

致： 中銀國際英國保誠信託有限公司  
香港太古城皇道 1111 號  
15 樓 1507 室

To: BOCI-Prudential Trustee Limited  
Suite 1507, 15/F, 1111 King's Road,  
Taikoo Shing, Hong Kong

FORM SM-CHG(PART)

中銀保誠簡易強積金計劃  
BOC-PRUDENTIAL EASY-CHOICE MANDATORY PROVIDENT FUND SCHEME

注意 Note:

- 請以英文正楷填寫。Please complete in BLOCK LETTERS.
- \*請刪除不適用者。\*Please delete whichever is inappropriate.
- 請於適當位置加上「✓」號。Please ✓ the appropriate box.
- 如賬戶持有人的稅務居住地有任何改變，閣下必須在改變後的 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。An account holder must notify the Trustee and provide an updated Self-Certification form within 30 days if there is any change in circumstances relating to your status of tax residency(ies).

Sample 樣本

甲部 成員資料及更改資料生效日期		PART A MEMBER'S DETAILS & EFFECTIVE DATE OF CHANGES	
成員姓名 Member Name	英文姓氏 English Surname <b>Chan</b>	英文名字 English Given Name <b>Tai Man</b>	中文 Chinese <b>陳大文</b>
			*香港身份證/護照號碼 *HKID Card/Passport No. <b>Y111111(2)</b>
計劃編號 Scheme No.	<b>00123456789</b>	生效日期 Effective Date of Changes	<div> <div>0</div> <div>1</div> <div>0</div> <div>1</div> <div>1</div> <div>9</div> <div>9</div> <div>0</div> </div> <div> <div>日 DD</div> <div>月 MM</div> <div>年 YYYY</div> </div>
成員類別 Type of member	<input type="checkbox"/> 僱員成員 Employee Member <input type="checkbox"/> 額外自願性供款成員 Special Voluntary Contribution Member <input type="checkbox"/> 自僱成員 SEP Member <input checked="" type="checkbox"/> <b>請選擇</b> <input type="checkbox"/> 個人賬戶成員 Personal Account Member <input type="checkbox"/> 可扣稅自願性供款成員 Tax Deductible Voluntary Contribution Member		
僱主名稱 (如適用) Name of Employer (If applicable)	<b>ABC Company Limited</b>		

乙部 更改個人資料		PART B CHANGE OF PERSONAL PARTICULARS	
<input type="checkbox"/> 成員姓名# Member Name#	英文姓氏 English Surname	英文名字 English Given Name	中文 Chinese
<b>請選擇需要更改之項目 (可選多項)</b>			
<input type="checkbox"/> *香港身份證/護照號碼# * HKID Card/Passport No. #	<input type="checkbox"/> 出生日期 # Date of Birth #		<div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div> <div>日 DD</div> <div>月 MM</div> <div>年 YYYY</div> </div>
請注意，如閣下現正投資於預設投資策略，更改出生日期可能令閣下的預設投資策略組合受到影響。Please note that changing the date of birth may have an impact on your Default Investment Strategy (DIS) portfolio if you are investing in the DIS.			
<input type="checkbox"/> 國籍(國家/地區) Nationality (Country/ Region)	<input type="checkbox"/> 新增 Add <div> <div>1</div> <div>2</div> </div> <input type="checkbox"/> 更改 Change <div> <div>由</div> <div>更改至</div> </div> <div> <div>Change from</div> <div>to</div> </div>		

以下資料更改只適用於自僱人士 The following changes will only make applicable to SEP member.

<input type="checkbox"/> 傳真號碼(只適用於自僱成員) Fax No. (Only applicable to SEP Member)	
<input type="checkbox"/> 供款方式(只適用於自僱成員) Contribution Frequency (Only applicable to SEP Member)	<input type="checkbox"/> 年供 Yearly <input type="checkbox"/> 月供 Monthly
<input type="checkbox"/> 付款方法(只適用於自僱成員) Payment Method (Only applicable to SEP Member)	<input type="checkbox"/> 自動轉賬 (請遞交「直接付款授權書」) Autopay (Please submit "Direct Debit Authorization Form") <input type="checkbox"/> 支票 (請遞交「取消直接付款通知書」) Cheque (Please submit "Direct Debit Request Cancellation Advice")

\*若更改姓名、香港身份證 / 護照號碼或出生日期，須提供有關法定證明文件。如成員只提供出生年份及月份，受託人將以出生月份的最後一天作為成員的出生日期；如成員只提供出生年份，受託人將以出生年份的最後一天作為成員的出生日期。護照號碼僅供沒有香港身份證的成員填寫。

\*Must provide copy of statutory document(s) for proofing any changes of name, HKID card/Passport No. or date of birth. If member only provides the year and month of birth, the trustee will use the last day of the month as the birthday of the member, and where if the member only provides the year of birth, the trustee will use the last day of the year as the birthday of the scheme member. Passport No. ONLY applicable to member without HKID Card.

以下所有聯絡資料，將自動適用於計劃成員以香港身份證／護照號碼登記於中銀保誠簡易強積金計劃(本計劃)的所有賬戶。

All the below contact information will automatically apply to **ALL** your accounts maintained under the HKID/Passport number registered under BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme (the "Scheme").

<input checked="" type="checkbox"/> 現時住宅地址 Current Residential Address (恕不接受郵政信箱 P.O. Box will not be accepted)	室 Flat/Room <b>001</b>	樓 Floor <b>1</b>	座 Block <b>1</b>	大廈名稱/屋邨名稱 Name of building/Name of Estate <b>Happy Building</b>	
	門牌號碼 Street no. <b>1</b>		街道名稱 Name of street <b>Happy Street</b>		
	地區名稱 Name of district <b>Central</b>		<input checked="" type="checkbox"/> 香港 HK <input type="checkbox"/> 九龍 KLN <input type="checkbox"/> 新界 NT	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	
			<input checked="" type="checkbox"/> 請填寫，如適用		
請指示上述改變將適用於 Please indicate the above change will be applied to: <input type="checkbox"/> 現時住宅地址 Current Residential Address <input type="checkbox"/> 通訊地址 Correspondence Address <input checked="" type="checkbox"/> 上述兩者皆是 Both of the above					
<input type="checkbox"/> 通訊地址(如與住宅地址不同) Correspondence Address (If different from Residential Address)	室 Flat/Room	樓 Floor	座 Block	大廈名稱/屋邨名稱 Name of building/Name of Estate	
	門牌號碼 Street no.		街道名稱 Name of street		
	地區名稱 Name of district		<input type="checkbox"/> 香港 HK <input type="checkbox"/> 九龍 KLN <input type="checkbox"/> 新界 NT	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	
請提供至少一個本地手提電話號碼及電郵地址，以便日後收取本公司電子服務驗證碼及方便聯絡閣下。 Please provide at least one local mobile phone no. and email address to receive the verification code for using our electronic services and remain in contact with us.					
<input checked="" type="checkbox"/> 本地流動電話號碼 Local Mobile Phone No.  (852) <b>9876 5432</b>	<input type="checkbox"/> 住宅電話號碼 Residential Phone No.  (852)		<input type="checkbox"/> 香港以外電話號碼 Phone No. outside HK ( ) - ( ) - 國家編號 地區編號 Country Code Area Code		
<input checked="" type="checkbox"/> 電郵地址 Email Address	<b>abc123@yahoo.com.hk</b>				

☐ 更改成員簽名式樣<sup>^</sup> Change of Member's Specimen Signature

<sup>^</sup> 本人此後將使用新的簽署式樣簽署任何與本計劃有關之文件、書信及其他書面指示，由生效日期起直至本人另行通知為止。此簽署安排將取替以往的簽署式樣。

以往的簽署式樣必須與之前遞交至中銀國際英國保誠信託有限公司的式樣相同。如閣下尚未提供或忘記以往的簽署式樣，請同時提供香港身份證/護照副本，並於該副本上簽署新的簽署式樣並註明“僅供身份確認及更新本人資料之用”。

I, hereby adopt the new specimen signature to sign any documents, correspondences & written instructions with regard to the Scheme in future, which shall remain valid until further notification is given. This signing arrangement will supersede the previous specimen signature submitted by me.

Previous specimen signature must be the same as the latest one submitted to BOCI-Prudential Trustee Limited. If you have not yet provided or forget your previous signature, please also provide a copy of your HKID Card/ Passport with your new specimen signature, and mark "For the purposes of identification & updating my particulars only".

以往的簽署式樣  
Previous Specimen Signature

新的簽署式樣  
New Specimen Signature

丙部 中銀保誠信託收集個人資料聲明  
PART C BOCPT PERSONAL INFORMATION COLLECTION STATEMENT ("B

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，投資選擇及累算權益，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「丁部分 - 聲明及簽署」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 D - Declaration 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聯公司）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（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.

- (1) 本人確認此申請表上提供的所有資料均為真實及準確無誤。本人並承諾若提供之資料有任何變更，本人將在合理及切實可行之情況下盡快通知中銀國際英國保誠信託有限公司(「受託人」)。  
I confirm that all the information provided in this application form is true and accurate in all aspects. I further undertake that if there is any change in the information so provided, I shall notify BOCI-Prudential Trustee Limited (the "Trustee") of such change as soon as reasonably practicable.
- (2) 本人明白若本人未能提供此表格所要求之資料，受託人將不能處理本人之申請。本人確認已閱讀、明白及同意丙部內的中銀保誠信託收集個人資料聲明。  
I acknowledge that failure to provide the data requested in this form may result in the Trustee being unable to process my application. I confirm that I have read, understood and agreed to the BOCPT PICS in Part C.
- (3) 本人知悉及同意，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)。  
I 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).
- (4) 本人承諾，如本人的稅務居住地相關的情況有所改變，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。  
I undertake to notify the Trustee within 30 days if there is any change in circumstances relating to my status of tax residency(ies) that makes any of the information provided in any parts of the self-certification in this form incorrect or incomplete and provide an updated self-certification form.
- (5) 為了通過自動櫃員機及/或其他渠道，包括但不限於網上銀行、手機銀行、綜合銀行結單及分行網絡等(「銀行服務」)獲得本人的強積金帳戶的最新資料，本人同意並授權受託人將本人的個人資料轉移至以下銀行：  
In order to obtain the latest information of my MPF account via Automatic Teller Machine ("ATM") and / or such other channels, including but not limited to internet banking, mobile banking, consolidated bank statement and branch network etc ("Bank Services"), I agree and authorize the Trustee to transfer my personal data to the following banks:  
中國銀行(香港)有限公司  
Bank of China (Hong Kong) Limited  
南洋商業銀行有限公司  
Nanyang Commercial Bank, Limited  
集友銀行有限公司  
Chiyu Banking Corporation Limited

若客戶不欲其個人資料用作直接促銷用途，請在方格內填上剔號

- ☐ 如果閣下不同意根據中銀保誠信託收集個人資料聲明提供，使用及轉移閣下的個人資料作直接促銷目的，請在左面的方格填上「✓」。如果閣下沒有在方格中填上「✓」，則表示閣下已同意提供，使用和轉移其個人資料作直接促銷目的。  
Please tick the box if you do not agree with the provision, use and transfer of your personal data for direct marketing purposes in accordance with the BOCPT PICS. If you do not tick the box, you are deemed to have given your consent for the provision, use and transfer of your personal data for direct marketing purposes.
- ☐ 如果閣下不同意根據中銀保誠信託收集個人資料聲明提供，使用及轉移閣下的個人資料作銀行服務，請在左面的方格填上「✓」。如果閣下沒有在方格中填上「✓」，則表示閣下已同意提供，使用和轉移其個人資料作銀行服務。  
Please tick the box if you do not agree with the provision, use and transfer of your personal data for Bank Services in accordance with the BOCPT PICS. If you do not tick the box, you are deemed to have given your consent for the provision, use and transfer of your personal data for Bank Services.

若客戶不欲轉移其個人資料作銀行服務(如: 不欲透過銀行渠道查詢其強積金戶口情況的話)，請在方格內填上剔號

成員簽署

Chan Tai Man

21 Nov 2022

成員簽署 Signature of Member

日期 Date (日 DD/月 MM/年 YYYY)

公司專用 For Official Use Only

Input by:		Date of Input:	
Verified by:		Date of Verification:	