



第MPF(S) - P(C)號表格

計劃成員整合個人帳戶申請表 (適用於整合多個個人帳戶至一個帳戶)

《強制性公積金計劃(一般)規例》(第485A章)第149條

填寫本表格前，請先閱讀下列**重要資料**：

SAMPLE 樣本

填寫表格

- (a) 本表格適用於整合多個個人帳戶至一個你選擇的帳戶。
- (b) 你必須同時填寫本表格(一頁)及附錄(一頁)，並把表格及附錄(合共兩頁)提交予你選擇的受託人，以及保留副本作日後參考。若你提供的任何資料(包括簽署)不正確或不完整，受託人可能無法迅速處理你的申請。
- (c) 你就此項轉移申請提供的個人資料，將用作處理你整合帳戶的申請。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)。
- (d) 「整合」多個個人帳戶一指從多個強積金個人帳戶轉移全部強積金累算權益(權益)至你選擇的強積金註冊計劃(計劃)的一個帳戶內。
- (e) 「供款帳戶」一指計劃下主要用以接收僱主為僱員所作出或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，或接收自僱人士所作出的強積金供款的帳戶。
- (f) 「個人帳戶」一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。

整合前注意事項

- (g) 請確保你在你選擇的計劃已開立個人帳戶或供款帳戶，以接收及整合你於附錄所指定擬轉移的個人帳戶內的權益。否則，你在提交本表格及附錄之時或在此之前，須先行向你選擇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，請向你選擇的受託人查詢。
- (h) 你藉本表格整合的每個個人帳戶內的所有權益，包括由自願性供款所產生的權益(如有的話，及在符合計劃管限規則的情況下)，將一筆過轉移至你選擇的計劃。
- (i) 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**。在你選擇的受託人收到已填妥的表格及附錄後，之前由受託人採取的行政步驟未必能夠撤銷。
- (j) 如你現時投資於強積金保證基金，從該保證基金轉出權益，可能會導致你不符合部分或所有保證條件，以致影響你享有保證的資格。詳情請查閱計劃的要約文件，或向你的受託人查詢。
- (k) 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(i)沒有或尚未就有關帳戶向你選擇的計劃的受託人給予任何投資指示；或(ii)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，請向你選擇的計劃的受託人查詢詳情。如欲就你選擇計劃的帳戶更改或給予投資指示，亦請聯絡你選擇的計劃的受託人。
- (l) 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。
- (m) 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)的相關宣傳刊物。

查詢

- (n) 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。
- (o) 有關整合帳戶的一般查詢，可聯絡相關受託人或積金局（電郵地址：mpfa@mpfa.org.hk或熱線電話：2918 0102）。

SAMPLE 樣本

第MPF(S) - P(C)號表格

計劃成員整合個人帳戶申請表
(適用於整合多個個人帳戶至一個帳戶)

SAMPLE 樣本

《強制性公積金計劃(一般)規例》(第485A章)第149條

第 I 部：計劃成員資料				
姓名 ^{註1} (與你的香港身分證上的姓名相同)	姓氏： 李			
	名字： 智能			
身分證明	香港身分證號碼： C668668(E)			
	護照號碼： (本欄僅供沒有香港身分證的計劃成員填寫)			
聯絡資料	日間聯絡電話號碼： 2234-6789		手提電話號碼： 9000-0000	
	電郵地址(如有)： leechinan@yahoo.com.hk			
通訊地址	中國香港 國家/地區		香港/九龍/新界 (請刪去不適用者)	
	銅鑼灣安樂街 區/街道		50 號 街道號碼	屋邨
	安樂大廈 大廈		A 座	10 樓層 B 室

第 II 部：我選擇的計劃	
本人選擇把在附錄中指定的個人帳戶內的所有強積金累算權益(權益)轉移至以下我選擇的計劃 ^{註2} ：	
本人選擇的計劃名稱	BOC-PRUDENTIAL EASY-CHOICE MPF SCHEME
帳戶類別 (只可選擇一項，請於適當方格內填上✓號)	<input checked="" type="checkbox"/> 個人帳戶 或 <input type="checkbox"/> 供款帳戶(僱主識別號碼 ^{註3} ：)
計劃成員帳戶號碼 ^{註4}	00012345678

第 III 部：授權及聲明	
<p>(a) 本人同意，本人選擇的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。</p> <p>(b) 本人謹此指示在附錄中指定的受託人，在把本人於附錄中指定的個人帳戶內的所有權益轉移至本人選擇的計劃後，以及在該等帳戶內並無剩餘款項的情況下，終止該等個人帳戶。</p> <p>(c) 本人聲明，本人已閱讀及明白本表格第1頁至第2頁的資料及註釋的內容，而盡本人所知所信，本表格及附錄所提供的資料均屬正確無訛且並無缺漏。</p>	
簽署 ^{註5} Lee Chi Nan	2023 / 11 / 29 日期(年/月/日)

SAMPLE 樣本

附錄：本人選擇整合的個人帳戶列表		
請於下表選出你選擇整合的個人帳戶，並填寫計劃成員帳戶號碼 ^{註5} ：		
受託人名稱	計劃名稱	計劃成員帳戶號碼
友邦（信託）有限公司	友邦強積金優選計劃	
銀聯信託有限公司	AMTD 強積金計劃	
	BCT（強積金）行業計劃	
	BCT 積金之選	
	BCT 強積金策略計劃	
	宏利退休精選（強積金）計劃	
交通銀行信託有限公司	交通銀行愉盈退休強積金計劃	
東亞銀行（信託）有限公司	東亞（強積金）行業計劃	
	東亞（強積金）集成信託計劃	
	東亞（強積金）享惠計劃	
中銀國際英國保誠信託有限公司	中銀保誠簡易強積金計劃	
	我的強積金計劃	
中國人壽信託有限公司	中國人壽強積金集成信託計劃	
HSBC Provident Fund Trustee (Hong Kong) Limited	富達退休集成信託	23456789
	海通 MPF 退休金	
	恒生強積金智選計劃	
	滙豐強積金智選計劃	98765432
宏利公積金信託有限公司	宏利環球精選（強積金）計劃	
信安信託（亞洲）有限公司	信安強積金計劃 800 系列	
	信安強積金-易富之選	
	信安強積金-明智之選	
永明信託有限公司	永明彩虹強積金計劃	12345678
萬通信託有限公司	萬全強制性公積金計劃	

上表列出截至 2023 年 11 月 29 日的受託人及計劃資料

只供中介人使用

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

SAMPLE 樣本

1. 如你沒有香港身分證，請填上你在護照上的姓名。
2. 如你沒有提供你選擇的計劃的名稱或計劃成員帳戶號碼，或所提供的資料有誤，你整合個人帳戶的申請或不獲處理。你可查閱參與通知、成員證明書或接納通知（視乎情況而定）或周年權益報表獲取有關資料。如有疑問，請聯絡有關受託人。

請注意，只有你在附錄中指定的個人帳戶才會整合。附錄內沒有指定的個人帳戶將維持不變。
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。
4. 如你最近才參加計劃，並未獲悉你的計劃成員帳戶號碼，則可留空此項。如有疑問，請聯絡相關受託人。
5. 在下列情況下，你要求整合附錄列明的某個個人帳戶的申請可能不獲處理：
 - (a) 你沒有填寫該個人帳戶的計劃成員帳戶號碼，或所填寫的號碼不正確；或
 - (b) 你在表格上的簽署與你之前給予該受託人的簽署式樣不符。

不過，如其他個人帳戶的計劃成員帳戶號碼及簽名式樣均正確，整合該等帳戶的申請將獲處理。

你可查閱參與通知、成員證明書或接納通知（視乎情況而定）或周年權益報表獲取你的計劃成員帳戶號碼。如有疑問，請聯絡有關受託人。

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

Lee Chi Nan

計劃成員簽署

Signature of the scheme member



FORM MPF(S) - P(C)

SCHEME MEMBER'S REQUEST FOR ACCOUNT CONSOLIDATION FORM (for consolidating multiple personal accounts into one account)

Section 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)

SAMPLE

Please read the following important notes before completing this Form.

Filling In This Form

- (a) This Form is to be used for consolidating multiple personal accounts into one account of your election.
- (b) You must fill in both this Form (one page) and the Appendix (one page) and submit them (two pages in total) to your elected trustee and keep a copy for your future reference. If any information provided, including your signature, is incorrect or incomplete, the trustees may not be able to process your request promptly.
- (c) The personal data to be supplied in support of this election of transfer are to be used for processing your request for account consolidation. 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).
- (d) "Consolidation" and "consolidating" of multiple personal accounts refers to transferring all MPF accrued benefits (benefits) from several MPF personal accounts to an account under your elected MPF registered scheme (scheme).
- (e) "Contribution account" - an account in a scheme which is mainly used to receive MPF contributions (both employer and employee portions) made by an employer for or on behalf of the employee or MPF contributions made by a self-employed person.
- (f) "Personal account" - an account in a scheme which is mainly used to receive the benefits transferred from other contribution or personal account(s).

Reminders Before Consolidating

- (g) Please ensure that you have a personal account or a contribution account in your elected scheme to which the benefits in your personal accounts indicated in the Appendix are to be transferred and consolidated. Otherwise, you have to submit a membership enrollment form before or at the same time you submit this Form and the Appendix to your elected trustee. Please consult your elected trustee for the procedures and required documents for setting up an account.
- (h) For each of your personal accounts to be consolidated using this Form, the entirety of your benefits in the account, including voluntary contributions (if any and subject to the governing rules of the scheme), will be transferred to your elected scheme in a lump sum.
- (i) In order to prevent a third party from filling in incorrect information, please **DO NOT sign on a blank form**. After the completed Form and Appendix have been received by your elected trustee, the administration procedures taken by the trustees may not be reversible.
- (j) 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 the scheme(s) or consult your trustee(s) for details.
- (k) If you wish to transfer your benefits from one 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 (i) do not give or have not given any investment instructions for the account to the trustee of your elected scheme or (ii) have given investment instructions for the account to invest benefits according to the DIS. Please approach the trustee of the elected scheme to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in the elected scheme, please also approach the trustee of the elected scheme.
- (l) 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.

- (m) Please refer to the MPFA's publications available from the MPFA website (www.mpfa.org.hk) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment.

SAMPLE**Enquiries**

- (n) 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.
- (o) For general enquiries regarding account consolidation, you may contact the relevant trustees or the MPFA (email: **mpfa@mpfa.org.hk** or hotline: **2918 0102**).

Please use BLOCK LETTERS to complete this Form.

FORM MPF(S) - P(C)

SCHEME MEMBER'S REQUEST FOR ACCOUNT CONSOLIDATION FORM
(for consolidating multiple personal accounts into one account)

Section 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)

SAMPLE

SECTION I. SCHEME MEMBER DETAILS				
Name¹ (as shown on your Hong Kong Identity (HKID) Card)	Surname: LEE			
	Other Name: CHI NAN			
Identification	HKID Card No.: C668668(E)			
	Passport No.: (<i>ONLY for scheme member without HKID Card</i>)			
Contact Details	Daytime Phone No.: 2234-6789		Mobile Phone No.: 9000-0000	
	Email Address (if any): leechinan@yahoo.com.hk			
Correspondence Address	A	10	B	On Lok Building
	Flat/Room	Floor	Block	Building
	Estate		5	On Lok Street Causeway Bay
			Street No.	Street / District
	Hong Kong / Kowloon / New Territories		Hong Kong China	
	(delete whichever is inappropriate)		Region / Country	

SECTION II. MY ELECTED SCHEME	
I elect to transfer all MPF accrued benefits (benefits) from my personal accounts indicated in the <u>Appendix</u> to my elected scheme ² :	
Name of My Elected Scheme	BOC-PRUDENTIAL EASY-CHOICE MPF SCHEME
Account Type (Select one only and ✓ as appropriate)	<input checked="" type="checkbox"/> Personal account OR <input type="checkbox"/> Contribution account (Employer Identification No. ³ :)
Scheme Member Account No.⁴	00012345678

SECTION III. AUTHORIZATION AND DECLARATION	
<p>(a) I hereby give consent to the trustee of my elected 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.</p> <p>(b) I hereby give the trustee(s) indicated in the Appendix an instruction to terminate my relevant personal accounts as referred to in the Appendix upon transfer of the full benefits to my elected scheme and there is no residual balance in the said accounts.</p> <p>(c) I declare that I have read and understood the Notes on pages 1 to 2 of this Form and the Explanatory Notes and to the best of my knowledge and belief, the information given in this Form and the Appendix is correct and complete.</p>	
Signature ⁵ Lee Chi Nan	Date (DD/MM/YYYY) 29/11/2023

APPENDIX. LIST OF MY PERSONAL ACCOUNTS FOR CONSOLIDATION

SAMPLE 樣本

Please indicate the personal accounts you elect to consolidate by filling in the Scheme Member Account No.:

Trustee Name	Scheme Name	Scheme Member Account No.
AIA Company (Trustee) Limited	AIA MPF - Prime Value Choice	
Bank Consortium Trust Company Limited	AMTD MPF Scheme	
	BCT (MPF) Industry Choice	
	BCT (MPF) Pro Choice	
	BCT Strategic MPF Scheme	
	Manulife RetireChoice (MPF) Scheme	
Bank of Communications Trustee Limited	BCOM Joyful Retirement MPF Scheme	
Bank of East Asia (Trustees) Limited	BEA (MPF) Industry Scheme	
	BEA (MPF) Master Trust Scheme	
	BEA (MPF) Value Scheme	
BOCI-Prudential Trustee Limited	BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme	
	My Choice Mandatory Provident Fund Scheme	
China Life Trustees Limited	China Life MPF Master Trust Scheme	
HSBC Provident Fund Trustee (Hong Kong) Limited	Fidelity Retirement Master Trust	23456789
	Haitong MPF Retirement Fund	
	Hang Seng Mandatory Provident Fund - SuperTrust Plus	
	HSBC Mandatory Provident Fund - SuperTrust Plus	98765432
Manulife Provident Funds Trust Company Limited	Manulife Global Select (MPF) Scheme	
Principal Trust Company (Asia) Limited	Principal MPF Scheme Series 800	
	Principal MPF - Simple Plan	
	Principal MPF - Smart Plan	
Sun Life Trustee Company Limited	Sun Life Rainbow MPF Scheme	12345678
YF Life Trustees Limited	MASS Mandatory Provident Fund Scheme	

Please fill-in the Previous Scheme Member Account No.

The trustees and schemes listed above are as of: 29 November 2023

For intermediaries use only

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

SAMPLE 樣本**Explanatory Notes**

1. If you do NOT possess a HKID Card, please fill in your name as shown on your passport.
2. Your request for consolidating personal accounts may not be processed if the name of your elected scheme or your scheme member account number of that scheme is not provided or is incorrect. The information can be found in your notice of participation or, as the case may be, membership certificate, notice of acceptance, or annual benefit statement. If you are in doubt, please contact the relevant trustee.

Please note that only the personal accounts you have elected in the Appendix will be consolidated. Those that you have not elected in the Appendix will not be consolidated.

3. 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 trustees. If you are in doubt, please contact your trustee or your employer.
4. You may leave the scheme member account number blank if you have recently enrolled in the scheme and have not been notified of the scheme member account number. If you are in doubt, please contact the relevant trustee.
5. Your request for consolidating a particular personal account listed in the Appendix may not be processed if:
 - a. your scheme member account number of that personal account is not provided or is incorrect; or
 - b. the signature in this Form does not match the specimen signature previously given to that particular trustee.

However, consolidation will proceed for other personal accounts where the scheme member account number and signature are correct.

Your scheme member account number can be found in your notice of participation or, as the case may be, membership certificate, notice of acceptance, or annual benefit statement. If you are in doubt, please contact the relevant trustee(s).

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.



Lee Chi Nan

計劃成員簽署

Signature of the scheme member