

更改可扣稅自願性供款投資基金組合授權書 Change of Investment Fund Instruction of Tax Deductible Voluntary Contributions

注意 Note:

- 請以正楷填寫。
Please complete in BLOCK LETTERS.
- 若未有適當簽署本表格，本表格將被視為無效，受託人並無責任執行本表格上填寫的指示。
The form would be deemed invalid if it is not duly signed, and the trustee shall be under no obligation to process the instruction.
- 請於任何刪改處旁邊加簽。
Please initial next to any alterations made on the form.
- 本表格不適用於更改未來整筆可扣稅自願性供款投資組合。
This form is not applicable for changing investment mandate for Future Lump Sum Tax Deductible Voluntary Contributions
- 中銀國際英國保誠信託有限公司(「受託人」)會於收到閣下適當填妥的表格後兩個工作天內處理閣下的指示。有關報表將於完成上述指示後一星期內寄發，如閣下未收到有關報表或有任何錯漏，請即致電 2929-3366 與本公司的客戶服務代表聯絡。
Your instructions will be processed within 2 working days after BOCI-Prudential Trustee Limited (the "Trustee") receives your duly completed form. A confirmation Statement will be issued within 1 week after completion of your instructions. Please contact our Customer Service Representatives at 2929-3366 if you do not receive the statement or any error is found.
- 若閣下想轉換現存可扣稅自願性戶口資產之投資分佈，請填寫「基金轉換指示(只適用於現有戶口結餘)」。
If you wish to give the switching instruction of existing Tax Deductible Contribution account, please fill in "Fund Switching Instruction (for Existing Account Balance Only)".
- 為免重複，已傳真之表格，無須再另行郵寄。
After you have faxed the completed form, please do not mail the form to avoid duplication.
- 如閣下轉換的基金單位之數額有機會引致同一成分基金贖回單位總數超出已發行單位總數的 10%，有關轉換有可能分開不同日子處理。
If your number of units to be redeemed in this instruction may result in exceeding 10% of the total number of units in issue, your instruction may be processed on separate dates.

(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 English *先生/女士 *Mr/Ms
香港身份證/護照*號碼 HKID Card/Passport* No.	電郵地址 E-mail Address
流動電話號碼 Mobile Phone No.	住宅電話號碼 Residential Phone No.

*請刪除不適用者。*Please delete whichever is inappropriate.

(II) 投資指示 INVESTMENT INSTRUCTION

請指示有關供款之新的投資組合。就每類型供款之投資指示，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，受託人將沒有責任處理有關指示。閣下的投資將按照背頁指示作出投資，直至閣下另行通知受託人為止。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 and the trustee shall be under no obligation to process the instructions. Your investment will be processed as indicated overleaf until further notice to the contrary is received from you by the Trustee. Default Investment Strategy ("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 :

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| (i) 互聯網 Internet | (ii) 互動語音系統 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.

(II) 投資指示 (續) INVESTMENT INSTRUCTION (CONTINUED)

投資選項 Investment Choice			供款分佈 Contribution Allocation	
			現有賬戶結餘 ^{(1)&(3)} Existing Account Balances ^{(1)&(3)}	新供款 ^{(2)&(3)} Future Contributions ^{(2)&(3)}
預設投資策略	Default Investment Strategy	MyDIS	%	%
我的增長基金	My Choice Growth Fund	MyGF	%	%
我的均衡基金	My Choice Balanced Fund	MyBF	%	%
我的平穩基金	My Choice Stable Fund	MySF	%	%
我的環球股票基金	My Choice Global Equity Fund	MyGE	%	%
我的亞洲股票基金	My Choice Asia Equity Fund	MyAE	%	%
我的中國股票基金	My Choice China Equity Fund	MyCE	%	%
我的香港股票基金	My Choice Hong Kong Equity Fund	MyHKE	%	%
我的香港追蹤指數基金	My Choice Hong Kong Tracking Fund	MyTF	%	%
我的環球債券基金	My Choice Global Bond Fund	MyGB	%	%
我的港元債券基金	My Choice HKD Bond Fund	MyHB	%	%
我的人民幣及港元貨幣市場基金	My Choice RMB & HKD Money Market Fund	MyRMM	%	%
我的強積金保守基金	My Choice MPF Conservative Fund	MyCPE	%	%
我的核心累積基金	My Choice Core Accumulation Fund	MyCAF	%	%
我的 65 歲後基金	My Choice Age 65 Plus Fund	MA65F	%	%
注意：降低風險機制將不適用於獨立選擇的「我的核心累積基金」及/或「我的 65 歲後基金」。 Note: De-risking mechanism would not apply to standalone My Choice Core Accumulation Fund and or My Choice Age 65 Plus Fund.				
總計 TOTAL			100 %	100 %

注意：如有更改，請加簽作實。
Note: Please counter-sign if any amendment is made.

備註 Remarks:

- (1) 此指示將重新調配現有戶口的投資基金組合結餘，並不適用於新供款（即新供款及轉移自另一項強積金計劃的可扣稅額外自願性供款）的供款投資組合。
This instruction will rebalance the **existing** investment fund account balances, and will not apply to the investment mandate for **future contributions** (i.e. future contributions and tax deductible voluntary contributions transferred from another MPF scheme).
- (2) 此指示只適用於新供款（即新供款及轉移自另一項強積金計劃的可扣稅額外自願性供款）的投資組合，並不適用於現有戶口結餘。
This instruction will apply to your **future contributions** only (i.e. future contributions and tax deductible voluntary contributions transferred from another MPF scheme), and will not apply to your existing investment fund account balances.
- (3) 請注意，本表格只適用更改可扣稅自願性供款的投資指示，其他供款的投資安排將維持不變。
Please note that this changes of investment instruction only applicable to of the tax deductible voluntary contributions only, the investment arrangement of other types of contributions will remain unchanged.

成員全名 Member's Full Name

成員簽署 Member's Signature



日期 Date

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