

基金轉換指示 (只適用於現有戶口結餘)

Fund Switching Instruction (for Existing Account Balance Only)

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.
- 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.
- 若閣下想重新調配有戶口的投資基金組合或更改新供款投資組合/重新調配特別自願性供款的投資基金組合，請填寫「更改特別自願性供款投資基金組合授權書」。If you wish to rebalance the existing investment fund account balances or change your investment choice for the future contribution / rebalance the **special voluntary contribution** account balances, please fill in "Change of Investment Fund Instruction of Special Voluntary Contribution".
- 若閣下想重新調配有戶口的投資基金組合或更改新供款投資組合/重新調配可扣稅自願性供款的投資基金組合，請填寫「更改可扣稅自願性供款投資基金組合授權書」。If you wish to rebalance the existing investment fund account balances or change your investment choice for the future contribution / rebalance the **tax deductible voluntary contribution** account balances, please fill in "Change of Investment Fund Instruction of Tax Deductible Voluntary Contributions".
- 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	流動電話號碼 Mobile Phone No.	住宅電話號碼 Residential Phone No.	電郵地址 E-mail Address

* 請刪去不適用者。* Please delete whichever is inappropriate.

(II) 現有戶口結餘的基金轉換指示 FUND SWITCHING INSTRUCTION FOR EXISTING ACCOUNT BALANCE

請指示現有戶口結餘之基金轉換。供款戶口內的所有結餘，包括僱主部分及成員部分(如適用，但不包括未來所支付的供款)將按照背頁指示作出基金轉換。
Please indicate your fund switching instruction for the existing fund account balances. All balances standing to the credit of all contribution accounts including the employer's portion and the member's portion (if applicable, but excluding future contributions) will be processed as indicated overleaf.

就與特別自願性供款有關的基金轉換指示，該指示將適用於定期特別自願性供款。
For the fund switching instruction relating to special voluntary contributions, the instruction shall apply to regular special voluntary contributions.

就與可扣稅自願性供款有關的基金轉換指示，該指示將同時適用於定期及整筆可扣稅自願性供款。
For the fund switching instruction relating to tax deductible voluntary contributions, the instruction shall apply to both regular and lump sum tax deductible voluntary contributions.

「轉出百分比」指閣下欲贖回現時所持有的基金單位之百分比(請注意，剩餘之百分比將繼續投資於現有基金)。閣下可填寫多於一項投資基金於「轉出百分比」內。閣下可就每一類型之供款分別作出投資指示，如閣下只就某類型供款之累算權益作出投資指示，其他供款類型之累算權益的投資安排將維持不變。
"Switching Out %" means the percentage of current units holding of a fund you wish to redeem (Please note that the remaining % will continue to invest in current fund). You may fill in more than one investment fund under the "Switching Out %" column. You may give investment instruction for each type of contributions separately, if you give investment instruction to certain types of contributions only, the investment arrangement of accrued benefits of other types of contributions will remain unchanged.

所有百分比應是整數且每項不少於5%及「轉出資產的分配」內的總計必須為100%，否則此指示將被視為無效，受託人將沒有責任處理有關指示。
All percentage must be an integer with a minimum of 5% per selected investment choice and the total under "Allocation of Switch Out Proceeds" should be 100%, otherwise this instruction will be treated as invalid and the trustee shall be under no obligation to process to execute the instruction.

於同日以網上、傳真或郵遞方法遞交之「現有戶口結餘的基金轉換指示」或「重新調配有戶口的投資基金組合指示」，只受理其中一項，並以本公司最新收到的指示為準。
Only ONE request of either "Fund Switching Instruction for Existing Account Balance" or "Rebalancing of Existing Account Balance" via WEB, facsimile or mailing in the same day will be accepted, and the latest instruction received by us will prevail.

於上述基金轉換交易未完成之前，不能接受新遞交之「現有戶口結餘的基金轉換指示」或「重新調配有戶口的投資基金組合指示」。
Before this switching transaction has completed, new request of either "Fund Switching Instruction for Existing Account Balance" or "Rebalancing of Existing Account Balance" will not be accepted.

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。
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.

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。
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.

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 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) 現有戶口結餘的基金轉換指示 (續)
FUND SWITCHING INSTRUCTION FOR EXISTING ACCOUNT BALANCE (CONTINUED)

投資選項 Investment Choice		強制性供款 Mandatory Contributions		標準自願性供款 Standard Voluntary Contributions		定期特別自願性供款 Regular Special Voluntary Contributions		可扣稅自願性供款 (包括定期及整筆供款) Tax Deductible Voluntary Contributions (Include Regular and Lump Sum contributions)	
		轉出百分比 Switch Out %	轉出資產的分配 Allocation of Switch Out Proceeds	轉出百分比 Switch Out %	轉出資產的分配 Allocation of Switch Out Proceeds	轉出百分比 Switch Out %	轉出資產的分配 Allocation of Switch Out Proceeds	轉出百分比 Switch Out %	轉出資產的分配 Allocation of Switch Out Proceeds
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%	總計 TOTAL	100%	總計 TOTAL	100%	總計 TOTAL	100%
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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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