



**BOCPT My Choice e-Onboarding  
MPF Mobile App  
User Manual**

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# Please note the following before using eForm app:



1. eForm app supports iOS and Android mobile devices.
2. We recommend your mobile device should have at least **4GB RAM with 2GB free memory** when using the app. Otherwise, you may face problems when using the app. Please close other applications that you do not need to use temporarily before using the app to make it work more smoothly.
3. The app now supports iOS version 14 and 15, and Android version 12 and 13. You can go to Settings > General to check the version.

# 1 Download and log into the eForm application

Search “BOCPT My Choice e-Onboarding” on App Store or Google Play to download and install eForm app.

App Store Preview



過濾

中銀保誠我的強積金 e-onboarding



OR

Scan QR code to download the app



iOS



Android

After downloading, click “Open” to start the app.



## Prepare client application documents



1. Permanent HKID card of the client
2. Residential Address proof **(Not applicable to fund transfer form application)**
  - Latest residential address proof showing client's name issued within the last 3 months (e.g. utility bill, bank or credit card statement)
3. Proof of participating in other MPF Scheme/ ORSO scheme **(applicable to Tax Deductible Voluntary Contribution (TVC) application only)**
  - Documents evidencing client's current or historical participation of any registered MPF scheme or ORSO scheme (e.g. membership certificate, notice of participation or annual benefit statement)

## Open the eForm application

If you open eForm app for the first time, you are asked for permission to allow the app to take photos and access photos on your device. Please grant the relevant permission to continue.



**My Choice - TVC Application...** NEXT

**Personal Information**

Please scan HKID by clicking the camera button on the right. Please note: only scan an ORIGINAL copy of HKID card.

English Name

Chinese Name

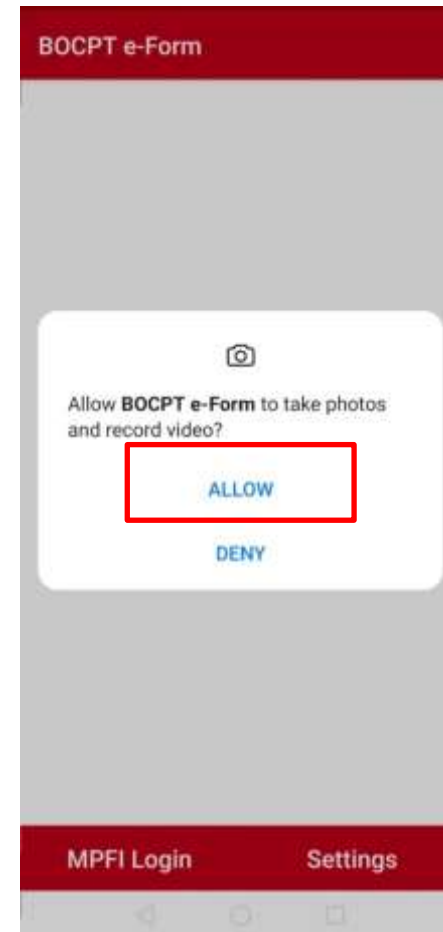
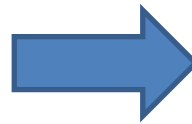
HKID

Sex

Male Female

Birthday

YYYY / MM / DD

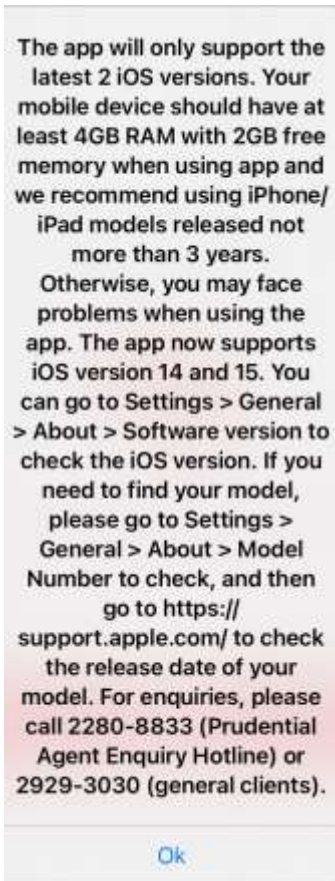


## Open the eForm application

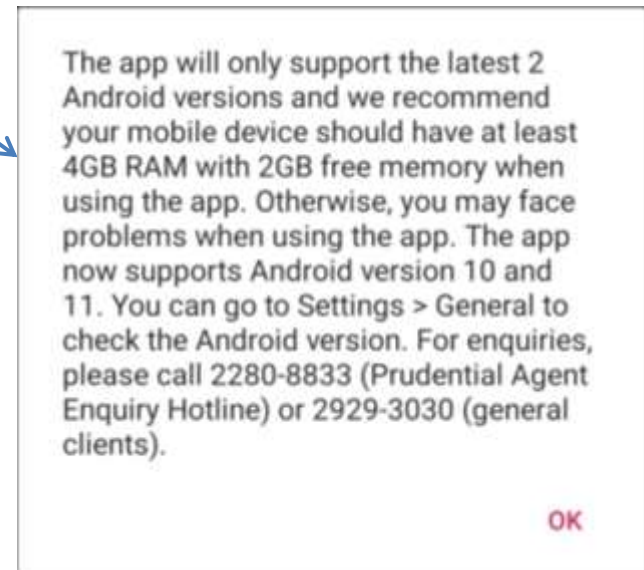
A prompt message will appear after opening the application. Please read the message carefully and click "OK" to continue.

**Note:** Please close other applications that you do not need to use temporarily before using the app to make it work more smoothly.

iOS



Android





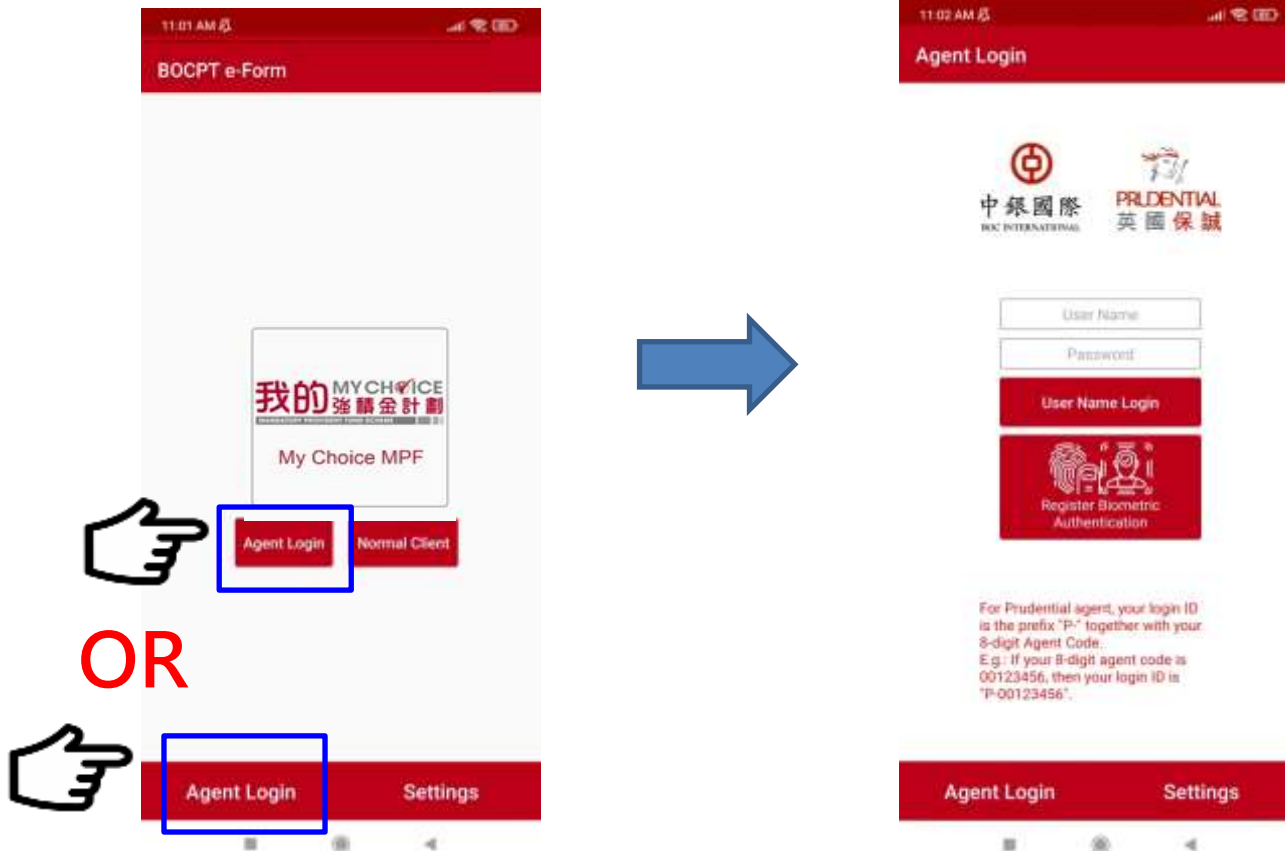
## Normal Client Login

- After enter login page, **please click “Normal Client”**, and then select the applicable form from the list.



## MPFI Login

- **Prudential Agent** after enter login page, **please click “Agent Login”**.
- Prudential financial advisors **must have logged into the MPFI portal on [BOCI-Prudential Trustee’s website](#)** before they can log into eForm app. Please [click here](#) to refer to the user guide for intermediary login.



## Prudential Agent

## First time login

1. Please go to MPFI portal at [BOCI-Prudential Trustee's website](https://www.bocpt.com/english/agent/login.aspx)  
<https://www.bocpt.com/english/agent/login.aspx>.
2. Please input your login ID. **The format of the login ID is "P-" and the 8-digit agent code.**  
E.g. if your 8-digit agent code is 00123456, then your login ID is "P-00123456".
3. Please input your Prudential email address & "verification code" as shown on screen, then click "confirm".

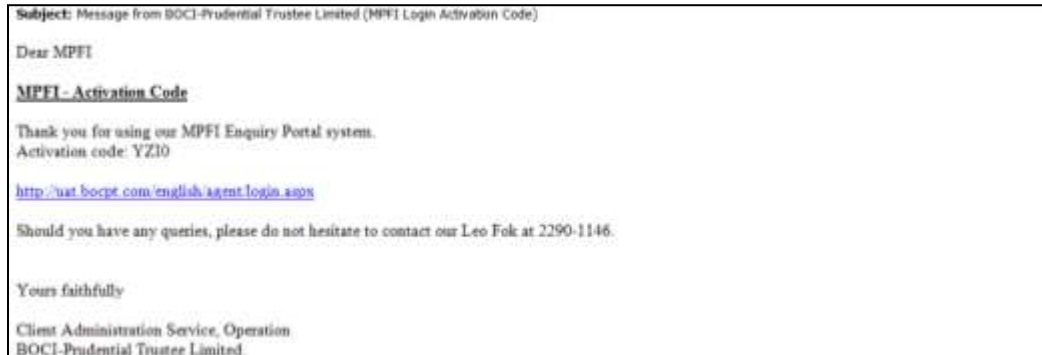
The screenshot shows a web form titled "Online Authentication". It contains the following elements:

- A header bar with the text "Online Authentication".
- A label: "Please enter your company email address:"
- A text input field for the email address, circled with a blue circle and the number "1".
- A label: "Please enter the verification code below:"
- A verification code display area showing "T308" with a "Re-generate" button below it, circled with a blue circle and the number "2".
- A text input field for the verification code.
- Two buttons at the bottom: "Confirm" and "Reset".
- A link at the bottom right: "> Re-enter Login ID".

## Prudential Agent

## First time login (Cont'd)

## 4. Input one-time activation code (send to your Prudential email address).



## 5. Please set your own password.

Notes: password must have 6 to 15 characters and contain at least one alphabet (case sensitive) and one number.

**MPFI Enquiry Portal**

**Activate Your Account**

Email Address: WY.chen@bocpt.com

Please check your email to get the activation code

Activation Code:

New PIN\*

Confirm New PIN:

\* The PIN is case sensitive and requires 6-15 characters, including numeral and alphabet.

Confirm Reset

> Resend Activation Code > Re-enter Login ID

E.g. new password: A132456

Re-enter password: A132456

## Prudential Agent **Forgot Password**

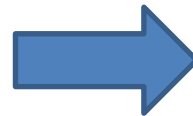
1. Please go to MPFI portal at BOCI-Prudential Trustee's website  
<https://www.bocpt.com/english/agent/login.aspx>.
2. Please input your login ID. **The format of login ID is "P-" and the 8-digit agent code.**  
E.g. if your 8-digit agent code is 00123456, then your login ID is "P-00123456".
3. Please press "Forgot PIN".
4. Please input your Prudential email address & "verification code" as shown on screen, then click "confirm".

Login ID:

PIN:

**Login** **Reset**

**> Forgot PIN?** **> Re-enter Login ID**



**Online Authentication**

Please enter your company email address:

Please enter the verification code below:

**7308**

**Re-generate**

**Confirm** **Reset**

**> Re-enter Login ID**

5. Repeat "First time login" steps 4 and 5 to reset password.

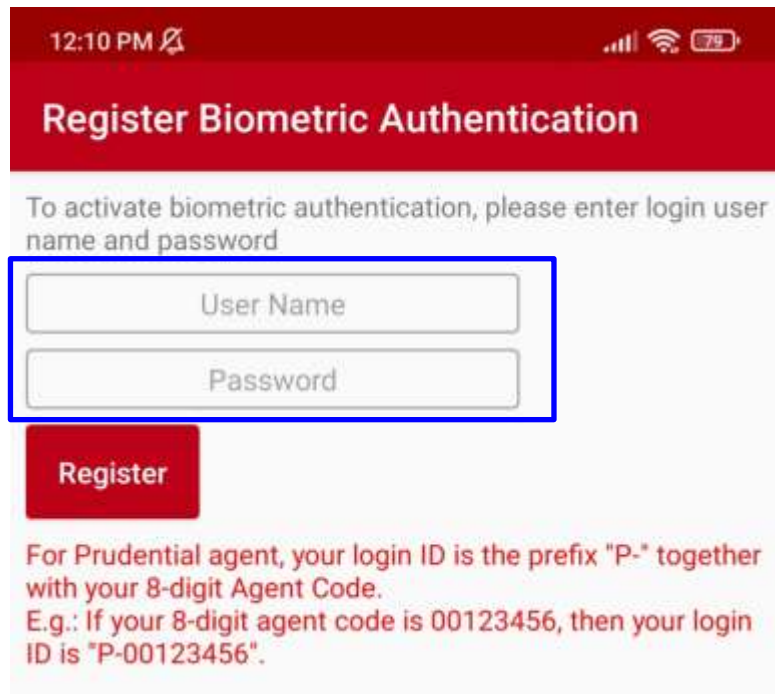
## MPFI Login

**Prudential Agent** You can log into eForm app by entering user name or using biometric authentication. If you log in with an user name, please use the same client name and password of the MPFI portal of BOCI-Prudential Trustee Limited. **The format of the user name is "P-" and the 8-digit agent code.** Please click "Username Login" button after inputting the number. If you use biometric authentication on this app for the first time, please register first.

The image displays two screenshots from the eForm application. The left screenshot, titled "Agent Login", shows a login screen with fields for "User Name" and "Password", a "User Name Login" button, and a "Register Biometric Authentication" button. A blue box highlights the login fields, with an arrow pointing to the text "Input user name and password". Another blue box highlights the "Register Biometric Authentication" button, with an arrow pointing to the text "Register to use biometric authentication". Below the login screen, a note states: "For Prudential agent, your login ID is the prefix 'P-' together with your 8-digit Agent Code. E.g.: If your 8-digit agent code is 00123456, then your login ID is 'P-00123456'". The right screenshot, titled "Register Biometric Authentication", shows a registration screen with fields for "User Name" and "Password", and a "Register" button. A blue box highlights the "Register" button, with an arrow pointing from the "Register Biometric Authentication" button in the left screenshot. Below the registration screen, a note states: "For Prudential agent, your login ID is the prefix 'P-' together with your 8-digit Agent Code. E.g.: If your 8-digit agent code is 00123456, then your login ID is 'P-00123456'".

## Register to use biometric authentication

When registering for biometric authentication, please input the same user name and password of the MPFI portal of BOCI-Prudential Trustee Limited. **The format of the user name is "P-" and the 8-digit Prudential agent code.** After inputting, please press the "register" button. When you use biometric authentication to login in the future, the biometric authentication data of the login person will be checked according to the biometric authentication record (fingerprint or face recognition) on your mobile device.



12:10 PM

### Register Biometric Authentication

To activate biometric authentication, please enter login user name and password

**Register**

For Prudential agent, your login ID is the prefix "P-" together with your 8-digit Agent Code.  
E.g.: If your 8-digit agent code is 00123456, then your login ID is "P-00123456".



12:17 PM

### Agent Login

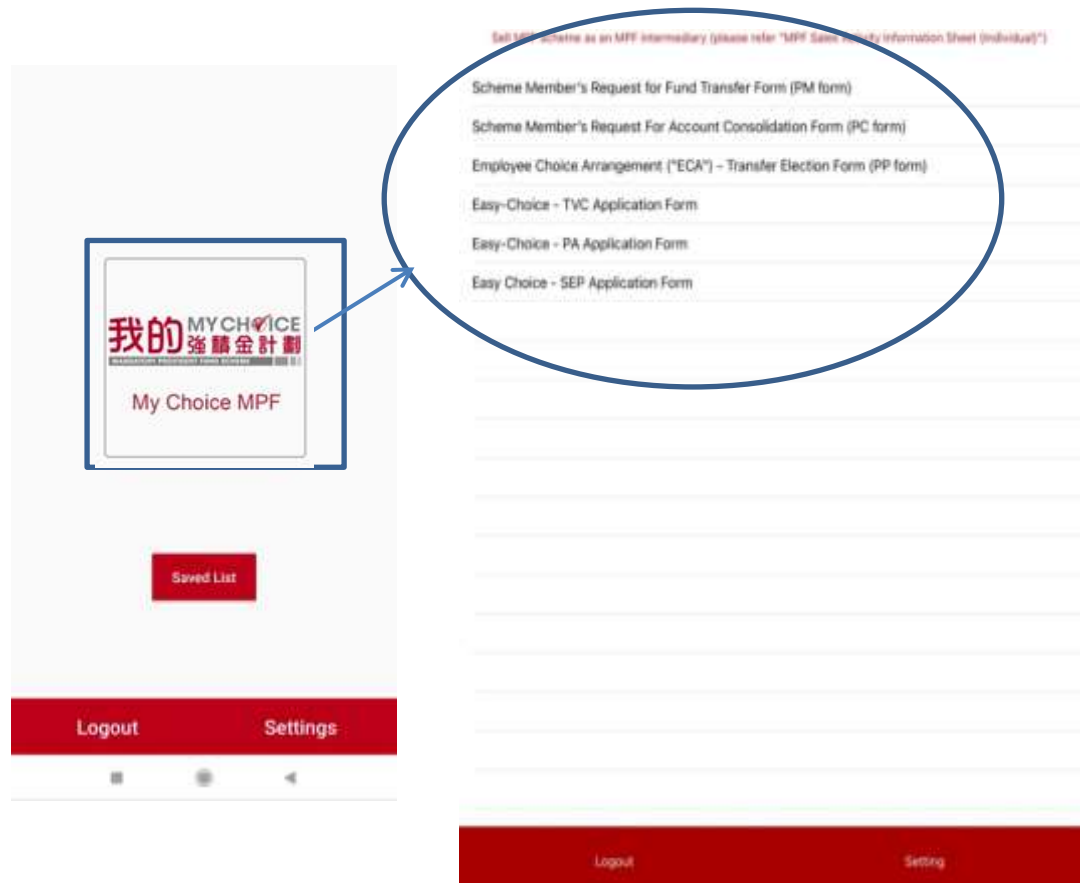
中銀國際 BOC INTERNATIONAL PRUDENTIAL 英國保誠

**User Name Login**

**Use Biometric Authentication Login**

## MPFI Login Page

- Please read the welcome message carefully after log in and click “OK”.
- Click “My Choice MPF Scheme” icon, and then select the applicable form from the list.





## Fill in personal information

- For **normal client**, please press “Camera” icon at the upper right hand corner of “Personal Information” to capture personal information from a Hong Kong Permanent Identity Card (HKID) via [Optical Character Recognition \(OCR\) function](#).  
Note: cannot use OCR to scan a non-permanent HKID card or passport
- System will read and populate personal information on the form automatically.

**Personal Information**

Step 1 of 10 ● ○ ○ ○ ○ ○ ○ ○ ○ ○ ○

Please scan HKID by clicking the camera button on the right.  
Please note: only scan a ORIGINAL copy of HKID card.

English name  
as shown on your Hong Kong Identity (HKID) Card

Surname \* required

Other Name \* required

Chinese name

HKID / Passport No. \* required ?  
 HKID  Passport No.

Nationality (Country / Region) \* required

Sex \* required Male Female

Birthday \* required ?  
YYYY / MM / DD

Use OCR to capture personal information

Select nationality

## Fill in personal information

- Prudential Agent** please press “Camera” icon at the upper right hand corner of “Personal Information” to capture personal information from a Hong Kong Permanent Identity Card (HKID) via [Optical Character Recognition \(OCR\) function](#); or [manual input](#) personal information.
 

Note: cannot use OCR to scan a non-permanent HKID card or passport
- System will read and populate personal information on the form automatically.
- MPFI can fill out and save client’s information in the app first, and scan supporting documents during meeting with clients later.

**Personal Information**

Step 1 of 10 ● ○ ○ ○ ○ ○ ○ ○ ○ ○ ○

Please scan HKID by clicking the camera button on the right.  
Please note: only scan a ORIGINAL copy of HKID card.

English name

**OR**

Manual input personal information

Select nationality

Use OCR to capture personal information

Surname \* required

Other Name \* required

Chinese name

HKID / Passport No. \* required ?

HKID  Passport No.

Nationality (Country / Region) \* required

Sex \* required Birthday \* required ?

Male Female YYYY / MM / DD

## Check out instructions

- When you input information of the form, you may have enquiry about a field. Please click the “?” icon next to the field to read the instruction.

**Personal Information**

Step 1 of 10 ● ● ● ● ● ● ● ● ● ●

Please scan HKID by clicking the camera button on the right.  
Please note: only scan a ORIGINAL copy of HKID card.

**English name**  
as shown on your Hong Kong Identity (HKID) Card

**Surname** \* required

Surname

**Other Name** \* required

Other Name

**Chinese name**

Chinese name

**HKID / Passport No.** \* required

HKID  Pa

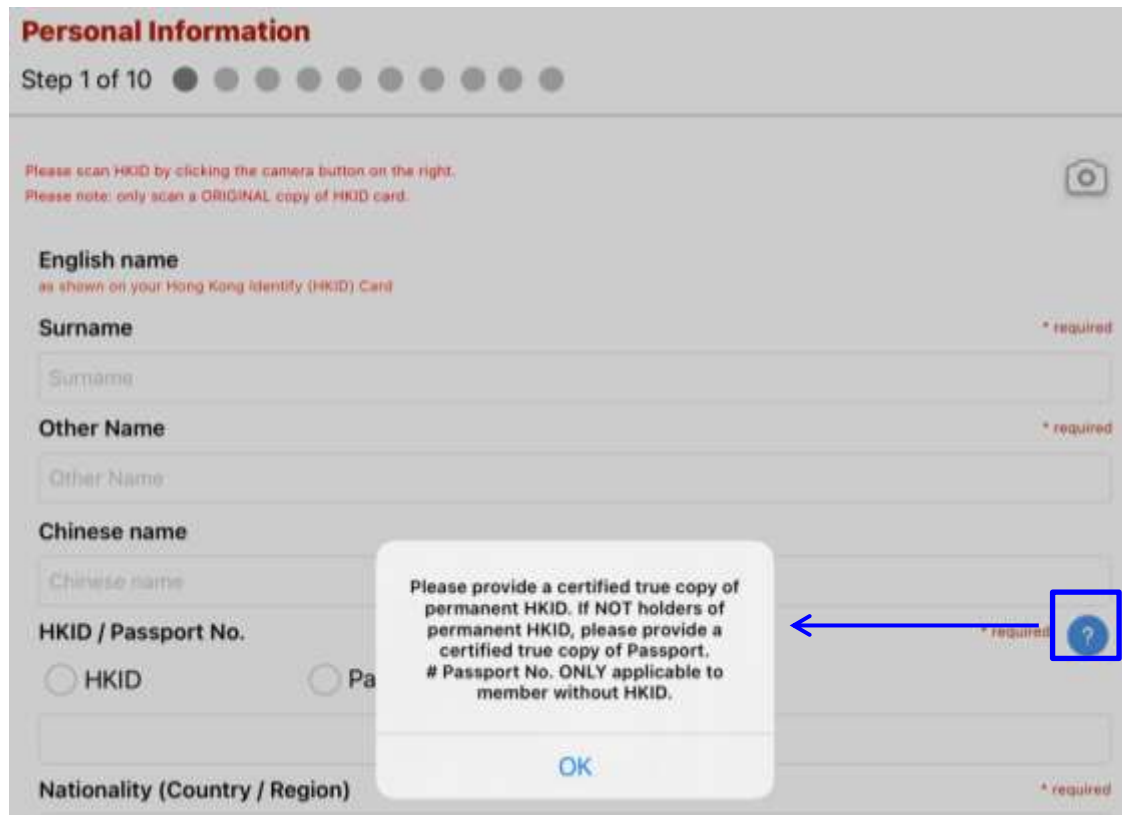
HKID / Passport No.

**Nationality (Country / Region)** \* required

Nationality (Country / Region)

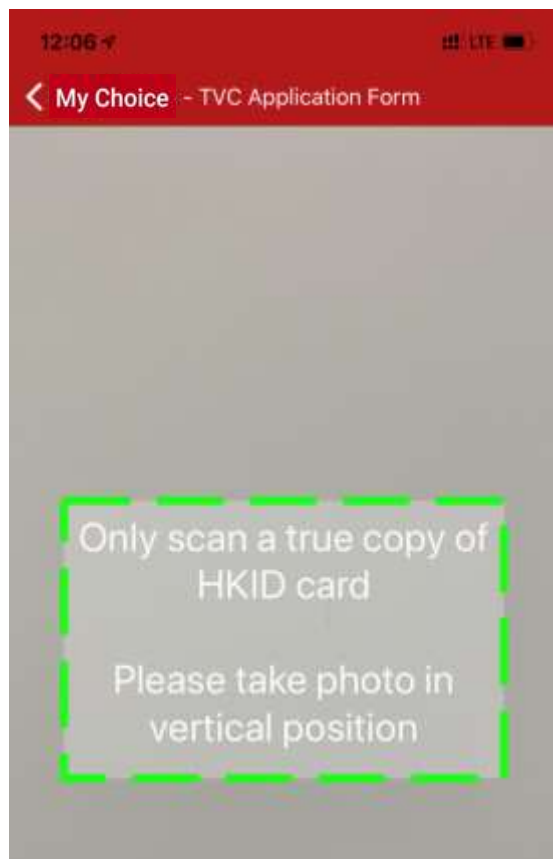
Please provide a certified true copy of permanent HKID. If NOT holders of permanent HKID, please provide a certified true copy of Passport. # Passport No. ONLY applicable to member without HKID.

OK

The image shows a mobile application interface for entering personal information. At the top, it says 'Personal Information' and 'Step 1 of 10'. Below this, there are instructions to scan an HKID card. The form has several input fields: 'English name' (with a sub-note 'as shown on your Hong Kong Identity (HKID) Card'), 'Surname', 'Other Name', 'Chinese name', 'HKID / Passport No.', and 'Nationality (Country / Region)'. Each of the last four fields has a red asterisk and the word 'required' next to it. A modal dialog box is overlaid on the form, containing instructions about providing a certified true copy of either a permanent HKID or a passport. A blue question mark icon is located to the right of the 'HKID / Passport No.' field, and a blue arrow points from this icon to the modal dialog box.

## Use OCR to scan HKID card

- You must take photo in **vertical position** and place the four sides of the HKID card close to the camera shooting box during scanning. After read information from HKID card, system will move to next step immediately.
- Please read the [Tips for using OCR](#) in Appendix.



### Personal Information

Step 1 of 6

Please scan HKID by clicking the camera button on the right.  
Please note: only scan a ORIGINAL, size of HKID card.



#### English name

(as shown on your Hong Kong Identity (HKID) Card)

#### Surname

\* required

SAN

#### Other Name

\* required

Chi Nan

#### Chinese name

申智蓮

#### HKID / Passport No.

\* required

HKID

Passport No.

C668668(E)

#### Nationality (Country / Region)

\* required

#### Sex

\* required

#### Birthday

\* required

Male

Female

1988 / 01 / 01

## Use OCR to scan HKID card

After taking photo of HKID card, you can press “Preview” button at bottom right corner to preview the image. If the captured image is unclear or incomplete, please press the return button in the upper left corner to return to the previous page, and then re-shoot the HKID card.



**Personal Information**

Please scan HKID by clicking the camera button on the right. Please note: only scan a ORIGINAL copy of HKID card.

English name  
SAN Chi Nan

Chinese name  
申智能

HKID  
C668668(E)

Sex  
Male Female

Birthday  
1988 / 01 / 01

Preview





## Check personal information

After input personal information, please check carefully and correct it if needed.

Note: Personal information filled out here will be automatically filled in all relevant fields on application form. Please check carefully to ensure data correctness.

**Personal Information**

Step 1 of 6  ← Progress bar is shown on the upper left hand corner

Please scan HKID by clicking the camera button on the right.  
Please note: only scan a ORIGINAL copy of HKID card. 

**English name**  
as shown on your Hong Kong Identity (HKID) Card

**Surname** \* required  
SAN

**Other Name** \* required  
Chi Nan

**Chinese name**  
申智能

**HKID / Passport No.** \* required ?  
 HKID  Passport No.  
C668668(E)

**Nationality (Country / Region)** \* required  
Please select Nationality after scan HKID card

**Sex** \* required **Birthday** \* required ?  
Male Female 1988 / 01 / 01

Preview

## Fill in address information

Click the camera icon at the top right hand corner at “Address” section, and scan your address image into it with **optical character recognition (OCR)**; or **manual input** the address information.

**Note:** OCR function for address proof is disabled when you are filling fund transfer forms. You may skip this step directly.

### Address

Please scan address proof by clicking the camera button on the right (not applicable to PM, PC, PP form)  
Reminder: A valid residential address proof (e.g. utility bill, bank statement) should show your name clearly and issued within the last 3 months

\* required



Use OCR to capture address details

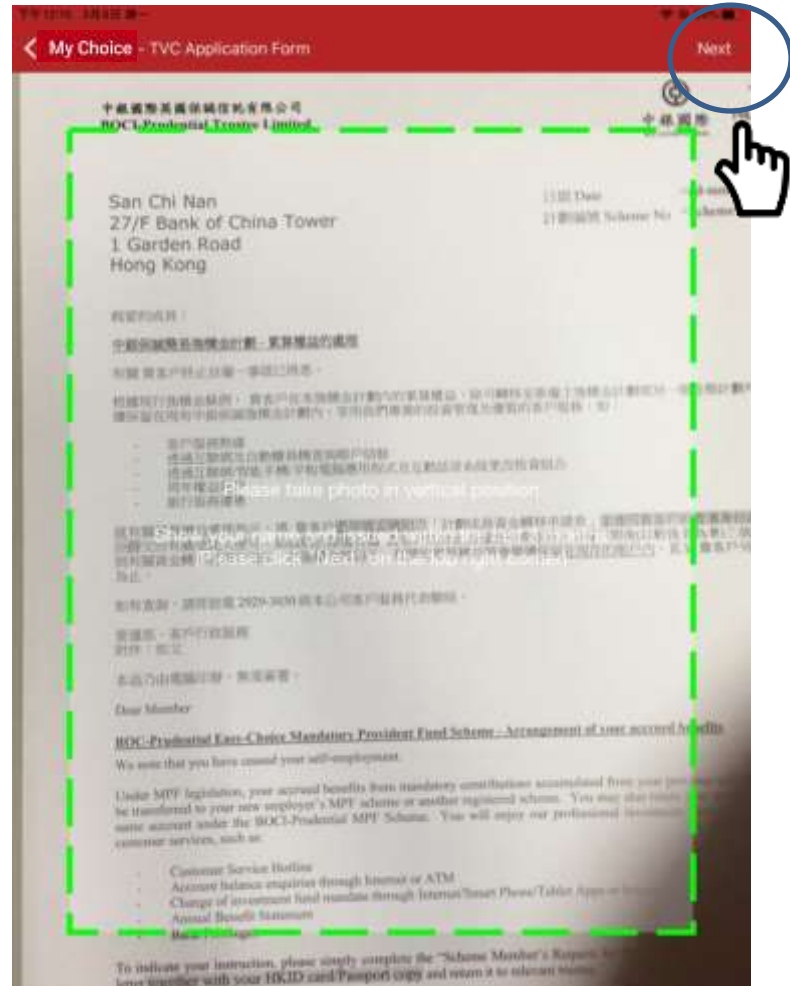
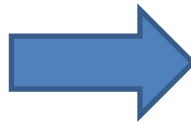
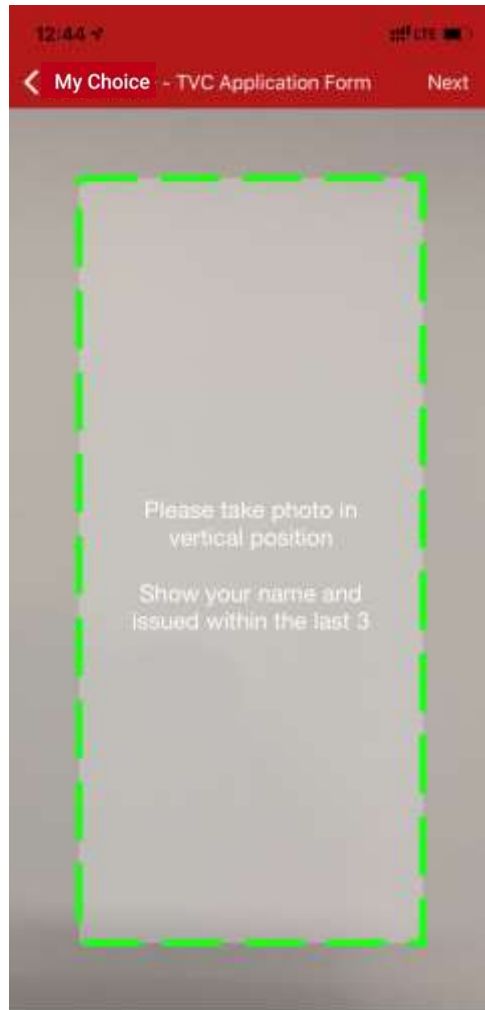
Flat / Room	Floor	Block
2403	24	Block
Name of Building / Estate		
CiticorpCentre		
Street No.	Name of Street	
18	Whitfield Road	
District	Area	
Causeway Bay	<input type="radio"/> HK <input type="radio"/> KLN <input type="radio"/> NT <input type="radio"/> Oversea	

**OR**

Manual input address details

## Use OCR function to capture address information

After opening the camera, align the camera shooting box with the address information on the address proof document. You can zoom in to enlarge the address information if necessary. Click "Next" when completed.






## Use OCR function to scan address information

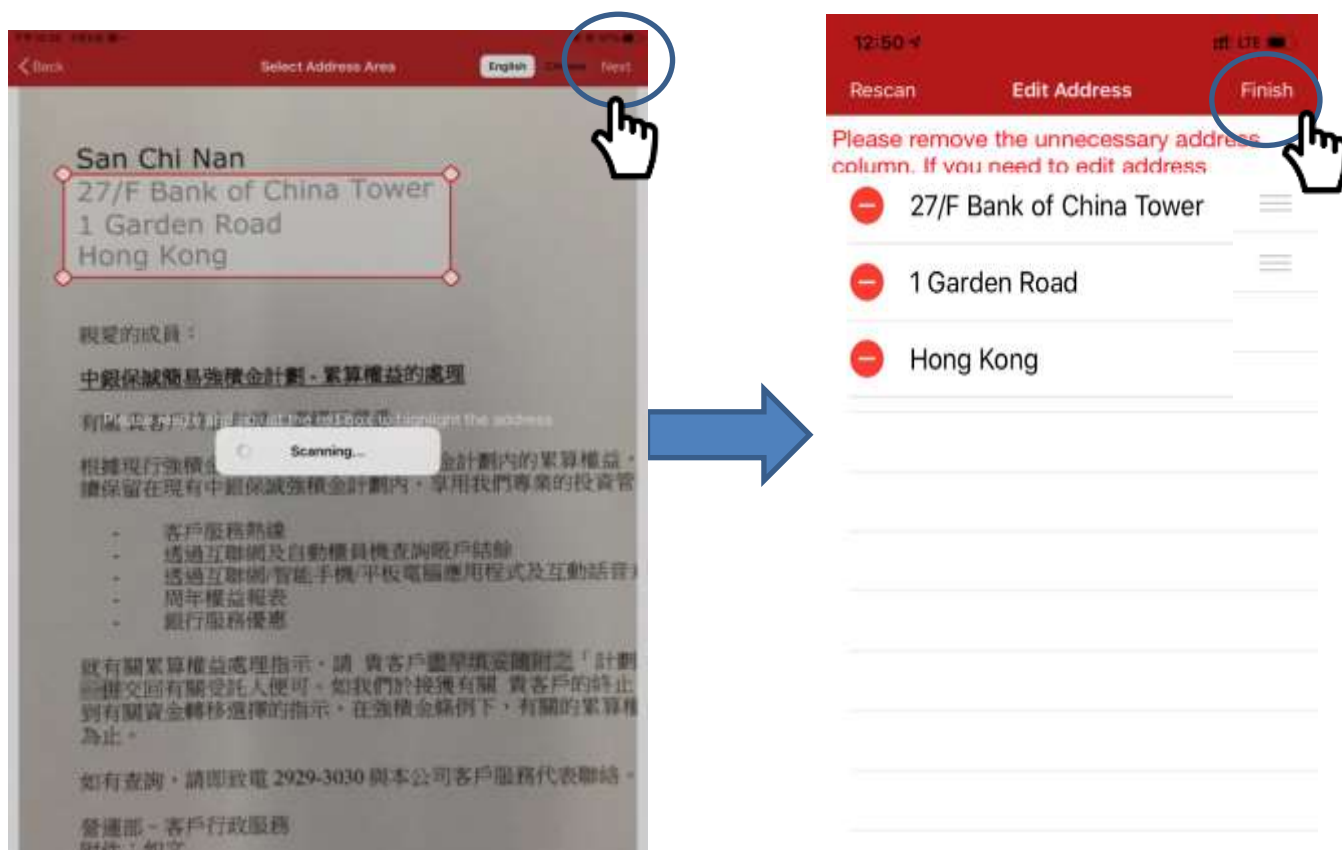
According to the language of your address to be scanned, please select “English” or “Chinese”, and adjust the size of the red box to cover all of your scanning address (exclude recipient name), and then click "Next".



## Use OCR function to scan address information

System will read address information by Optical Character Recognition (OCR) function. Review the address column and click  icon to delete the unnecessary address line. Press “Finish” to continue.

**Note:** If you need to change particular information in the address, please click Finish to make corrections in the next step.



## Review address information

Please check your address information carefully, and correct it if needed.  
Note: Address information filled out here will be automatically filled in all relevant fields on application form. Please check carefully to ensure data correctness.

**Address** \* required

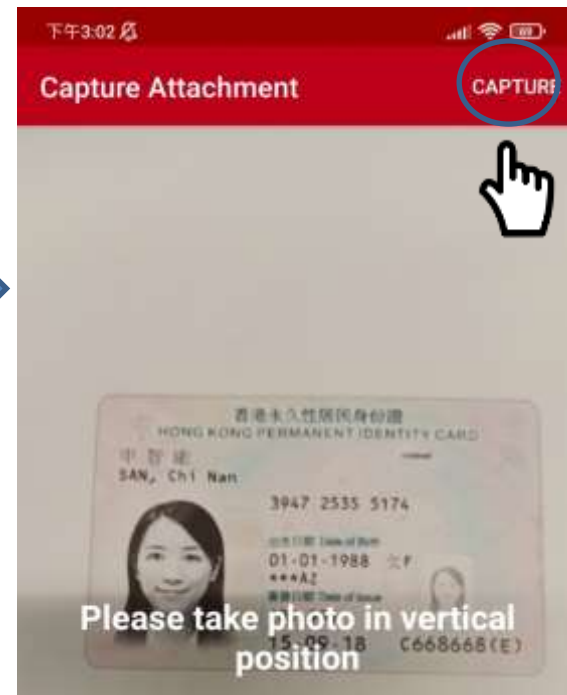
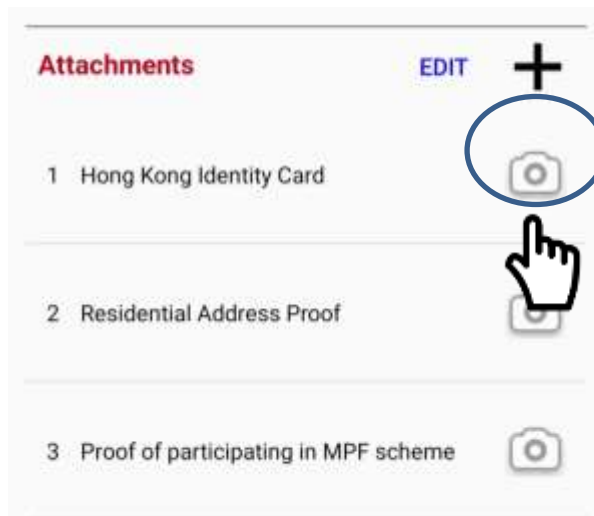
Please scan address proof by clicking the camera button on the right (not applicable to PM, PC, PP form)  
Reminder: A valid residential address proof (e.g. utility bill, bank statement) should show your name clearly and issued within the last 3 months 

Flat / Room	Floor	Block
<input type="text" value="2403"/>	<input type="text" value="24"/>	<input type="text" value="Block"/>
Name of Building / Estate		
<input type="text" value="CiticorpCentre"/>		
Street No.	Name of Street	
<input type="text" value="18"/>	<input type="text" value="Whitfield Road"/>	
District	Area	
<input type="text" value="Causeway Bay"/>	<input type="button" value="HK"/> <input type="button" value="KLN"/> <input type="button" value="NT"/> <input type="button" value="Oversea"/>	



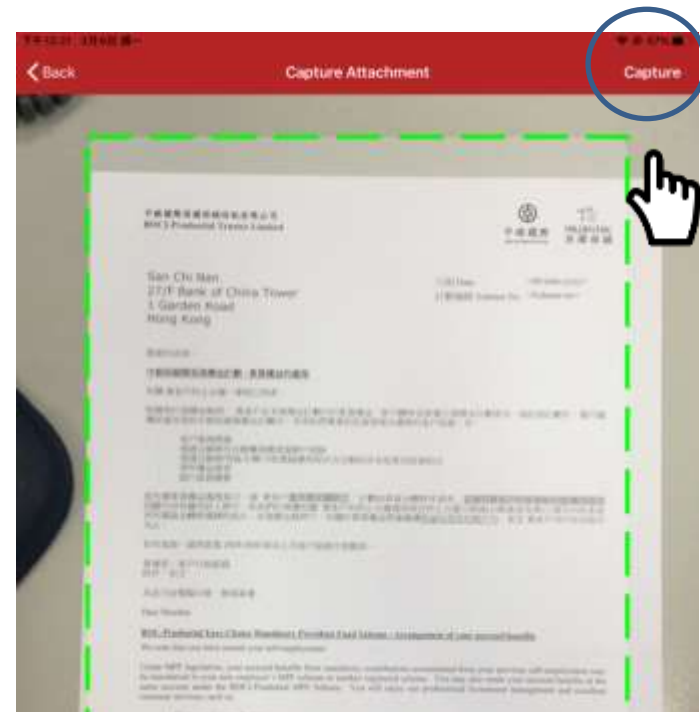
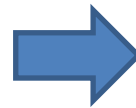
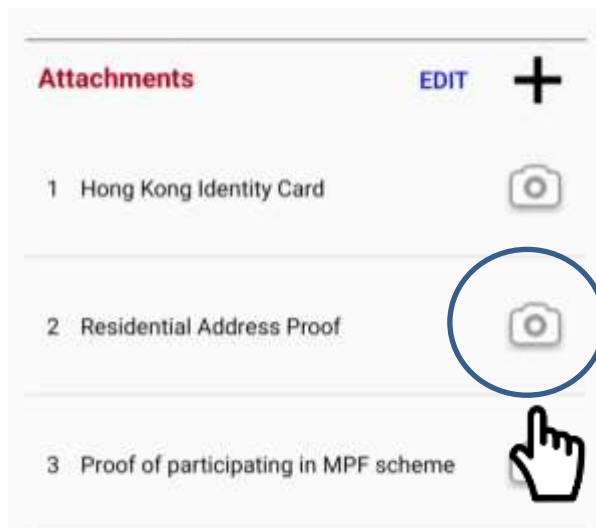
## Scan HKID (only applicable if not using OCR to scan HKID)

- If you have used OCR to scan HKID card in previous step, photo image is already added to attachment and you can skip this step.
- Please click the “Camera” icon in the “Attachments” section.
- Press “Capture” to take photo of **original** copy of client’s HKID card.
- The HKID card image taken here will be attached to the HKID certified true copy declaration for completion later.



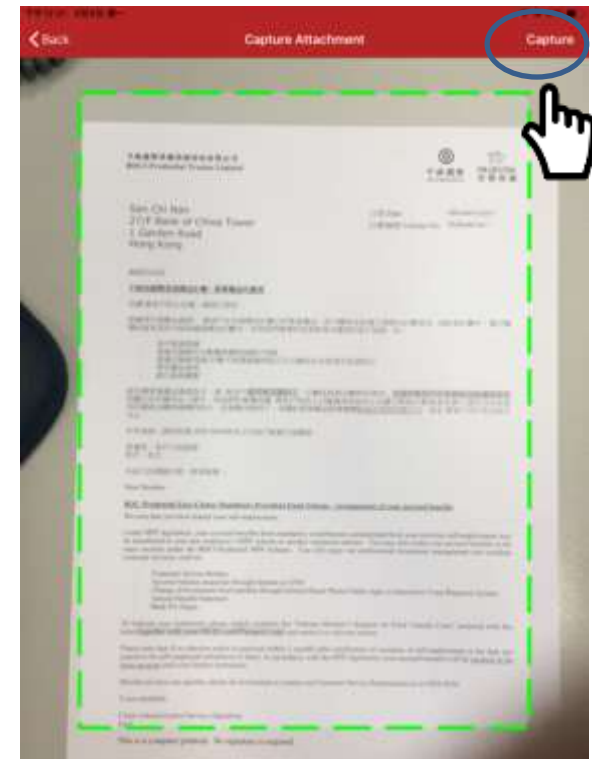
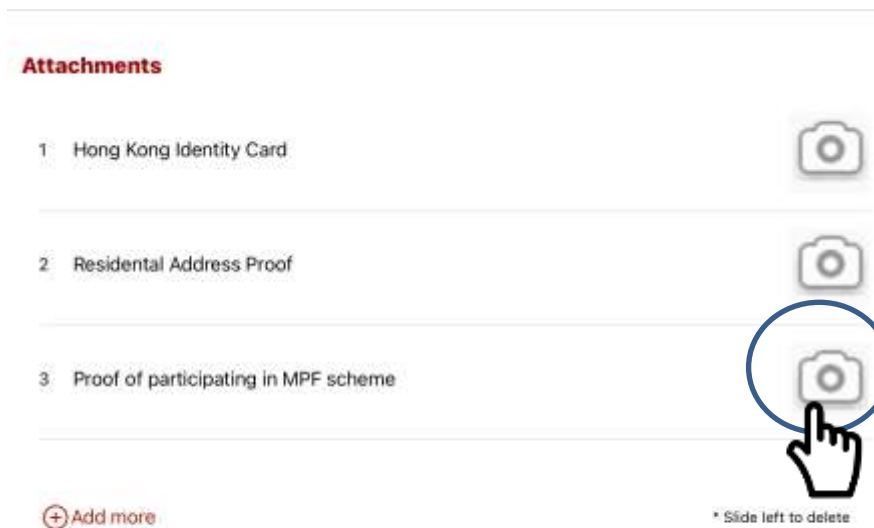
## Upload address proof document (Not applicable to PM, PP, PC, PT fund transfer forms)

- Please scan a latest residential address proof **showing client's name issued within the last 3 months** (e.g. utility bill, bank statement).
- When taking photos of “Residential Address Proof” document, in addition to the address information, the document **MUST** also show **customer's name** and **issuance date** at the same time to prove that the residential address proof was issued within **the last 3 months**.
- The relevant document image will be uploaded together with application form to the Trustee as supporting document.
- Press “Capture” to scan the address proof document.



## Upload other supporting document

- If client wants to apply **Tax Deductible Voluntary Contribution (TVC)** account, please click the camera icon of “Proof of participating in MPF scheme”. Please scan the documents evidencing client’s current or historical participation of any registered MPF scheme or ORSO scheme (e.g. membership certificate, notice of participation or annual benefit statement).
- The relevant document image will be uploaded together with application form to the Trustee as supporting document.
- Press “Capture” to scan the supporting document.



^ Documents evidencing your current or historical participation of any registered MPF scheme or ORSO scheme (e.g. membership certificate, notice of participation or annual benefit statement)

## Input mobile No. and email address

Please fill out mobile No., email address and other information, then click “Next” to continue.

The screenshot shows a mobile application interface for a TVC application. The top bar is red with a back arrow, the text 'My Choice', the title 'My Choice - TVC Application...', and buttons for 'Save' and 'Next'. Below the bar, it says 'Personal Information' and 'Step 1 of 8' with a progress indicator. The main form area is titled 'Other Information' and contains several fields: 'Job Nature' (a dropdown menu with 'Please Select'), 'Email Address' (a text input field), 'Local Mobile Tel. No.' (a dropdown for '+852' followed by a text input), 'Residential Phone No.' (a dropdown for '+852' followed by a text input), 'Phone No. outside HK' (a dropdown followed by a text input), and 'Name of Business (if any)' (a text input). A blue box highlights the 'Other Information' section, and a blue arrow points to the 'Email Address' field. A hand icon is pointing to the 'Next' button.

Please input the required information. Information required may vary among different kinds of forms, please input information as instructed.

### 3 Fill out and sign on application form

#### Fill in the application form – Tax Residency Self-Certification

Please fill out Tax Residency Self-Certification information. If client's jurisdiction of tax residency is other than Hong Kong, please select the applicable option and fill out the information required.

##### Tax Residency Self-Certification



Step 2 of 10



- Hong Kong ONLY, with no tax residence in any other jurisdictions
- Hong Kong (Tax Identification Number: my HKID Card No. provided) AND also some other jurisdictions (Please fill out the TIN for all other jurisdictions, other than HK, in the table of Section (II)).
- NOT Hong Kong, but instead some other jurisdiction



### 3 Fill out and sign on application form

#### Fill in the application form – Investment Choice

Please select fund choice(s) and input percentage. Percentage of each fund is at least 5% and the total must sum up to 100%.

The screenshot displays the 'Investment Choice' section of an application form. At the top, it indicates 'Step 3 of 10' with a progress bar of 10 circles, the first three of which are red. A red bar below shows 'Total 0/100%'. Under the 'Investment Strategy' heading, there is a 'Default Investment Strategy' section. A box containing 'MyDIS' with an external link icon is highlighted, with an arrow pointing to the text 'Hyper link to fund fact sheet'. To the right of this is a percentage input field showing '0%' with minus and plus buttons below it. An arrow points from this field to the text 'Input percentage of selected fund choice'. Below this section, the heading 'Equity Fund' is visible.

### 3 Fill out and sign on application form

## Notes on filling out the TVC application form

To apply for TVC account, please select contribution frequency and fill in contribution information.

**Contribution Details**

Step 3 of 10 ● ● ● ● ● ● ● ● ● ●

Contribution Frequency and Period

Monthly Contribution  
- Subject to a minimum amount of HK\$300  
Autopay (Please download and complete the "Member Direct Debit Authorization" form from Download Corner on BOCPT's website <https://www.bocpt.com> and return the form to BOCPT for processing).

Regular TVC must be made by direct debit, please complete the "Member Direct Debit Authorization" form as stated above and return to the Trustee for processing. Please note that the first regular TVC will be debited from your bank account on the 5th business day of each month after we have sent out a "Confirmation of Autopay instruction".

Amount of Regular TVC

Lump Sum Contribution  
(Lump Sum Contribution is subject to a minimum amount of HK\$1,000)  
To expedite processing your application, please return this form to the Trustee together with a crossed cheque made payable to "BOCI-Prudential Trustee Limited".  
Do not send cash or make payment at any bank counter.

To expedite processing your application, please return this form to the Trustee together with a crossed cheque made payable to "BOCI-Prudential Trustee Limited". Do not send cash or make payment at any bank counter.

Name of Bank

Cheque Number

Cheque Amount HK\$

### Reminder for TVC payment:

**Lump sum payment** – please send to Trustee a crossed cheque made payable to "BOCI-Prudential Trustee Limited".

**Monthly payment** – please submit a "Member Direct Debit Authorization" form.

Please mark your payment details on the form and [click here](#) for more details on how to make TVC payment.

### 3 Fill out and sign on application form

## Notes for filling out the **Self-Employed Person (SEP)** application form

To apply for SEP account, please input contribution details.

### Contribution Details

Step 4 of 12 ● ● ● ● ● ● ● ● ● ●

Scheme Commencement Date (if you do not have a SEP account, Scheme Commencement Date is same as Date Commenced Self-Employment)

06/04/2022

Date Commenced Self Employment

06/04/2022

Please input Scheme Commencement Date and Date Commenced Self Employment. The 2 dates are the same if you do not have a SEP account before

**Self-employed person's contribution reminder:**

Please [click here](#) for the various payment methods.

### Payment method

Cheque

Autopay (Please download and complete the "Self-Employed Person Direct Debit Authorization" form from Download Corner on BOCPT's website <https://www.bocpt.com> and return the form to BOCPT for processing).

Please select payment method. For details, please refer to the contribution reminder at right hand side.

### Declaration of relevant income

#### Contribution Frequency and Period

Monthly: (First day to last day of the month. The contributions will be paid by the end of each month.)

Yearly: (Contribution Period from 1st April each year to 31st March of the following year. The contributions will be paid by 31st March each year.)

Please select monthly or yearly payment

I have read and understood the Notes below, and hereby declare that my annual relevant income for the payment of mandatory contributions for the scheme year into which the Scheme Commencement Date (as given in Part B) falls is HK\$

0

Please input relevant income for the scheme year (1<sup>st</sup> April to 31<sup>st</sup> March) commenced self employment

and confirm that I will make mandatory contributions based on this amount.

### 3 Fill out and sign on application form

#### Notes for filling out the **Self-Employed Person (SEP)** application form

If Scheme Commencement Date does not fall into the current scheme year, please also provide relevant income of other scheme year(s).

**If Scheme Commencement Date does not fall into the current scheme year, please also provide Contribution Details and Declaration of the Relevant Income of other Scheme Years**

Step 5 of 12 ● ● ● ● ● ● ● ● ●

I have read and understood the Notes below, and hereby declare that my annual relevant income for the payment of mandatory contributions for the below financial year(s) and confirm that I will make mandatory contributions based on this amount.

**(+) Add more**

Click "Add more" to input relevant income for other scheme years (can input up to 5 years' records)

\* Slide left to delete

Scheme Year

(e.g. 2020-2021)

Relevant Income

Contribution Details

Monthly

Yearly

### 3 Fill out and sign on application form

## Fill in the application form— Input MPF intermediary details

Please input details of MPF intermediary.

**MPF Intermediary Particulars**

Step 4 of 9 ● ● ● ● ● ● ● ●

**Category** \* required

New MPF account's agent

**Name of MPF Intermediary (Full Name)**

DUMMY BRT

**MPF Intermediary Registration No.** \* required

123456

**Name of Principal Intermediary** \* required

Prudential Hong Kong Limited 保誠保險有限公司

**Bank Code** **Branch Code**

Bank Code Branch Code

**Agent / Bank Staff Name** \* required

DUMMY BRT

**Agent / Bank Staff Code** \* required

99999999

(this option apply to transfer form only)  
Please select need to assign a new agent or not

New MPF account's agent  
Existing MPF account's agent

Please input MPFA registration No.

### 3 Fill out and sign on application form

## Fill in the application form – Input client information on Sales Activity Information Sheet (“SAI”)

Please input client information on SAI form.

**MPF Sales Activity Info Sheet - Information of Client ("Client")**

Step 5 of 9 ●●●●●●●●

Indicate Reason(s) for Choosing the Scheme \* required

- Brand Name
- Fund Choice
- Consolidation
- Professional Experience
- Integrated Service
- Other Scheme Features

---

**Client with Special Needs**

(Not applicable to employer application)

Is your education level above primary level?

Yes     No^

Can you read Chinese or English?

Yes     No^

Are you free from any disability that will affect your ability to make key decisions (a key decision for this purpose of this Information Sheet refers to one of the following decisions: (a) choosing a particular constituent fund; (b) making a transfer that would involve a transfer out of a guaranteed fund; (c) making an early withdrawal of accrued benefits from the MPF System; or (d) making how much voluntary contributions into a particular registered scheme or a particular constituent fund) independently?

Yes     No^

→ Please select the applicable option

### 3 Fill out and sign on application form

## Fill in the application form – Please read the Notes carefully

Please click and read the Notes carefully. Please select the last button to ensure you have read and selected all items.

### MPF Sales Activity Info Sheet - Declaration & Signature (Client)

Step 6 of 10 ● ● ● ● ● ● ● ● ● ●

You must read all items

- e-member service >
- Personal Information Collection Statement ("PICS") >
- Declaration >
- Participation Agreement >
- MPF Sales Activities Information Sheet - Personal Information Collection Statement ("PICS") >
- MPF Sales Activities Information Sheet - Declaration by Client >
- \* I declare that I have read and understood all items above >

Prior Consent for "e-Member" Services (only applicable to person who elects to become a "e-Member" in Part A):  
I (the "recipient") hereby consent to BOCI-Prudential Trustee Limited (the "sender") giving all notices and documents in relation to the BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme (the "Scheme") to me as a member of the Scheme by the following electronic means:

This consent applies to all notices and documents, including:  
- Benefit Statements  
- Fund Re-Balancing Statement  
- Change of Investment Mandate Statement  
- Confirmation for Special/Tax Deductible Voluntary Contribution  
- Unit Withdrawal Statement for Special/Tax Deductible Voluntary Contribution  
- Trust Deed/Notice of MPF Scheme Brochure amendment, new services announcement  
- Other notices and documents as published from time to time on the sender's website

I agree to receive all notices and documents in relation to the Scheme by the following means:  
- By making the notices and documents available to the recipient on the sender's website www.bocpt.com→Account Login→e-Statement  
- By notifying the recipient via "e-Alert" of the availability of the notice and document to the recipient's email address or through mobile device stated in Part A of this form (compulsory)

In relation to: The MPF account of this form held under the Scheme  
- While the recipient may retain the consent to use "e-Member" services applicable to his/her current employee account when his/her accrued benefits are transferred to a personal account, provided that the recipient has no pre-existing personal account under the Scheme, but not vice versa - the "e-Member" services applicable to the recipient's current employee account will be discontinued when such account is transferred to the pre-existing personal account to which "e-Member" services are not applicable.

I (the "recipient") have read, understood & agreed that:  
Duration of availability of the notices or other documents on the website:  
- Any notices or documents made available on the sender's website or by

OK

Please select to ensure you read and select all items above.

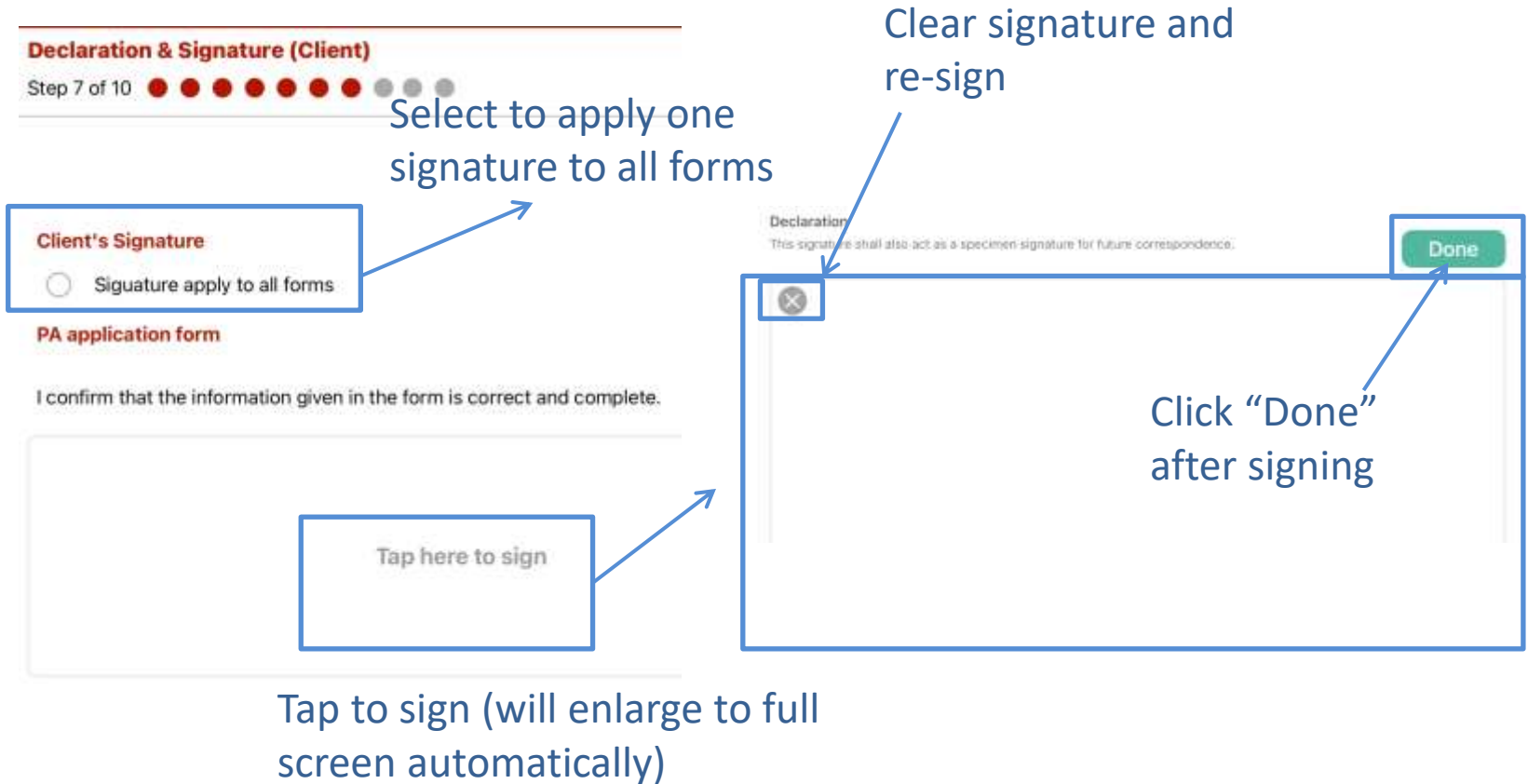




### 3 Fill out and sign on application form

#### Fill in the application form – Client's signature

Please sign on mobile device and client can choose to apply one signature to all forms.



### 3 Fill out and sign on application form

## Fill in the application form – Declaration items of agent

Prudential agent please read the declaration items on Sales Activity Information Sheet.

**Declaration & Signature (Agent)**

Step 8 of 10

You must read all items

Subsidiary Intermediary's Information & Declaration >

\*I declare that I have fulfilled all the above requirements during my regulated activities.

Please click to declare agent has read and selected all items.

I, as a Subsidiary Intermediary attached to the Company, hereby declare that I have fulfilled the following requirements during my regulated activities.

1. presented my Prudential name card, by physical or electronic means, and informed the client of my name and MPF registration number, and is registered as a Subsidiary Intermediary of the Company. I have explained to the client that I shall NOT conduct any regulated activities NOR give any regulated advice to the client in relation to the client's material decision involving a particular constituent fund of the Scheme or involving a particular amount to pay as voluntary contributions, a particular amount to transfer as accrued benefits or to make an early withdrawal of accrued benefits from the MPF system;
2. NOT rendered any investment advice to the client, and when the client asked for any comparison of past performance of constituent funds under the Scheme, I purely referred the client to the MPF Fund Platform hosted by the MPFA for such comparison. I have also informed the client that past performance is not necessarily a reliable indicator of future performance;
3. explained to the client about the Company's information as below:  
Name: Prudential Hong Kong Limited  
Principal place of business: 59/ F One Island East, 18 Westlands Road, Quarry Bay, Hong Kong  
Nature of business: Insurance  
Relevant conditions: Permitted to advise on insurance policies/ Permitted to sell

OK

### 3 Fill out and sign on application form

## Fill in the application form – agent's signature

Please sign on mobile device and agent can choose to apply one signature to all forms.

The screenshot shows a mobile application interface for the 'Declaration & Signature (Agent)' step, which is Step 9 of 10. The interface includes a progress indicator with 10 red dots, the first 9 of which are filled. Below the progress indicator, there is a section titled 'Agent's Signature' with a red dot and the text 'Signature apply to all forms'. A blue box highlights this section, with an arrow pointing to the text 'Select to apply one signature to all forms'. Below this, there is a declaration text: 'I declare and confirm that I shall comply with the Personal Data (Privacy) Ordinance, the Mandatory Provident Fund Schemes Ordinance and all other applicable ordinances and rules, guidelines and code of conduct issued by (or as amended from time to time) the relevant authorities when using the above Member's Information.' and 'I, as MPF Intermediary of the client, confirm that the Hong Kong Identity Card/Passport provided here is a copy of the original'. A large white box with a blue border and a blue 'X' icon is positioned over the signature area, with a blue box around the 'X' and an arrow pointing to the text 'Tap here to sign'. A blue box around the top-left corner of the signature area has an arrow pointing to the text 'Clear signature and re-sign'. A green 'Done' button is located in the top-right corner of the signature area, with a blue box around it and an arrow pointing to the text 'Click "Done" after signing'.

Tap to sign (will enlarge to full screen automatically)

### 3 Fill out and sign on application form

#### Fill in the application form – Filling fund transfer form (applicable to personal account and self-employed person only)

If personal account or self-employed person needs to transfer MPF assets during account application, please select “Yes” to transfer MPF assets and choose the applicable transfer form.

##### Fund Transfer

Step 10 of 10



Do you have MPF accounts to be transferred from other MPF Scheme?

- Yes, I have MPF scheme(s) to be transferred
- No, I do not have MPF scheme to be transferred



Do you have MPF accounts to be transferred from other MPF Scheme?

- Consolidate of Personal Accounts  
P(C) form (Scheme Member's Request for Account Consolidation Form)
- Transfer employee portion's benefits from contribution accounts under current employment  
PP form (Employee Choice Arrangement ("ECA") - Transfer Election Form)
- Transfer of MPF account for SEP, personal account holder or employee ceasing employment  
PM form (Scheme member's request for fund transfer form)

### 3 Fill out and sign on application form

## Fill in the application form— Filling fund transfer form (applicable to personal account and self-employed person only)

Client's personal data, images of HKID card and address proof etc. will be copied from information input at previous step. Please check carefully and click "Next" to continue.

#### Personal Information

Step 1 of 9 ● ● ● ● ● ● ● ●

Please scan HKID by clicking the camera button on the right.  
Please note: only scan a ORIGINAL copy of HKID card.



#### English name

as shown on your Hong Kong Identify (HKID) Card

#### Surname

\* required

San

#### Other Name

\* required

Chi Nan

#### HKID / Passport No.

\* required

HKID

Passport No.

C668668(9)

#### Sex

\* required

#### Birthday

\* required

Male

Female

1988

/ 1

/ 1

Preview

### 3 Fill out and sign on application form

## Fill in the application form— Filling fund transfer form (applicable to personal account and self-employed person only)

Please fill in fund transfer information as instructed.

#### Transfer Information

Step 2 of 9 ● ● ● ● ● ● ● ● ●

Important information : If you wish to transfer your accrued benefits from other MPF scheme to BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme, 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 have not given any investment instructions for the transferred-in benefits of the transferee account. Please approach us to seek clarification, where necessary.

#### MPF account information in the original scheme

Name of original trustee

-- Please Select --

Name of original scheme

-- Please Select --

Type of MPF account

- Personal account
- Contribution account

Scheme Member Account No.

Scheme Member Account No.

Other:

- For employee who wishes to transfer-out the benefits from a contribution account after cessation of employment
- For self-employed person only

### 3 Fill out and sign on application form

#### Fill in the application form— Filling fund transfer form (applicable to personal account and self-employed person only)

Please check agent's information, read the Notes carefully and choose agree/disagree options etc. Press "Next" to continue.

##### MPF Intermediary Particulars

Step 4 of 9 ● ● ● ● ● ● ● ● ●

Category

\* required

Existing MPF account's agent



Name of MPF Intermediary (Full Name)

\* required

DUMMY BRT

MPF Intermediary Registration No.

\* required

123455

Name of Principal Intermediary

\* required

Prudential Hong Kong Limited 保誠保險有限公司

### 3 Fill out and sign on application form

#### Fill in the application form— Filling fund transfer form (applicable to personal account and self-employed person only)

Please sign on mobile device and client can choose to apply one signature to all forms.

#### Declaration & Signature (Client)

Step 7 of 9 ● ● ● ● ● ● ● ● ● ●

Select to apply one signature to all forms

#### Client's Signature

Signature apply to all forms

#### PM Application form

Tap here to sign

Tap to sign (will enlarge to full screen automatically)

Clear signature and re-sign

Declaration  
This signature shall also act as a specimen signature for future correspondence.

Done

Click "Done" after signing



## Prudential Agent

can click "Save" to save an unfinished form while filling in the form.

**Please note:**

**- Forms not updated or uploaded after 7 days will be deleted automatically.**

- The app will automatically save the form every minute when it is completing.

- Saved file name format is: Doc type abbreviation + save date + client's ID number.

Back Transfer Form P(M) Save Next

中銀國際英國保誠信託有限公司  
BOCI-Prudential Trustee Limited  
香港太古城英皇道1111號3樓1507室  
Suite 1507, 15/F, 1111 King's Road, Taikoo Shing, Hong Kong

中銀國際 PRUDENTIAL  
英商保誠

計劃成員轉移受惠金累積權益(權益)通知  
NOTES TO TRANSFER OF MPF ACCRUED BENEFITS/BENEFITS BY SCHEME MEMBER  
(適用於自僱人士、個人帳戶持有人或終止受僱的僱員)  
(for self-employed person, personal account holder or employee ceasing employment)  
(強制性公積金計劃(一般)規例)(第485A章)第144-146、147-148及149條  
Sections 144, 146, 147, 148 and 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap. 485A)

請在填妥MPFSS-P(M)前仔細閱讀下列重要資料:  
Please read the following important notes before you complete Form MPFSS-P(M).

(1) 詞彙定義:  
Definition of terms:  
(a) "供款戶" - 指根據註冊計劃(計劃)下主要用以接收僱主為僱員所作出的及代為僱員所作出的強積金供款(包括僱主及僱員部分)或僱員本人所作出的強積金供款的帳戶。  
"Contribution account" - 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 employer or by a self-employed person.  
(b) "個人帳戶" - 指計劃下主要用以接收由另一項或數項個人帳戶轉入的權益的帳戶。  
"Personal account" - an account in a scheme which is mainly used to receive the benefits transferred from another contribution or personal accounts.  
(c) "原始受託人" (在《規例》第144條)或(在《規例》第145條) "轉移受託人" - 指轉出權益的計劃的受託人。  
"Original trustee" (also known as "transferor trustee" in the Mandatory Provident Fund Schemes (General) Regulation ("the Regulation")) is the trustee of a scheme from which your benefits are to be transferred.  
(d) "新受託人" (在《規例》第146條)或"轉入受託人" - 指轉入你的權益的計劃的受託人。如你選擇把權益轉移至同一計劃的另一個帳戶或轉移至另一受託人的另一計劃, 則MPFSS-P(M)表格所填的新受託人將與原受託人相同。  
"New trustee" (also known as "transferee trustee" in the Regulation) is the trustee of a scheme in which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same scheme or to another trustee under the same trustee, the new trustee on Form MPFSS-P(M) will be the same as the original trustee.  
(e) "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.  
(f) "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, 則MPFSS-P(M)表格所填的新計劃將與原計劃相同。  
"New scheme" - the scheme in which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same scheme, the new trustee on Form MPFSS-P(M) will be the same as the original trustee.

(2) 如你現時投資於強積金保證基金, 把該保證基金轉出權益, 可能會導致你不符合該基金的所有保證條件, 以致影響你享有保證的資格。請請讀取保證計劃的實文件, 或向原受託人查詢。  
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 the original scheme or consult your original trustee for details.

(3) 如該保證基金(由已設有該帳戶的計劃的帳戶投資)  
If you wish to transfer the benefits of the guaranteed fund to another account, you must be aware that the de-risking of the account at the same time, the trustee of the original scheme should be notified of the transfer of the benefits.  
If you have never notified the trustee of the original scheme of the transfer of the benefits, you should be aware that the de-risking of the account at the same time, the trustee of the original scheme should be notified of the transfer of the benefits.

(5) 請確保你在提交MPFSS-P(M)前  
Please ensure that you have completed the form before you submit Form MPFSS-P(M).

(6) 如欲從多項中  
If you wish to transfer the benefits of the guaranteed fund to another account, you must be aware that the de-risking of the account at the same time, the trustee of the original scheme should be notified of the transfer of the benefits.

(7) 如欲從原來的保證基金  
If you wish to transfer the benefits of the guaranteed fund to another account, you must be aware that the de-risking of the account at the same time, the trustee of the original scheme should be notified of the transfer of the benefits.

Saved as name :  
PM\_20210729\_ A1234567

Back to Home Ok

Abbreviation	Document type
DV	TVC application form
MP	Personal account application form
SE	Self-employed person application form
PM	Scheme Member's Request for Fund transfer form (PM form)
PC	Account Consolidation form (PC form)
PP	Employee Choice Arrangement ("ECA") - Transfer Election form (PP form)
PT	TVC transfer form (PT form)

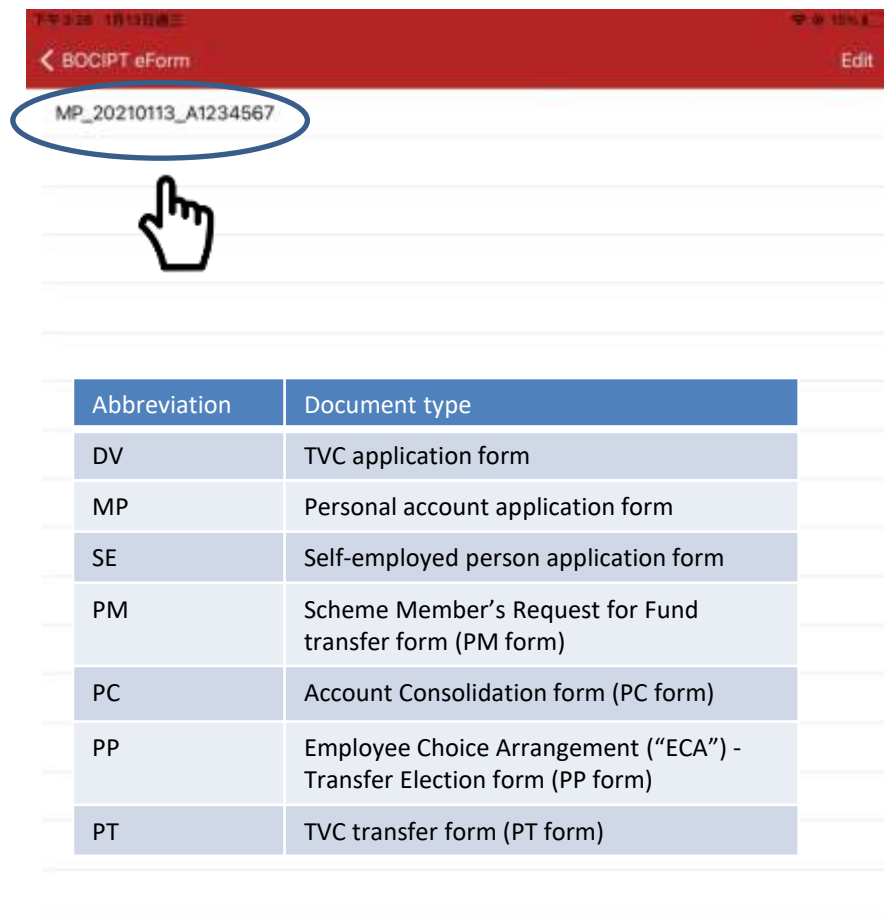
Click "Back to Home" to return to the home page

Click "OK" to continue filling out the form

## Open the saved form


### Prudential Agent

After returning to the home page, click "Saved List" to open the saved form and continue filling out.



## Delete Saved form

### Prudential Agent

Enter the “Saved List” and click “Edit” if you need to manually delete unfinished forms. Click  to delete the form you want.





# 5 Review form

If you need to change the information on the form, please click "Back" to go back to Input mode. When finish checking one form, click "Next" to check next form.

Please click "Back" button to go back to Input mode to correct information.

Application Form - Review

Back Next

我的 MYCHICE 強積金計劃

MY TVCM APP

可扣稅自願性供款成員申請書  
Tax Deductible Voluntary Contribution ("TVCM") Member Application Form

注意: Note

- 請以正楷填寫。Please complete in BLOCK LETTERS.
- 若未有簽署當即本表格並非有效日期。本表格將被視為廢紙。填妥人並須實行執行表格上填列的指示。The form would be deemed invalid if it is not duly signed and dated, and the trustee shall be under an obligation to process the instruction.
- 請於任何修改或更改填妥。Please initial next to any alterations made on the form.
- 在有人對合約及條款與原原本之本計劃合約手續(及其附屬), 或立本計劃之信托契約(包括其他之總計劃的合約屬法例、條例、指引及條約內有關的條約有疑難的問題, 建議委託申請者向非受托人協助)及參與協議書可在我的強積金計劃「本計劃」, 設立可扣稅自願性供款帳戶, 請於成立本申請書時連同香港永久居民身份證填妥之申請副本。1. 填妥內附資料的責任證明及參與計劃聲明一併提交, 並註持有香港永久居民身份證, 請提供填妥之申請副本。Subject to and upon the fulfilment of all applicable requirements set out in the latest version of Principal Brochure (and any addenda thereto), the trust deed constituting the Scheme (including any deed of amendment) and all applicable laws, regulations, guidelines and circulars, a person may open a TVCM account in My Choice Mandatory Provident Fund Scheme ("the Scheme") by completing this application form (under authority vested by the Trustee) and entering a participation agreement. Please submit this application form together with a certified true copy of Hong Kong Permanent Identity Card ("HKID"/Passport), a residential address proof issued within the last 3 months and scheme participation proof. If NOT holder of agreement HKID, please provide a certified true copy of Passport.
- 若僱身或自僱人士須由香港稅務局委任人認證為僱身或自僱人士。自僱之證明人包括認可的執業律師、執業會計師、公證人、稅務顧問、專業顧問或律師。填妥的證明文件須由僱身或自僱人士簽署。The certified copy of identification document must be certified as a true copy by a professional person such as a practicing lawyer-certified public accountancy/public or MPP intermediary. The recipient of the certified true copy will be subjected to the Trustee's final decision.
- 填妥人保留需要更多資料及文件的權利, 以作遵守法例及監管規定之目的。The Trustee reserves the right to request additional information and documents for the purpose of complying with legal and regulatory requirements.
- 如賬戶持有人在約滿前更改住所在任何地區, 閣下必須在該變更的 30 天內通知受托人有關的改變並提供最新的自我證明書。An account holder must notify the Trustee and provide an updated Self-Certification form within 30 days if there is any change in circumstances relating to your status of tax residency.

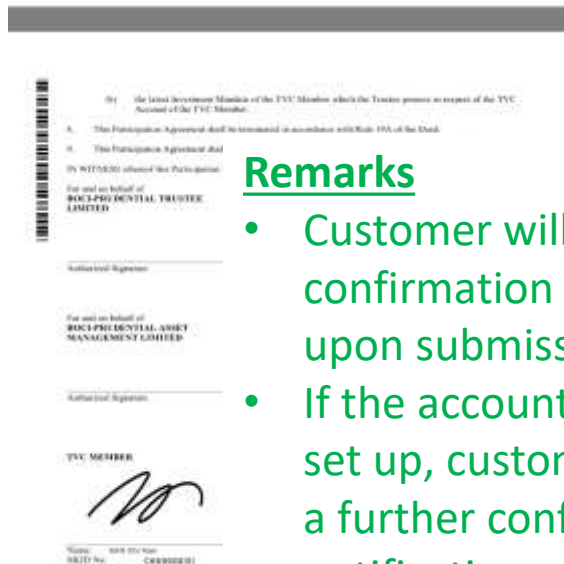
(I) 計劃成員資料 PERSONAL DETAILS OF SCHEME MEMBER

姓名(中文) Name (Full name) 姓 名 姓 名 Surname First name	英文姓名 English Name <input type="checkbox"/> Mr <input type="checkbox"/> Ms Mr SAN Chi Nan	英文姓名 English Name Ms. 申 智 能 Ms. 申 智 能 Ms. 申 智 能 Ms. 申 智 能	計劃編號 (只供內部用) Scheme No. (Internal use only)
開立帳戶日期 Account Opening Date	09/03/2020 日 MM / 月 MM / 年 YYYY		
性別 Sex	<input type="checkbox"/> 男 Male <input type="checkbox"/> 女 Female		
出生日期 Date of Birth	01 01 1988 日 DD / 月 MM / 年 YYYY		
身份證號碼 HKID No. 護照號碼 Passport No.	C668668(E) 請提供香港永久居民身份證或護照號碼。如閣下並非香港永久居民, 請提供護照號碼。Please provide a certified true copy of HKID or PASSPORT holder of agreement HKID, please provide a certified true copy of Passport. 填妥的證明文件須由香港稅務局委任人認證為僱身或自僱人士。填妥的證明文件須由僱身或自僱人士簽署。The certified copy of identification document must be certified as a true copy by a professional person such as a practicing lawyer-certified public accountancy/public or MPP intermediary. The recipient of the certified true copy will be subjected to the Trustee's final decision.		
多國國籍 Multiple Nationality	<input type="checkbox"/> 是 Yes <input checked="" type="checkbox"/> 否 No		
居住地區 Residence (Country/Region)	香港 1. 選擇 (If any) 2. 選擇 (If any)		

Press "Next" to check next form if information is correct.

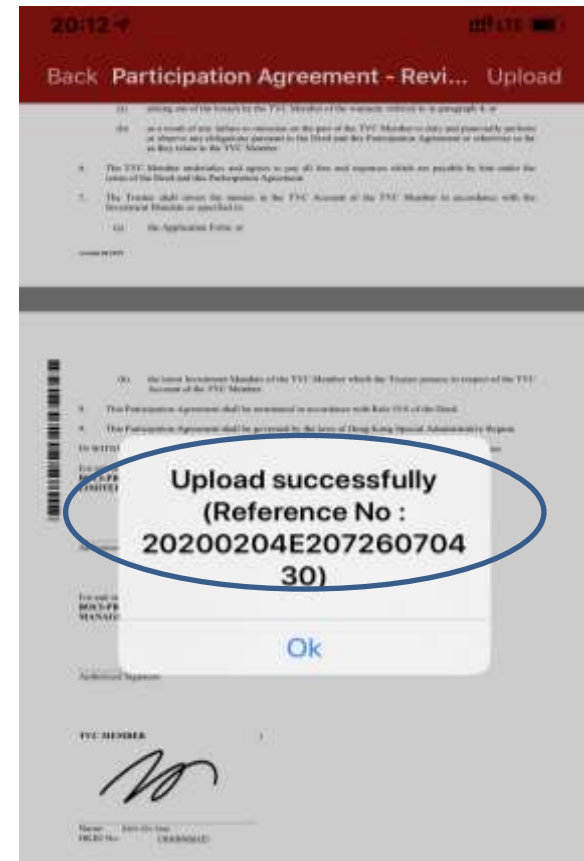
# Submit form

- Click “Upload” to confirm to submit application. Please mark down the Reference No. for future enquiry or provide the Reference No. when submit cheque to make payment.
- Prudential agents can call 2929 3366 for enquiries.

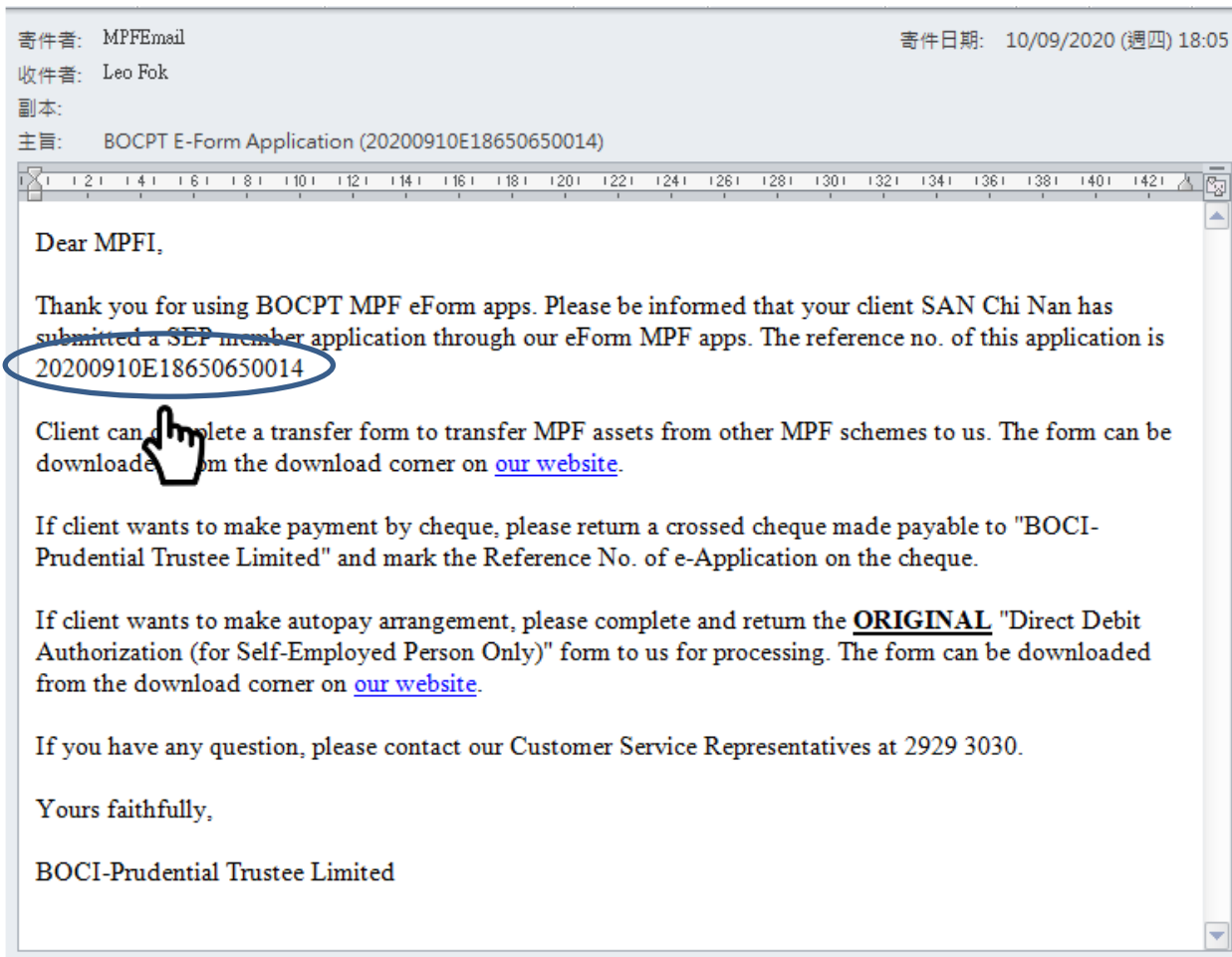


## Remarks

- Customer will receive confirmation SMS and email upon submission.
- If the account is successfully set up, customer will receive a further confirmation notification.



**Prudential Agent** will receive an email notification (sent to the Prudential agent's email address) at the same time. Please record the reference number for future enquiries.



[TVC member](#)



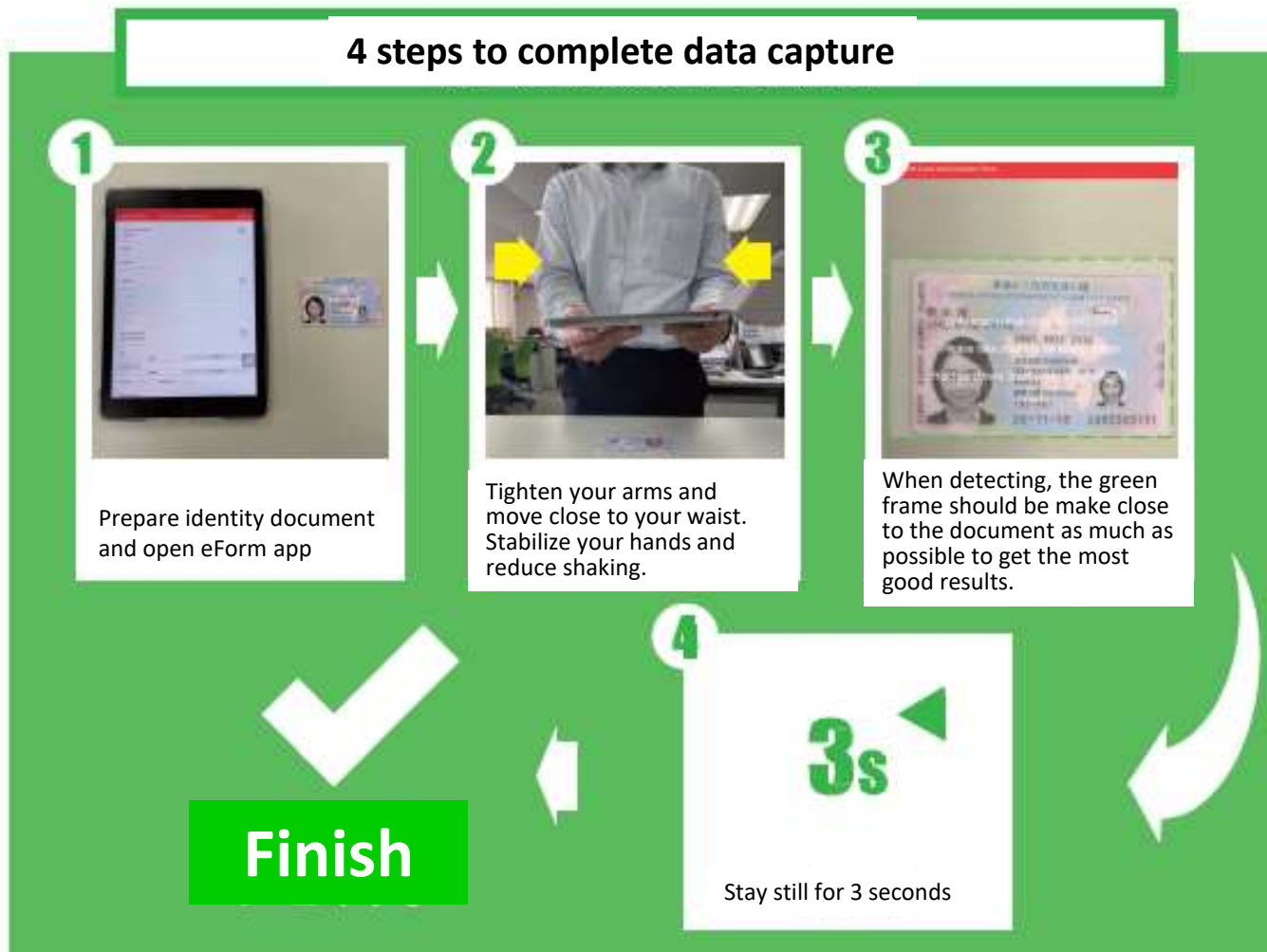
[Self-employed person](#)



Prudential Agent Enquiry Hotline : 2929-3366







**NEXT PAGE**



## Common Mistakes



Backlight, too dark, the shadow covers the doc



Reflection, exposure



Too far away from the document



Document exceeds the green box



Shake and move continuously



Too much background texture

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- **Submit cheque (Post-dated cheque will not be accepted)**
  - Payable to: “BOCI-Prudential Trustee Limited”
  - The account name of the cheque must be the same as the Applicant Full Name.
  - Please mark the Reference No. (you will receive a Reference No. after your application is submitted via the app) and your name at the back of the cheque. Please also remark “for TVC application”.
  - Send the cheque by post or visit Trustee’s **Customer Service Centre** at:  
Suite 1507, 15/F, 1111 King’s Road, Taikoo Shing, Hong Kong  
OR  
Submit the cheque by putting it in an envelope (Please remark “Pass to BOCI-Prudential Trustee Limited for TVC application” on the envelope) and drop it in person at designated [MPF Document Receiving Branch](#) of BOC(HK), Nanyang Commercial Bank and Chiyu Banking Corporation Ltd.
- **Submit Direct Debit (Autopay) form**
  - Please download and complete the “Member Direct Debit Authorization” form at [Trustee’s website](#)
  - The direct debit account must be the personal bank account of the applicant and please provide supporting documents of the bank account
  - Submit an original copy of the autopay form **by post** or **visit** Trustee’s Customer Service Centre at:  
Suite 1507, 15/F, 1111 King’s Road, Taikoo Shing, Hong Kong

 [Please click here to go back](#) 

- **Submit cheque (Post-dated cheque will not be accepted)**
  - Payable to: “BOCI-Prudential Trustee Limited”
  - The account name of the cheque must be the same as the Applicant Full Name.
  - Please mark the Reference No. (you will receive a Reference No. after your application is submitted via the app) and your name at the back of the cheque. Please also remark “for Self-Employed application”.
  - Send the cheque by post or visit Trustee’s **Customer Service Centre** at:  
Suite 1507, 15/F, 1111 King’s Road, Taikoo Shing, Hong Kong  
OR  
Submit the cheque by putting it in an envelope (Please remark “Pass to BOCI-Prudential Trustee Limited for TVC application” on the envelope) and drop it in person at designated [MPF Document Receiving Branch](#) of BOC(HK), Nanyang Commercial Bank and Chiyu Banking Corporation Ltd.
- **Submit Direct Debit (Autopay) form**
  - Please download and complete the “Self-Employed Member Direct Debit Authorization” form at [Trustee’s website](#)
  - Submit an original copy of the autopay form **by post** or **visit** Trustee’s Customer Service Centre at:  
Suite 1507, 15/F, 1111 King’s Road, Taikoo Shing, Hong Kong

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