

第 MPF(S) - P(P) 號表格  
FORM MPF(S) - P(P)

「僱員自選安排」－轉移選擇表格  
EMPLOYEE CHOICE ARRANGEMENT (ECA) - TRANSFER ELECTION FORM

(適用於僱員在現職期間把現職的計劃(原計劃)供款帳戶內的強積金累算權益(權益)轉移至自選計劃(新計劃)的帳戶)

(For an employee to transfer MPF accrued benefits (benefits) from a contribution account in an MPF registered scheme (scheme) under current employment (Original Scheme) to an account in a scheme elected by the employee (New Scheme) during employment)

《強制性公積金計劃(一般)規例》(第485A章)第148A及148B條  
Sections 148A and 148B of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)

- (a) 填寫本表格前，請先閱讀第6至8頁的《「僱員自選安排」強積金累算權益(權益)轉移指南》(《指南》)。
- Please read the "Guide to Transfer of MPF Accrued Benefits (Benefits) under Employee Choice Arrangement (ECA)" (the Guide) on pages 6 to 8 before you complete this Form.
- (b) 你就此項轉移申請提供的個人資料，將用作處理你的轉移申請。你提供的個人資料可能會為該目的而轉交相關受託人、相關服務提供者，以及政府或規管機構，包括強制性公積金計劃管理局(積金局)。
- The personal data to be supplied in support of this election of transfer are to be used for processing your election of transfer. The personal data you supply may, for such purpose, be transferred to the trustee(s) concerned, the relevant service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority (MPFA).

第 I 部：計劃成員資料				
SECTION I: SCHEME MEMBER DETAILS				
姓名 <sup>註1</sup> (與香港身份證上的姓名相同) Name <sup>1</sup> (as shown on your Hong Kong Identity (HKID) Card)	姓氏： Surname:			
	名字： Other Name:			
身分證明 Identification	香港身份證號碼： HKID Card No.:			
	護照號碼： (僅供沒有香港身份證的計劃成員填寫) Passport No.: (ONLY for scheme member without HKID Card)			
聯絡資料 Contact Details	日間聯絡電話號碼： Daytime Phone No.:		手提電話號碼： Mobile Phone No.:	
	電郵地址(如有)： Email Address (if any):			
通訊地址 Correspondence Address	室 Flat/Room	樓層 Floor	座 Block	大廈 Building
	屋邨 Estate		街道號碼 Street No.	街道 Street
	香港／九龍／新界(請刪去不適用者) Hong Kong / Kowloon / New Territories (delete whichever is inappropriate)			國家／地區名稱(如非香港以內) Country / Region (if not in Hong Kong)

第 II 部：原計劃的供款帳戶資料	
SECTION II: CONTRIBUTION ACCOUNT INFORMATION IN ORIGINAL SCHEME	
原計劃名稱 <sup>註2</sup> Name of Original Scheme <sup>2</sup>	
計劃成員帳戶號碼 <sup>註2</sup> Scheme Member Account No. <sup>2</sup>	
僱主識別號碼 <sup>註2,3</sup> Employer's Identification No. <sup>2,3</sup>	

### 第 III 部：轉移權益<sup>註 4</sup>

#### SECTION III: TRANSFER OF BENEFITS<sup>4</sup>

請註明你擬把原計劃供款帳戶內哪部分的權益轉移至另一個強積金帳戶。

請選擇方案(a)或(b)，並在適當方格內加上✓號：

Please indicate the part(s) of benefits in your contribution account of Original Scheme that you wish to transfer out to another MPF account.

Please select either option (a) or (b) and ✓ as appropriate:

#### ☐ (a) 轉移全部權益

##### Transfer ALL Benefits

本人擬在管限規則准許下轉移原計劃供款帳戶內以下全部權益：

I wish to transfer ALL the benefits comprising the following parts from my contribution account of Original Scheme as its governing rules permit:

- 現職期間的僱員強制性供款<sup>註 5、6</sup>

Employee mandatory contributions in current employment<sup>5,6</sup>

- 現職期間的僱員自願性供款<sup>註 7、8</sup>

Employee voluntary contributions in current employment<sup>7,8</sup>

- 以往工作所累積並已轉移至供款帳戶的強制性供款<sup>註 9</sup>

Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s)<sup>9</sup>

- 以往工作所累積並已轉移至供款帳戶的自願性供款<sup>註 8、10</sup>

Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s)<sup>8,10</sup>

請把權益轉移至以下個人帳戶：

Please transfer the benefits to the following personal account:

新計劃名稱 <sup>註 11</sup> Name of New Scheme <sup>11</sup>	
計劃成員帳戶號碼 <sup>註 11</sup> Scheme Member Account No. <sup>11</sup>	

或 OR

#### ☐ (b) 轉移部分權益

##### Transfer Part(s) of Benefits

本人擬在管限規則准許下轉移原計劃供款帳戶內以下部分權益：

(你可選擇轉移以下其中一部分或多個部分，請於適當方格內填上✓號)

I wish to transfer the following part(s) of the benefits from my contribution account of Original Scheme as its governing rules permit: (you may select one or more parts below and ✓ as appropriate)

由原計劃轉出的權益 Benefits to be transferred from Original Scheme	接收權益 的帳戶類別 Type of account receiving the benefits
<input type="checkbox"/> 現職期間的僱員強制性供款 <sup>註 5、6</sup> Employee mandatory contributions in <u>current</u> employment <sup>5,6</sup>	只限個人帳戶 Personal account only
<input type="checkbox"/> 現職期間的僱員自願性供款 <sup>註 7、8</sup> Employee voluntary contributions in <u>current</u> employment <sup>7,8</sup>	
<input type="checkbox"/> 以往工作所累積並已轉移至供款帳戶的強制性供款 <sup>註 9</sup> Mandatory contributions that have been transferred into the contribution account and are attributable to <u>former</u> employment(s) <sup>9</sup>	個人帳戶 或 供款帳戶 Personal account or contribution account
<input type="checkbox"/> 以往工作所累積並已轉移至供款帳戶的自願性供款 <sup>註 8、10</sup> Voluntary contributions that have been transferred into the contribution account and are attributable to <u>former</u> employment(s) <sup>8,10</sup>	

請把上述選擇的權益轉移至以下帳戶：

Please transfer the benefits selected above to the following account:

新計劃名稱 <sup>註 11</sup> Name of New Scheme <sup>11</sup>	
帳戶類別 <sup>註 11</sup> (只可選一項*, 請於適當方格內加上✓號) Account Type <sup>11</sup> (Select one only* and ✓ as appropriate)	<input type="checkbox"/> 個人帳戶 Personal account <b>或 OR</b> <input type="checkbox"/> 供款帳戶 Contribution account (僱主識別號碼 <sup>註 3, 11</sup> Employer's Identification No. <sup>3, 11</sup> : )
計劃成員帳戶號碼 <sup>註 11</sup> Scheme Member Account No. <sup>11</sup>	

\* 如欲把供款帳戶內不同部分的權益轉移至不同的強積金帳戶, 請就每個將會接收該等權益的強積金帳戶分別填寫一份第 MPF(S)-P(P) 號表格。

\* If you wish to transfer different parts of benefits from your contribution account to different MPF accounts, please fill in a separate Form MPF(S)-P(P) for each MPF account that receives the benefits.

#### 第 IV 部：授權及聲明

#### SECTION IV: AUTHORIZATION AND DECLARATION

(a) 本人同意, 新計劃的受託人及積金局可為處理本人的轉移申請, 向相關受託人及相關服務提供者披露本人就此項轉移申請提供的資料, 或使該等機構/人士能夠取覽或披露該等資料。

I hereby give consent to the trustee of New Scheme and the MPFA to disclose information supplied by me in support of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

(b) 本人確認及聲明：

I confirm and declare that:

- 本人已閱讀及明白註釋及《指南》的內容, 並自願選擇按照本表格轉移強積金權益;

I have read and understood the Explanatory Notes and the Guide, and have voluntarily elected to transfer my MPF benefits in accordance with this Form;

- 在提交本表格當日, 本人受僱於為本人開立原計劃供款帳戶的僱主; 及

at the date of submitting this Form, I am employed by the employer in relation to the contribution account in Original Scheme; and

- 盡本人所知所信, 本表格所提供的資料均屬正確無訛且無缺漏。

to the best of my knowledge and belief, the information given in this Form is correct and complete.

簽署<sup>註 12</sup>

Signature<sup>12</sup>

日期 (日/月/年)

Date (DD/MM/YYYY)

填妥本表格後, 請把第 1 頁至第 3 頁交予新計劃的受託人  
~Please send pages 1 to 3 of this Form to the trustee of New Scheme after completion~

#### 經紀/ 銀行職員資料 Agent / Bank Staff Information

銀行編號 Bank Code	分行編號 Branch Code	強積金中介人註冊編號 MPF Intermediary Registration No.
經紀編號/經紀姓名 Agent Code/Agent Name		經紀簽署 Signature of Agent

## 註釋 Explanatory Notes

- (1) 如你**沒有**香港身份證，請填上你在護照上的姓名。

If you do NOT possess a HKID Card, please fill in your name as shown on your passport.

- (2) 如你沒有提供原計劃名稱、計劃成員帳戶號碼或僱主識別號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可於成員證明書、接納通知、參與通知或周年權益報表獲取有關資料。如有疑問，請聯絡你原計劃的受託人或僱主。有關強積金計劃的名稱，可參閱積金局網站（[www.mpfa.org.hk](http://www.mpfa.org.hk)）的資料。

The transfer election may not be processed if the Name of Original Scheme, Scheme Member Account Number or the Employer's Identification Number is not provided or is incorrect. This information can be found in your membership certificate, notice of acceptance, notice of participation or annual benefit statement. If you are in doubt, please contact your trustee of Original Scheme or your employer. Please refer to the MPFA website ([www.mpfa.org.hk](http://www.mpfa.org.hk)) for the name of schemes.

- (3) 僱主識別號碼即受託人為有關僱主編配的號碼。受託人或會使用不同名稱來設定此號碼（例如帳戶編號、僱主編號、合約編號、強積金客戶編號、參與計劃編號、計劃編號、附屬計劃編號）。你可查閱受託人發出的報表或透過受託人提供的成員查詢服務獲取該號碼。如有疑問，請聯絡你的受託人或僱主。

The Employer's Identification Number is the number assigned by the trustee to the employer concerned. Trustees may use different names for this number (e.g. account number, company code, contract number, employer account number, employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). The number can be found in the statements issued by the trustees or through the member enquiry facilities available from the trustees. If you are in doubt, please contact your trustee or your employer.

- (4) 如你在第 III 部選擇轉移的權益的任何部分是「零」結餘，則該部分權益的轉移申請將不獲處理。

If any part of the benefits chosen under section III contains nil balance, that part will not be processed.

- (5) (a) 這是指《強制性公積金計劃（一般）規例》（《規例》）第 78(6)(b)條所提述的分帳戶內的全部權益。

This means all benefits in the sub-account referred to in section 78(6)(b) of the Mandatory Provident Fund Schemes (General) Regulation (the Regulation).

- (b) 就行業計劃的臨時僱員而言，這個分帳戶一般包含在成員以臨時僱員身分受僱於不同僱主期間向這個分帳戶所作出的所有僱員強制性供款所產生的權益。

For a casual employee in an industry scheme, this sub-account generally contains the benefits derived from all the employee mandatory contributions made to this sub-account whilst working as a casual employee with different employers.

- (6) 如你已於同一公曆年內要求把僱員強制性供款所產生的權益轉出一次（或如原計劃的管限規則准許你作出多於一次的轉移，但你轉移的次數已達該上限），則該部分權益的轉移申請將不獲處理。詳情請參閱《指南》第(4)段。

If you have already elected to transfer out the benefits derived from the employee mandatory contributions once (or, if the governing rules of Original Scheme allow more than once, but the transfer elections you have made have reached the maximum number of times allowed by the governing rules) in the same calendar year, transfer of that part of the benefits will not be processed. Please refer to paragraph (4) of the Guide for more information.

- (7) (a) 這是指《規例》第78(6)(c)條所提述的分帳戶內的全部權益。

This means all benefits in the sub-account referred to in section 78(6)(c) of the Regulation.

- (b) 就行業計劃的臨時僱員而言，這個分帳戶一般包含在以臨時僱員身份受僱於不同僱主期間向這個分帳戶所作出的所有僱員自願性供款所產生的權益。

For a casual employee in an industry scheme, this sub-account generally contains the benefits derived from all the employee voluntary contributions made to this sub-account whilst working as a casual employee with different employers.

- (8) 如你要求把自願性供款所產生的權益轉出，但原計劃的管限規則並不准許轉移，則有關轉移選項將不獲處理。詳情請參閱《指南》第(3)段。

If you request to transfer out the benefits derived from the voluntary contributions but the governing rules of Original Scheme do not allow this, the option(s) will not be processed. Please refer to paragraph (3) of the Guide for more information.

- (9) 這是指《規例》第78(6)(c)條所提述的分帳戶內的全部權益。這部分一般包含以往受僱或自僱工作所累積並已轉移至現職供款帳戶的強制性供款所產生的權益。

This means all benefits in the sub-account referred to in section 78(6)(c) of the Regulation. This part generally contains benefits derived from the mandatory contributions that are attributable to your former employment(s) or former self-employment(s) and that have been transferred into the contribution account under current employment.

- (10) 這是指《規例》第78(6)(f)條所提述的分帳戶內的全部權益。這部分一般包含以往受僱或自僱工作所累積並已轉移至現職供款帳戶的自願性供款所產生的權益。

This means all benefits in the sub-account referred to in section 78(6)(f) of the Regulation. This part generally contains benefits derived from the voluntary contributions that are attributable to your former employment(s) or former self-employment(s) and that have been transferred into the contribution account under current employment.

- (11) 如你沒有提供新計劃名稱、帳戶類別、僱主識別號碼或計劃成員帳戶號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可於成員證明書、接納通知、參與通知或周年權益報表獲取有關資料。不過，如你最近才參加計劃，並未獲悉僱主識別號碼及計劃成員帳戶號碼，則可留空此項。如有疑問，請聯絡你新計劃的受託人。有關強積金計劃的名稱，可參閱積金局網站（[www.mpfa.org.hk](http://www.mpfa.org.hk)）的資料。

The transfer election may not be processed if the Name of New Scheme, Account Type, Employer's Identification Number or your Scheme Member Account Number is not provided or is incorrect. The information can be found in your membership certificate, notice of acceptance, notice of participation or annual benefit statement. You may, however, leave the Employer's Identification Number and the Scheme Member Account Number blank if you have recently enrolled in the scheme and have not been notified of those numbers. If you are in doubt, please contact your trustee of New Scheme. Please refer to the MPFA website ([www.mpfa.org.hk](http://www.mpfa.org.hk)) for the name of schemes.

- (12) 你的簽署必須與你之前給予原計劃的受託人的簽署式樣相同。請注意，若本表格上的簽署與你之前給予原計劃的受託人的簽署式樣不符，有關轉移或不獲處理。如有疑問，請聯絡你原計劃的受託人。

The signature must be the same as your specimen signature previously given to your trustee of Original Scheme. Please note that the transfer may not be processed if the signature provided in this Form does not match the specimen signature previously given to your trustee of Original Scheme. If you are in doubt, please contact your trustee of Original Scheme.

**「僱員自選安排」強積金累算權益(權益)轉移指南**  
**GUIDE TO TRANSFER MPF ACCRUED BENEFITS (BENEFITS) UNDER**  
**EMPLOYEE CHOICE ARRANGEMENT (ECA)**

《強制性公積金計劃(一般)規例》(第485A章)第148A及148B條  
Sections 148A and 148B of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)

**第 MPF(S)-P(P)號表格、註釋及本《指南》的用詞解釋：**

**Explanation of terms used in Form MPF(S)-P(P), the Explanatory Notes and this Guide:**

- (a) 「供款帳戶」—與《強制性公積金計劃(一般)規例》(《規例》)第2條所載的供款帳戶具有相同含義。一般是指強積金註冊計劃(計劃)下主要用以接收僱主為僱員所作出以及代表僱員所作出的強積金供款(包括僱主及僱員部分)的帳戶。供款帳戶亦包括自僱人士在新計劃下主要用以接收其在自僱期間所作出的強積金供款的帳戶。  
“Contribution account” – has the same meaning as in section 2 of the Mandatory Provident Fund Schemes (General) Regulation (the Regulation). Generally, it is an account in an MPF registered scheme (scheme) which is mainly used to receive MPF contributions (both employer and employee portions) made by an employer for an employee and on behalf of the employee. Contribution account may also include an account of a self-employed person in New Scheme which is mainly used to receive MPF contributions made by himself while self-employed.
- (b) 「個人帳戶」—與《規例》第2條所載的個人帳戶具有相同含義。一般是指計劃下主要用以接收由其他供款或個人帳戶轉入的權益的帳戶(不包括供款帳戶及可扣稅自願性供款帳戶)。  
“Personal account” – has the same meaning as in section 2 of the Regulation. Generally, it is an account (other than a contribution account and TVC account) in a scheme which is mainly used to receive the benefits transferred from other contribution or personal account(s).
- (c) 「原計劃」—指轉出你的權益的計劃。  
“Original Scheme” – the scheme from which your benefits are to be transferred.
- (d) 「新計劃」—指轉入你的權益的計劃。如你選擇把權益轉移至同一計劃的另一個帳戶，本表格所指的新計劃將與原計劃相同。  
“New Scheme” – the scheme to which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same scheme, the new scheme on this Form will be the same as the original scheme.
- (e) 「公曆年」—指由1月1日至12月31日的一年期間。  
“Calendar year” – the one-year period from 1 January to 31 December.

**僱員在「僱員自選安排」下可享的權利**

**Rights of employees under the ECA**

- (1) 在「僱員自選安排」下，僱員可在**受僱期間**，選擇把原計劃供款帳戶內的部分權益轉移至其自選新計劃的帳戶。  
Under the ECA, an employee can, during employment, make an election to transfer part of the benefits from a contribution account in Original Scheme to an account in New Scheme nominated by him.
- (2) 下表載列供款帳戶內由強制性供款所產生的各部分權益，以及這些權益在「僱員自選安排」下可作轉移的情況：  
The table below shows the parts of benefits derived from the mandatory contributions in a contribution account and the transferability of these parts of benefits in a contribution account under the ECA.

供款帳戶內的各部分權益 Parts of benefits in a contribution account		在「僱員自選安排」下權益可作轉移的情況 Under ECA
(a)	現職期間的僱主強制性供款 Employer mandatory contributions in current employment	不可轉移 Not transferable
(b)	現職期間的僱員強制性供款 Employee mandatory contributions in current employment	可 <b>每公曆年一次</b> <sup>1</sup> 轉出至強積金個人帳戶 Transferable to an MPF personal account <b>once per calendar year</b> <sup>1</sup>
(c)	以往工作所累積並已轉移至供款帳戶的強制性供款 Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s)	可隨時轉出至強積金個人帳戶或供款帳戶 Transferable to an MPF personal account or contribution account anytime

<sup>1</sup> 如原計劃的管限規則訂明可多次轉移權益，則不在此限。

<sup>1</sup> Unless the governing rules of Original Scheme provide for more frequent transfer-out.



- (3) 至於自願性供款所產生的權益是否可作轉移，則視乎原計劃的管限規則而定。有關規則的詳情，請查閱原計劃的要約文件。該文件可於原計劃受託人的網站下載，你也可向僱主查詢或聯絡原計劃的受託人索取有關文件。  
The transferability of benefits derived from voluntary contributions is subject to the governing rules of Original Scheme. Please check this information from the offering documents of Original Scheme, which can be found on the website of the trustee of Original Scheme. You may also consult your employer or contact the trustee of Original Scheme.
- (4) 你在每個公曆年內只可選擇轉出僱員強制性供款所產生的權益一次（如原計劃的管限規則訂明可多次轉出權益，則不在此限）。**新計劃的受託人收到已填妥的轉移選擇表格的日期將用作計算轉移次數有否超出限額。**你可於原計劃的受託人向你發出的轉移結算書上查閱該日期，或直接向原計劃的受託人查詢。  
You can only elect to transfer out the benefits derived from your employee mandatory contributions once per calendar year (unless the governing rules of Original Scheme provide for more frequent transfer-out). **The date the trustee of New Scheme receives the completed election form is adopted for counting that quota.** You may check that date from the transfer statement issued by your trustee of Original Scheme, or consult your trustee of Original Scheme directly.
- (5) 請注意，你在現職期間所作出的僱員強制性供款及僱員自願性供款（如有）所產生的權益只可轉移至**個人帳戶**，不可轉移至其他供款帳戶（註：如你同時從事多於一份受僱工作，則會持有其他供款帳戶）。  
Please note that the benefits derived from your employee mandatory contributions in current employment and employee voluntary contributions in current employment (if any) can be transferred to a **personal account** only. They cannot be transferred to another contribution account (Note: if you are concurrently working for more than one employer, you would have other contribution accounts).
- (6) 從原計劃轉出你的權益後，現職僱主日後為你作出的供款（包括僱主及僱員部分），將繼續分配至你在原計劃的供款帳戶。如你日後想把該等僱員強制性供款所產生的權益轉移至你在新計劃的帳戶，便須在下一個公曆年另行作出轉移選擇（如原計劃的管限規則訂明可在同一公曆年內多次轉出權益，則可提前在同一公曆年內選擇轉出權益）。  
After your benefits are transferred out from Original Scheme, future contributions made by your existing employer (both employer and employee portions) will continue to be made to your contribution account with the trustee of Original Scheme. If you want to transfer the benefits derived from the subsequent employee mandatory contributions to your account in New Scheme, you should make a separate transfer election in the next calendar year (or earlier if the governing rules of Original Scheme allow for more frequent transfer-out in a calendar year).

### **選擇作出轉移前的注意事項**

#### **Reminders before making an election to transfer**

- (7) 在你決定把權益轉移至另一計劃前，你應考慮以下因素：  
Before you decide to transfer your benefits to another scheme, you should take into consideration the following factors:
- (a) 受託人的服務（例如向計劃成員發出權益報表的頻密程度及每年可免費轉換基金的次數）；  
services of the trustees (e.g. frequency of issuance of benefit statement to scheme members; number of free fund switching per year);
- (b) 基金的收費（詳情請參閱積金局網站的收費比較平台，或可於積金局各辦事處免費索取《強積金基金收費比較平台摘要》）；  
fees and charges of the funds (for detailed information, please refer to the Fee Comparative Platform on the website of the MPFA or the Summary of Fee Comparative Platform on MPF Funds which can be obtained from the offices of the MPFA free of charge);
- (c) 計劃所提供的基金選擇範圍，尤須注意計劃有否提供切合你需要的基金選擇；及  
the range of fund choices offered by the schemes and in particular whether there are funds available that match what you need; and
- (d) 如你現時投資於強積金保證基金，則從該保證基金轉出權益可能導致你不符合部分或所有保證條件，從而影響你享有保證的資格。有關詳情請查閱原計劃的要約文件，或向原計劃的受託人查詢。  
if you are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that 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 Original Scheme or consult the trustee of Original Scheme for details.
- (8) 在決定把權益轉移至新計劃前，你應盡量瞭解新計劃的內容。有關新計劃的詳情，請查閱新計劃的要約文件。該文件可於新計劃受託人的網站下載，你也可聯絡新計劃的受託人索取有關文件。  
Before deciding to transfer benefits to New Scheme, you should try to understand as much as you can about New Scheme. Please check the information about New Scheme from the offering document of New Scheme, which can be found on the website of the trustee of New Scheme or contact the trustee of New Scheme.
- (9) 請確保你在新計劃下已持有強積金帳戶。否則，你必須在提交本表格之時或在此之前，向新計劃的受託人提交成員參加計劃表格。有關開立帳戶的程序及所需文件，請向新計劃的受託人查詢。  
Please ensure that you have an MPF account in New Scheme. Otherwise, you have to submit a membership enrolment form before or at the same time you submit this Form to the trustee of New Scheme. Please consult your trustee of New Scheme for the procedures and required documents for setting up an account.

- (10) 如欲把權益從一個計劃轉移至另一個計劃，請留意轉入帳戶的權益將會如何投資。一般而言，如你(a)沒有或尚未就有關帳戶向新計劃的受託人給予任何投資指示；或(b)已就有關帳戶給予投資指示，要求把權益按照預設投資策略投資，則轉入該帳戶的權益將按照預設投資策略投資。如有需要，請向新計劃的受託人查詢詳情。如欲就新計劃的帳戶更改或給予投資指示，亦請聯絡新計劃的受託人。
- If you wish to transfer your benefits from a scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy ("DIS") if you either (a) do not give or have not given any investment instructions for the account to the trustee of New scheme or (b) have given investment instructions for the account to invest benefits according to the DIS. Please approach the trustee of New Scheme to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in New Scheme, please also approach the trustee of New Scheme.
- (11) 如你已年滿或快將年滿 50 歲，而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，與接獲你的轉移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《強制性公積金計劃條例》規定的情況下，訂定處理降低風險及轉移權益的次序。如欲瞭解受託人如何處理該等交易，請向相關受託人查詢詳情。
- If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the 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 investment in the DIS and your transfer request take place at around the same time, the trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant trustee(s) if you wish to know the details of how the trustee(s) will handle these transactions.
- (12) 為免被第三者填上不正確的資料，**請勿在空白的表格上簽署**。在新計劃的受託人收到已填妥的選擇表格後，之前由受託人採取的行政步驟未必能夠撤銷。
- In order to prevent a third party from filling in incorrect information, please **DO NOT sign on a blank form**. After the completed election form has been received by the trustee of New Scheme, the administration procedures taken by the trustees may not be reversible.
- (13) 在你作出轉移選擇當日，你現有強積金帳戶顯示的基金單位數目，或會與贖回基金單位當日的數目有所不同。原計劃的受託人將在贖回日贖回你選擇從強積金帳戶轉出的各部分權益的所有基金單位，以及轉出贖回權益。新計劃的受託人會按照你的指示買入基金單位，過程中會出現一至兩個星期的「投資空檔」。在此期間，你的強積金權益不會投資於任何基金，假若這時基金價格因市場波動而出現變化，便有機會出現「低賣高買」的風險。
- The number of fund units shown in your current MPF account on the date you elect to transfer may be different from that as of the date on which the fund units are redeemed. The trustee of Original Scheme will redeem all the fund units from the part(s) of benefits in your MPF account that you elect to transfer out on the date of redemption and transfer out the redeemed benefits. The trustee of New Scheme will subscribe fund units in accordance with your instructions. There will be a time-lag of about one to two weeks, during which your MPF benefits will not be invested in any fund. During this period, fund prices may change due to market fluctuations, and there is a risk of a "sell low, buy high" scenario occurring.
- (14) 如你選擇將權益由中銀國際英國保誠信託有限公司作為受託人之集成信託計劃轉移至同一計劃的另一個帳戶，你所持有的基金單位將不會被贖回，並會直接轉移至你指定的帳戶內繼續投資。換言之，轉移過程並不涉及任何基金買賣。
- If you elect to transfer your benefits to another account within the same Master Trust Scheme whose trustee is the BOCI-Prudential Trustee Limited, the fund units held by you will not be redeemed and will be directly transferred to the account designated by you for continuous investment. That means there is no selling or buying of funds during the transfer process.
- (15) 有關選擇計劃時各項考慮因素及強積金投資的潛在風險，請參閱積金局網站（[www.mpfa.org.hk](http://www.mpfa.org.hk)）的相關宣傳刊物。
- Please refer to the MPFA's publication available from the MPFA website ([www.mpfa.org.hk](http://www.mpfa.org.hk)) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment.

## 查詢

### Enquiries

- (16) 計劃的要約文件載有該計劃的資料，這些資料將有助你決定是否把權益轉移至該計劃。如欲查詢帳戶詳情及個別計劃或基金的資料，請聯絡相關受託人。
- Information about a scheme is set out in the offering document of that scheme. This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the relevant trustees for enquiries about account details and information on specific schemes or funds.
- (17) 有關「僱員自選安排」的一般查詢，可聯絡相關受託人或積金局（電郵地址：[mpfa@mpfa.org.hk](mailto:mpfa@mpfa.org.hk) 或積金局熱線電話：2918 0102）。
- For general enquiries regarding the ECA, you may contact the relevant trustees or the MPFA (email: [mpfa@mpfa.org.hk](mailto:mpfa@mpfa.org.hk) or MPFA hotline: 2918 0102).



聲明：

本人確認在此提供的香港身份證/護照是原件的副本，而簽名是本人的簽名。

本人要求任何本人作為強制性公積金計劃（強積金）成員的信託人處理與這信件一同遞交的轉移申請。本人同意及明白在此提供的簽名將僅用於目前的轉移申請，而並不會更改任何本人過去曾經提供強積金信託人的簽名記錄。

Declaration：

I confirm that the Hong Kong Identity Card/Passport provided is a copy of the original and my signature is my own signature. I request the trustee of any Mandatory Provident Fund (MPF) schemes in which I am a member to process the transfer application(s) submitted together with this document. I agree and understand that my signature provided here would be used for the current application(s) only and would not change any of my signature record which I have provided to the MPF trustees previously.

請貼上香港身份證 / 護照副本

Please attach the Copy of HKID Card / Passport

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計劃成員簽署

Signature of the scheme member