

BCT (MPF) Pro Choice / BCT (MPF) Industry Choice
BCT 積金之選 / BCT (強積金)行業計劃

New Business Checklist – Individual Member 新客戶資料核對表 – 個人成員

(I) MPF Intermediary Details 強積金中介人資料			
Name of Broker/Insurer 代理/保險公司名稱		Broker/Insurer Code 代理保險公司代號	
Name of MPF Intermediary 強積金中介人姓名		MPF Intermediary Reg. No. 強積金中介人註冊編號	
Telephone No. 電話號碼		Region Code / Agent Code 區域代號 / 營業員代號	/
email Address 電郵地址		Date of Meeting with Client 與客戶會面日期	
(II) Checklist 核對表			
MPF Plan Set-up Forms and Documents Required 強積金計劃申請表格及其他所需文件			
Name of Client 客戶姓名			
(1) MPF Plan Setup Documents 強積金帳戶申請 – Individual Member 個人成員			
<input type="checkbox"/> BCT (MPF) Pro Choice - BCT 積金之選		<input type="checkbox"/> BCT (MPF) Industry Choice - BCT (強積金)行業計劃	
MPF Scheme 強積金計劃	Required Documents 所需遞交文件：		
<input type="checkbox"/> Application Form – Personal Account Member 個人帳戶成員申請書 AP(PM)	Required 需遞交 (1) & (2)	(1) <input type="checkbox"/> HKID and / or Passport Certified True Copy 香港身份證 及/或 護照核實副本 (2) <input type="checkbox"/> Authorization Letter (Member) 成員授權書 (3) <input type="checkbox"/> Business Registration Certificates Copy (if any) 商業登記證副本 (如有) (4) <input type="checkbox"/> Notice of Assessment Copy (if any) 評稅通知書副本 (如有) (5) <input type="checkbox"/> SEP Scheme Termination Letter to original trustee (if applicable) 自僱人士終止參與計劃通知書 (如適用) (6) <input type="checkbox"/> Direct Debit Authorization Form - Employer / Self-employed Person (if applicable) 僱主/自僱人士直接付款授權書 DDA-NEW (ER/SEP) (如適用) (7) <input type="checkbox"/> Cheque - for Contribution (if applicable) 支票 - 供款 (如適用) Bank 銀行 _____ Cheque No. 支票號碼 _____ Amount 金額 \$ _____	
<input type="checkbox"/> Application Form – Self-employed Person 自僱人士申請書 AP(SEP)	Required 需遞交 (1) - (7)		
<input type="checkbox"/> Application Form – Tax Deductible Voluntary Contribution (TVC) 可扣稅自願性供款申請表格 AP(TVC)	Required 需遞交 (1), (2) & (7)		
<input type="checkbox"/> Application Form – Special Voluntary Contribution (SVC) 特別自願性供款申請表格 AP(SVC)	Required 需遞交 (1), (2) & (7)		
Asset Transfer Documents (if applicable) 資金轉移文件 (如適用)			
<input type="checkbox"/> Request for Fund Transfer Form (For Scheme Member) 資金轉移表格 (計劃成員適用)	RFT(MEM) × _____ sets 份		
<input type="checkbox"/> Scheme member's request for Account Consolidation Form 計劃成員整合個人帳戶申請表格	MPF(S)-P(C) × _____ sets 份		
<input type="checkbox"/> Employee Choice Arrangement (“ECA”) – Transfer Election Form 「僱員自選安排」 – 轉移選擇表格	MPF(S)-P(P) × _____ sets 份		
<input type="checkbox"/> Scheme member's request for Transfer of Tax Deductible Voluntary Consolidation Form 計劃成員可扣稅自願性供款轉移申請表格	MPF(S)-P(T) × _____ sets 份		
(2) Declaration 聲明			
I confirm that I have complied with the Code of Conduct for MPF Intermediaries issued by the Mandatory Provident Fund Schemes Authority and my MPF license is valid. I have no knowledge of any event that will have negative impact on my MPF license as at the date of referring the business to BCT. It is hereby certified that the attached copy(ies) of HK identity card and/or passport(s) has(have) been verified as true copy(ies) of the original (originals).			
Signature by Agent: _____		Date: _____	
Plan Sponsor 計劃保薦人： Trustee & Administrator 受託人及行政管理人：		BCT Financial Limited 銀聯金融有限公司 Bank Consortium Trust Company Limited 銀聯信託有限公司	
		BD Code:	

Individual Members

Forms / documents for scheme set up

1. **NB-IM(BK)** – New Business Checklist - Individual Member
2. **AP(PM)-MT** – Application Form – Personal Account Member
3. **AP(SEP)** – Application Form – Self-employed Person
4. **AP(TVC)** – Application Form – Tax Deductible Voluntary Contribution (TVC)
5. **AP(SVC)** – Application Form – Special Voluntary Contribution (SVC)
6. Certified copy of HKID
7. **RFT(MEM)** – Request for Fund Transfer Form (For Scheme Member)
8. **MPF(S)-P(C)** – Account Consolidation Form (For Personal Account only)
9. **MPF(S)-P(P)** – Employee Choice Arrangement (“ECA”) – Transfer Election Form
10. **MPF(S)-P(T)** – Request for Transfer of Tax Deductible Voluntary Consolidation Form
11. **Authorization letter by Members** – “**Principal Intermediary**” instead of individual agent shall be **appointed as the servicing agent**. Please be reminded to **mark agent code at the lower right hand corner**.

Marketing Materials

1. Product Summary
2. Key Scheme Information Document (KSID)
3. Personal account leaflet
4. TVC leaflet
5. ECA leaflet