述，亦屬犯罪。一經定罪，可處監禁兩年及罰款。