

BOCI-Pru Easy-Choice eForm MPF Mobile App

**User Manual** 

## Search "BOCI-Pru Easy-Choice eForm" on App Store or Google Play to download the eForm app



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Android



## Click "Open" to start the app

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1. Permanent HKID card of the applicant



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

- General client please click the Easy-Choice MPF Icon at the landing page
- Please choose to fill in the application form for opening a new account or fill in the applicable MPF fund transfer form.

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## Prudential Agent

## after enter login page, please click "MPFI Login" in

## the lower left corner.

 Input user name and password. The user name and password are the same as the BOCPT MPFI online web portal. The user name format is "P-" and an 8-digit Prudential agent code. You need go to the <u>BOCI-Prudential Trustee Limited website</u> to set up your account for the first time.

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7 MPFI Login

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- **Prudential Agent** After entering the login page, a welcome message and reminder notes will appear.
- After logging in, click the "Easy-Choice MPF Scheme" icon. Please choose to fill in the application form for opening a new account or fill in the applicable MPF fund transfer form.



- After selecting the form, you will enter the profile page. Press "Camera" icon at the upper right hand corner to scan HKID card. System will read and populate personal information on application form automatically.
- Please click "OK" to allow the app to access the camera.

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໑ Scan HKID card

The four sides of the HKID card must be placed close to the camera shooting box during scanning. After read information from HKID card, system will move to next step immediately. The scanned HKID card copy will be uploaded to the Trustee together with application form as a supporting document.



After taking photo of ID card, you can press the "Preview" button under the "Sex" column to preview the image of the ID card. If the captured image is not clear or the captured ID image is incomplete, please press the return button in the upper left corner to return to the previous page, and then press the camera icon in the upper right corner to re-shoot the ID card.

Note: Preview function is only available for iOS system temporarily



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**1** Check personal information

Please check your personal information carefully, and correct it if needed. Note: The personal information filled in here will be automatically filled in on the application form.





Click the camera icon at the top of right hand corner at "Address" section, and scan your address image into it.

Note: The scan address function is not suitable for filling in the fund transfer form, thus please skip this part directly.

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After turning on the camera function, align the camera shooting box with the address information on the address proof. If necessary, zoom in to enlarge the address information. Click "Next" when done.



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 (excluding name), and then click "Next".



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

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- Please click the camera icon besides "Residential Address Proof" to scan address proof. Please scan a latest residential address proof showing client's name issued within the last 3 months (e.g. utility bill, bank statement). Note: The upload address proof function is not suitable for filling in the fund transfer form, thus please skip this part.
  - 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.



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Upload

address proof document





- If client wants to apply Tax Deductible Voluntary Contribution (TVC) account, please click the camera icon besides "Other Supporting Document". 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.

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## Input mobile No. and email address at "Other Information" and Press "Next" to continue.

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#### **Other Information**



Input mobile No. and

email address

## System will auto fill personal information using OCR function on the application form. Please check and input the incomplete part(s).

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#### **Please fill in the contribution information on the Tax Deductible Voluntary Contribution (TVC)** application form.

Back **Application Form** Next 供飲資料 PARTC CONTRIBUTION DETAILS 供款方式及供款期 Contribution Frequency and Period 月供<sup>1</sup> Monthly Contribution<sup>1</sup> (盖包件款款為港幣 300 元正 Subject to a minimum amount of HK\$300) 定期可扣根自關性供款必須由自動轉簡面付<sup>2</sup>。請項寫附卷之「成員直接付款授權書」並建同此申請表一併交予受託人辦理+Regular TVC must be made by direct debit", please also complete the attached "Member Direct Debit Authorization" and return to the Trustee for processing. 首次供放陈贽仰受托人登出「解受自動轉越中請及首次自動和威運知書」這仰按單下於本丙酮填寫之「首次供放月份」之筆五個工作日四日 較後者為學)從筆下的銀行戶口中宣付 + Please note that the first regular TVC will be debited from your bank account (i) after we have sent out a "Confirmation of Autopay Instruction" or (ii) on the 5th business day of "Contribution Commencement Month" as indicated in this Part C (whichever is later) 定期可扣积自翻性供数器 HKS 首次供款目份 Amount of Regular TVC Contribution Commencement Month 戶 MM / 年 YYYY 整筆供款 Lump Sum Contribution (葡萄油供款最低供款額為准何1,000 元正 Lump Sum Contribution is subject to a minimum amount of HK\$1,000) 為方便儘媒處理解下之申請。講將此申請表達回畫線支票<sup>3</sup>一世交回變託人、支票約錄為「中國重原英國保護信託有限公司」。請勿都寄現金 成於任何銀行種面繳交 - To expedite processing your application, please return this form to the Trustee together with a crossed cheque3 made payable to "BOCI-Prudential Trustee Limited". Do not send cash or make payment at any bank counter. 前行名稱 支票赋码 支管金额 Name of Bank Cheque Number Cheque Amount HK\$

II Remarks

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- 增下之北角南户古梅台府南半申请老上何于申请人全观相同。The account name of the cheque must be the same as the Applicant Full Name on this Form.

**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.

# Please select monthly or annual payment on the Self-Employed Person (SEP) application form, and fill in the annual relevant income of the scheme year to which the "scheme start date" belongs.



關下反射在最近期通知面内述明的詳稅或已針對最近期詳稅提出上訴。
 You objected to your most recent notice of assessment, or you have appealed against your most recent assessment.

Self-employed person's contribution reminder: Self-employed people can choose to make monthly or annual contributions. Please <u>click here</u> for the various payment methods.

If a **SEP** member needs to fill in the relevant income for more than one scheme year, please go to the last two pages of the application form and fill in the "Declaration of Relevant Income" to declare the relevant income for other scheme years.



\* 由2015年1月月1日起,最近有關人為水平已由每年78,000 進元調整至33,000 進元,由2014年4月1日起,最高考關人為水平已由每年300,000 港名調整至300,000 港北。

Please select monthly or yearly contribution. Your contribution details cannot be amended after the commencement of the above scheme year.

\* If there is no calculate inverses or the calculated inverses in factors the statistics or account is a the minimum hand of released inverses live the

## Please read the Declaration and tick the option box if necessary

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## Prudential Agent Click "Save" to save the incomplete form temporarily while

filling in the form. If the relevant form is not submitted within 7 days, the system

will automatically delete the relevant form.

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## **Prudential Agent** After login, click "Saved List" to open the relevant form.

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Abbreviation	Document type	
DV	TVC application form	
MP	Personal account application form	
SE	Self-employed person application form	
PM	Fund transfer form (PM form)	
PC	Fund transfer form (PC form)	
РР	Fund transfer form (PP form)	

# **Prudential Agent** Enter the "Saved List" and press "Edit" if you need to manually delete unfinished forms. Press 🧔 to delete the form you want. 18:12 COLLET BOCIPT eForm Edit C BOCIPT aForm P\_20210113\_A1234567 MP\_20210113\_A1234567

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### Sign on the white area and press "Sign". Press "Next" to continue.



## Press "Next" to complete Fund Transfer form (apply to Personal Account and SEP Account application form only)



Next

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FORM MPF(S) - P(C)

## Click "Next" to enter the participation agreement page



Please read the following important notes before completing this Form.

#### Filling In This Form

- (a) This Form is to be used for consolidaring studigle personal accounts into any account of your election.
- (0) You must III in both this Form (one page) and the Appendix (one page) and submit them (non page) in tabal to your elected mustor and longs a copy for your tabase reference. If any information provided, including your appendix, is incomment or incomplete, the function may not be able to process your request printingly.
- (c) The personal data to be supplied in support of this electron of transfer are to be used for processing your request for automat consolidation. The personal data you supply may, for each purpose, for transferred to the transaction constrained, the relevant survice providentia, and the persentenet or regulatory bodies including the Mandatory Provident Fund Schueise Authority (MOVA).
- (d) "Consolidation" and "consolidating" of multiple personal accounts refers to transforming all MPE account hundrin (benefits) from several MPF personal account only on account under your elected MPF registered scherine (scherne).
- (e) "Commution account" an account in a scheme which is mainly used to receive MPF contributions that employed and complexyce periods) made by an employer for or on-behalf of the employee or MPF contributions made by a self-employed general.
- (ii) "Prevental account"- an account in a scheme which is mainly used to receive the benefits transferred from other contribution or periodal account(i).

#### Reminders Before Considering

- (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 transferrate and ensurediated. Otherwise, you have to admite a sense takey senselitement from before or at the same take you admit this Form and the Appendix to your elected trastee. Please control by our cleared frame for the procedures and magained documents for entring an an account.
- (0) For each of your presental accounts to be consolidated using this Pirets, the entropy of your benefits in the account, including, without to the governing nodes of the scheme), will be transformed to your also that scheme in a large sum.
- (i) In order to prevent a finited party from Filling in inconnect information, please DO NOT sign on a blank form. After the complexite from and Appendix hore from meteroid by year clasted monter, the administration precodum taken by the instance may with the recentlistic.
- (i) If you are correctly investing to as MPT parameted find, a transfer of the bentTix out of that parameted field may could in some or all of the gammone conditions not being satisfied; thus affecting your entitlement to the paramet. Please check the effering document of the edternis() or cound your intervel) is a duala.
- (k) If you wish to manife your hearfits from one scheme to another, phase be source of hear fite markered-in-benefits will be invested. It is general, the transformal-in-temefits will be invested according to the default investment instruction, which is a down or the original to be tay to or have not given any investment instructions for the account to the viscous of your elected scheme or (ii) have given investment instructions for the account to the viscous of your elected scheme or (ii) have given investment instructions for the account to the viscous of the elected scheme is well confictuation, where reseasary. If you wish is change or questly an investment instruction for the account in the cleared scheme, hence, these wells are traveled with the traveled scheme of the scheme of the scheme hence.

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			LASY-CHOICE - SPA FOR SEP MEMBER SCHEME NO. EC	l
	PA	RTICIPATION AGREEMENT (FOR SEP	MEMBERSI	
THIS	PARTICIPATION AG	REEMENT is made on 07/01/2021 (date)		
-	VEEN			
(1)	BOCI-Prodential Truste Road, Causeway Bay, Hor	e Limited whose registered office is at 120 g Kong (the "Trustee");	F and 25/F, Citicop Centre, 18 Whitfield	
(2) 1	BOCI-Prodential Asset 5 Sarden Road, Central, Ho	Management Limited whose registered affising Kong (the "Manager"); and	er is at 27 <sup>th</sup> Floor, Bank of Chim Tower, 1	

#### RECITALS:

- (A) The Trantov in the studies of the BOC-Productial Easy-Choice Mandatory Provident Fund Scheme (the 'Master Trast Scheme'), which was contributed by a dead dated 27 January 2000 made by the Trastee and the Manager in annexed by them sime to may, the 'Deed').
- (II) The SEP Merder wides to join the Master Trust Scheme in order to establish a retirement benefits achame (the "Participating Scheme").
- (C) The Participating Scheme shall be governed by the Deed and this Participation Agreement.

#### PROVISIONS

- Unless otherwise stated, words and expressions used in this Participation Agreement shall have the meanings given to them in the Deed.
- With effect from the scheme commencement date as specified in the Application Form, the SEP Member hereby establishes a Participating Scheme to be governed by the terms of the Deed and this Participation Agreement.
- The SEP Member hereby covenants with the Trustee to comply with and be board by the provisions of the Dead
  and this Participation Agreement and all applicable laws and regulations.
- 4. The SEP Member warrans that the information from time to time to the provided by the SEP Member (whether in the Application Form or otherwise) in relation to contributions and as to the relevant incoree, age, benefits, low-estment Mandates, Switching Jaurencion Forms and otherwise will be correct in all respects. The Application Forms shall form part of this Participation Agreement.
- 5. Subject to the provisions of the Deed and this Participation Agreement, the SEP Member undertaken and agrees to hold the Trustee and the Manager indetutified against any and all proceedings, cosst, tharget, labilities and expresses secratorised by any and all actions, claims, damands or proceedings in consection with the Manter Trust Scheme or the Participating Scheme either:
  - (a) arising out of the breach by the SEP Member of the warranty referred to in paragraph 4: or
  - (b) as a result of any failure or omission on the part of the SEP Member to shift and punchally perform or observe any obligations pursuant in the Deut and this Participation Agrometer or otherwise so far as they relate to the SEP Member of the Participating Scheree.



Please read the Participation Agreement and roll down to the bottom and Press

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## General Client: After complete and sign on each application form, press "Review" to enter the review mode.



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## Prudential Agent : After fill in and sign on the participation agreement, click "Next"



	Par	ticipation Agreement Next
	(a) the SEP Member shall provide 0 Form and any other information w	te Trustee with such information as may be specified in the Application dich the Trustee may from time to time ecosonably require;
	(b) the making and withdrawal of an infating thereto shall be governe information submitted to the Trua- his sude discritistic change the an- with Rule 3.2.4(c) of the Deed, an	ch Volantary Contributions and the rights and obligations of the parties d by the provisions of the Deol, this Participation Agroement and the new to the Application Form PROVIDED THAT the SEP Member may in ment of SEP Member's Standard Volantary Contribution in accordance al
	(c) the Trastee shall invest the monio Investment Mandate as specified sole discretion change the Investu	in the Contribution Accounts of the SEP Member in accordance with the in the Application Form PROVIDED THAT the SEP Member may in his next Mandato is accordance with the terms of the Deed.
9	This Participation Agreement shall be ter	minated in accordance with Bale 19 of the Deed.
10	This Participation Agreement shall be go	serned by the laws of Hong Kong Special Administrative Region.
D	WITNESS whereof this Participation Agree	count has been entered into the day and year first above written.
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### (SAI form)

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- Press "Upload" to confirm submit application. Please mark down the Reference No. for future enquiry or provide the Reference No. when submit cheque to make payment.
- General client can call hotline 2929 3030 for enquiries; Prudential agents can call 2280 8833 for enquiries.

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- Customer will receive confirmation SMS and email upon submit application.
- 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 or provide the Reference No. when submit cheque to make payment.

寄件者: MPFEmail		寄件日期:	10/09/2020 (週四) 18:05				
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Dear MPFI,							
Thank you for using BOCPT MPF eForm apps. Please be informed that your client SAN Chi Nan has submitted a SEP member application through our eForm MPF apps. The reference no. of this application is 20200910E18650650014							
Client can he download corner on our website.							
If client wants to make payment by cheque, please return a crossed cheque made payable to "BOCI- Prudential Trustee Limited" and mark the Reference No. of e-Application on the cheque.							
If client wants to make autopay arrangement, please complete and return the <b>ORIGINAL</b> "Direct Debit Authorization (for Self-Employed Person Only)" form to us for processing. The form can be downloaded from the download corner on <u>our website</u> .							
If you have any question, please contact our Customer Service Representatives at 2929 3030.							
Yours faithfully,							
BOCI-Prudential 7	ustee Limited						
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## Please scan the QR code below for more information

**TVC member** 

Self-employed person



General customer enquiry hotline : 2929-3030 Prudential Agent Enquiry Hotline : 2280-8833



•

- 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 <u>Reference No.</u> (you will receive a Reference No. after your application is submitted via the app) and <u>your name</u> at the back of the cheque. Please also remark "<u>for TVC application</u>".
  - Send the cheque by post or visit Trustee's Customer Service Centre at: 25/F., Citicorp Centre, 18 Whitfield Road, Causeway Bay, 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 <u>MPF Document Receiving Branch</u> of BOC(HK), Nanyang Commercial Bank and Chiyu Banking Corporation

### Submit Direct Debit (Autopay) form

- Please download and complete the "Member Direct Debit Authorization" form at <u>Trustee's website</u>
- The direct debit account must be the personal bank account of the applicant and please provide supporting documents of the bank account
- Submit an <u>original</u> copy of the autopay form **by post** or **visit** Trustee's Customer Service Centre at:

25/F., Citicorp Centre, 18 Whitfield Road, Causeway Bay, Hong Kong

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- Submit cheque (Post-dated cheque will not be accepted)
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  - Please mark the <u>Reference No.</u> (you will receive a Reference No. after your application is submitted via the app) and <u>your name</u> 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: 25/F., Citicorp Centre, 18 Whitfield Road, Causeway Bay, 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 <u>MPF Document Receiving Branch</u> of BOC(HK), Nanyang Commercial Bank and Chiyu Banking Corporation

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- Submit an <u>original</u> copy of the autopay form **by post** or **visit** Trustee's Customer Service Centre at:

25/F., Citicorp Centre, 18 Whitfield Road, Causeway Bay, Hong Kong

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