

**作出整筆可扣稅自願性供款申請表 (只適用於現有成員)**  
**Application for Making Lump Sum Tax Deductible Voluntary Contributions**  
**(For Existing Member Only)**

注意 Note:

- 請以正楷填寫。Please complete in BLOCK LETTERS.
- \*請刪除不適用者。\* Please delete whichever is inappropriate.

**重要提示 Important Note**

閣下須填妥(III)部之“投資指示”以確認是次供款之投資組合。若(III)部投資指示未有填寫或無效，有關供款將會根據預設投資策略作出投資。  
 Please indicate your fund choice on Part (III) “Investment instruction” for contribution. If investment instruction is left blank or deemed invalid, contribution will be invested in accordance with Default Investment Strategy (“DIS”).

**(I) 計劃成員資料 PERSONAL DETAILS OF SCHEME MEMBER**

計劃編號 Scheme No.	成員姓名 Member Name 中文 Chinese 英文 English *先生/女士 *Mr/Ms
*香港身份證/護照號碼*HKID Card/Passport No	聯絡號碼 Contact No 電郵地址 Email Address
資金來源 (供款資金須由成員自付) Source of Fund (Contributions should be paid from your own funds)	<input type="checkbox"/> 來自薪金的儲蓄 Savings from Salary <input type="checkbox"/> 經營業務 Business <input type="checkbox"/> 繼承遺產 Inheritance <input type="checkbox"/> 投資 Investment <input type="checkbox"/> 出售資產 Sale of Asset(s) <input type="checkbox"/> 其他 Others (請註明 please specify): _____
職業 Occupation	<input type="checkbox"/> 公司董事 Company Director <input type="checkbox"/> 行政人員 Executive <input type="checkbox"/> 專業人士 Professional <input type="checkbox"/> 自僱 Self-employed <input type="checkbox"/> 文職 Clerical <input type="checkbox"/> 技術員/工人 Technician/Worker <input type="checkbox"/> 公務員 Civil Servant <input type="checkbox"/> 其他 Others (請註明 please specify): _____
工作性質 Job Nature	<input type="checkbox"/> (CLEA) 清潔服務 Cleaning Service <input type="checkbox"/> (CONT) 建築/工程/翻新 Construction/Engineering/ Renovation <input type="checkbox"/> (ENTE) 娛樂 Entertainment <input type="checkbox"/> (FINA) 金融/保險/投資 Finance/Insurance/Investment <input type="checkbox"/> (HEAL) 醫務/藥物/化學 Health/Pharmaceuticals/Chemical <input type="checkbox"/> (MANU) 製造業 Manufacturing <input type="checkbox"/> (NURS) 療養院 Nursing Home <input type="checkbox"/> (PRIN) 印刷/出版 Printing/Publishing <input type="checkbox"/> (PROF) 律師/會計師/建築師/測量師 Lawyer/ Accountant/ Architect/Surveyor <input type="checkbox"/> (REAL) 房地產 Real Estate <input type="checkbox"/> (REST) 餐廳/餐飲/酒店 Restaurant/Catering/Hotel <input type="checkbox"/> (RETL) 批發/零售 Wholesale/Retail <input type="checkbox"/> (SCHL) 學校/幼稚園/教育 School/Kindergarten/Education <input type="checkbox"/> (SECU) 保安服務/物業管理 Security Service/Property Management <input type="checkbox"/> (SOCL) 社區/社會服務 Community/Social Service <input type="checkbox"/> (TEXT) 紡織/成衣 Textile/Garment <input type="checkbox"/> (TMTT) 通訊/傳媒/科技 Telecommunication/Media/Technology <input type="checkbox"/> (TRAD) 入口/出口/貿易 Import, Export/Trading <input type="checkbox"/> (TRAN) 交通/儲存倉 Transport/Storage <input type="checkbox"/> (TRAV) 旅遊 Travel <input type="checkbox"/> (OTHE) 其他，請註明 Others, please specify _____
全年收入約為 Estimated Annual Income	<input type="checkbox"/> 港幣 200,000 以下 HK\$ 200,000 or below <input type="checkbox"/> 港幣 200,001 至 500,000 HK\$ 200,001 to HK\$ 500,000 <input type="checkbox"/> 港幣 500,001 以上 Above HK\$ 500,001

**(II) 供款資料 CONTRIBUTION DETAILS**

**整筆供款<sup>1</sup> Lump Sum Contribution<sup>1</sup>**  
 (每整筆供款最低供款額為港幣 1,000 元正 Lump Sum Contribution is subject to a minimum amount of HK\$1,000)  
 為方便儘速處理閣下之申請，請將此申請表連同劃線支票<sup>2</sup>一同交回受託人，支票抬頭為「中銀國際英國保誠信託有限公司」。請勿郵寄現金或於任何銀行櫃面繳交。  
 To expedite processing your application, please return this form to the Trustee together with a crossed cheque<sup>2</sup> made payable to “BOCI-Prudential Trustee Limited”. Do not send cash or make payment at any bank counter.

銀行名稱 Name of Bank : \_\_\_\_\_ 支票號碼 Cheque Number : \_\_\_\_\_ 支票金額 Cheque Amount HK\$: \_\_\_\_\_

**註 Remarks:**

- 若成員於某一課稅年度內(即自某年度的 4 月 1 日至下年度的 3 月 31 日)就其於本計劃所開立之可扣稅自願性供款賬戶，作出累計超過該課稅年度之最高稅務優惠金額(該金額載於《稅務條例》(第 112 章)的附表 3F 內)，受託人可能會暫停接受於同一課稅年度內後續的可扣稅自願性供款。有關該課稅年度內可扣稅自願性供款的最高稅務優惠金額，請瀏覽本公司網站 www.bocpt.com。If the total amount of TVC made by a TVC member to his/her TVC account opened in the Scheme in a particular year of tax assessment (i.e. from 1st April for that particular year to 31st March on the next year) exceeds the maximum tax concession amount for TVC in the relevant year of assessment as set out in Schedule 3F of the Inland Revenue Ordinance (Cap.112), the Trustee may refuse to accept further TVC from that TVC member for that year of tax assessment. Please refer to our website at www.bocpt.com for the aforesaid maximum tax concession amount for that year of tax assessment.
- 閣下之支票賬戶名稱必須與本申請表上所示申請人全名相同。The account name of the cheque must be the same as the Applicant Full Name on this Form.

(III) 投資指示 (只適用於整筆可扣稅自願性供款)

INVESTMENT INSTRUCTION (For Lump Sum of Tax Deductible Voluntary Contributions only)

請指示有關供款之新的投資組合。就每類供款之投資指示，每項已選擇的投資選項分佈必須為整數及不少於 5%，而所有已選擇的投資選項總和必須為 100%，否則閣下的投資指示將被視為無效。閣下不一定需填寫此部分，但如留空此部分，或如閣下的投資指示被視為無效，閣下有關供款將會根據預設投資策略作出投資。預設投資策略是一個現成及設有收費上限的強積金投資方案，並設有按年齡自動降低投資風險的特點。成分基金及預設投資策略詳情請參閱有關銷售文件，該等文件可向強積金中介人或客戶服務中心索取，亦可於本公司網站 www.bocpt.com 下載。成員必須注意投資市場可能出現顯著的波動，基金單位價格可跌可升。由於處理有關投資指示需要一定的時間，因此未必能夠保證達到閣下預期的結果。在作出投資選擇前，閣下必須小心衡量個人可承受風險的程度及財政狀況(包括閣下的退休計劃)。如有任何疑問，請諮詢閣下的獨立財務顧問了解更多詳情。請注意，當閣下有一項或多項特定的指示(包括但不限於贖回或轉換指示)與每年的降低風險同一日處理時，每年的降低風險將會待完成所有特定指示後才執行(如需要)。Please indicate your NEW investment choices for relevant contributions. Investment instruction for each type of contributions must be an integer with a minimum of 5% per selected investment choice, and the total percentage must be equal to 100%; otherwise your investment instruction will be deemed invalid. This section is optional for you to fill in, but if this section is left blank or if your investment instruction is deemed invalid, your relevant contributions will be invested in accordance with Default Investment Strategy ("DIS"). DIS is a ready-made MPF investment strategy with fee caps, and also contains an automatic de-risking feature. Details of the constituent funds and DIS please refer to the offering documents which are available upon request from MPF intermediaries or at the Customer Service Centre, it can also be downloaded from website at www.bocpt.com. Members should note that investment markets could fluctuate significantly. Fund prices may go down as well as up. There is no guarantee that, given the time required to implement relevant investment instructions, such instructions will achieve your desired results. Please carefully consider your own risk tolerance level and financial circumstances (as well as your own retirement plan) before making any investment choices. If in doubt, please contact your independent financial advisor for further details. Please note that when one or more of the specified instructions (including but not limited to redemption or switching instructions) are being processed on the annual date of de-risking for you, the annual de-risking will only take place after completion of these instructions where necessary.

閣下可隨時透過以下途徑作出有效的特定投資指示 You may make your valid specific investment instruction through the following channels at any time :

- (i) 互聯網 Internet (ii) 互動話音系統 Interactive Voice Response System (iii) 流動應用程式 Mobile apps (iv) 表格 Form

注意：如需於本部分作任何塗改，請於塗改處旁加簽作實。 Note: Please countersign if any amendment is made in this part.

Table with 4 columns: Investment Choice, Investment Choice, Lump Sum of Tax Deductible Voluntary Contribution Allocation (1), and Note. Rows include various fund options like Default Investment Strategy, My Choice Growth Fund, etc., with a total of 100%.

備註 REMARKS:

(1) 此投資指示只適用於此表格(II)部所述之供款，並不可視作預設將來的新供款或更改現存戶口的投資基金組合。This investment instruction will only apply to the contributions of Part (II) of this form and will not apply to the investment mandate for future contributions or the existing investment fund account balance.

(IV) 聲明及簽署 DECLARATION AND SIGNATURE

我以簽署此通知書作為聲明此通知書內所提供之資料為真實及正確。 I declare that all information given in this Notice is true and correct by signing of this Notice.

成員簽署 Member Signature

日期 Date

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Table with 4 columns: Input by, Date, Verified by, Date.