

Note 注意

1. Please mark “✓” in the appropriate box. 請於適用的方格內填上「✓」號。
2. Please countersign any alterations made in this form. 如須作出任何刪改，請於刪改之位置旁簽署。

Part I. Employer / Employee Details 僱主 / 僱員資料		
Name of Plan 計劃名稱	BCT Premier Pooled ORSO Retirement Plan 銀聯信託超卓匯集退休計劃	Participating Plan No. 參與計劃編號
Name of Company 公司名稱	English	
	中文	
Name of Employee 僱員姓名	English (Mr / Ms / Mrs*)	HKID Card No. 香港身份證號碼
	中文 (先生 / 女士 / 太太*)	Passport No. (<i>ONLY</i> for member without HKID Card) 護照號碼 (本欄僅供沒有香港身份證的成員填寫)
E-mail Address 電郵地址		Contact Phone No. 聯絡電話號碼

Part II. Change of Personal Particulars 更改個人資料	
Items 類別	Updated Information 最新資料
<input type="checkbox"/> Change of Name of Member 更改成員姓名 (Please provide the certified true copy of identification document, including Deed Poll and HKID Card / Passport, etc. 請提供正本核實的改名契及身份證明文件副本，如香港身份證 / 護照等。)	Surname 姓 (English 英文) _____ First Name 名 (English 英文) _____ Chinese Name 中文姓名 _____
<input type="checkbox"/> Change of Date of Birth 更改出生日期	_____ / _____ / _____ D日 / M月 / Y年 <input type="checkbox"/> Change of Nationality 更改國籍 _____
<input type="checkbox"/> Change of Residential Address 更改住址 (“In-care-of” address and P.O. Box address will not be accepted. All correspondence will be sent to this address. 「轉交」地址及郵政信箱恕不接受，所有通訊將寄往此地址。)	Flat / Room 室 _____ Floor 樓 _____ Block 座 _____ Building / Estate Name 大廈 / 屋苑名稱 _____ Street / Road 街道 _____ District 地區 _____ <input type="checkbox"/> Hong Kong 香港 <input type="checkbox"/> Overseas (Country and City) 海外(國家及城市) [▽] <input type="checkbox"/> Kowloon 九龍 <input type="checkbox"/> China 中國 _____ (City 城市) <input type="checkbox"/> New Territories 新界 <input type="checkbox"/> Others 其他 (Please specify 請說明) _____ (Country 國家) _____ (City 城市)

[▽] For overseas address 適用於海外地址

* Delete as appropriate 請刪去不適用者

Part II. Change of Personal Particulars 更改個人資料 (Continued 續)

<input type="checkbox"/> Change of Contact Details 更改聯絡資料	<input type="checkbox"/> E-mail Address 電郵地址 _____				
	Telephone No. 電話號碼	Country Code 國家號碼	Area Code 地區號碼	Phone No. 電話號碼	Ext. 內線
	<input type="checkbox"/> Local Mobile 本地手提				
	<input type="checkbox"/> Business 辦公室				
	<input type="checkbox"/> Residential 住宅				
<input type="checkbox"/> Others 其他	<input type="checkbox"/> China / Overseas 中國 / 海外				

Important Note 重要提示：

If your information update, such as change of address or telephone number, causes the country / countries and / or jurisdiction(s) of tax residency previously identified being incorrect or incomplete, please provide a suitably updated self-certification within 30 days of such change in circumstances.

若您的資料更新(如地址或電話)導致之前申報的國家及 / 或司法管轄區的稅務當局資料不正確或不完整,您必須在改變後的30天內提供最新的自我證明。

Part III. Account Balance SMS Service 計劃戶口結餘短訊提示服務

To keep you updated of your account status, you may choose to receive an SMS message from us advising your account balance every month. 選擇短訊提示服務,每月為您提供戶口結餘,讓您掌握戶口最新狀況。

 New Application 首次申請

 Change of Contact Details 更改聯絡資料

<input type="checkbox"/> Local Mobile Phone No. 本地手提電話號碼	Please provide your local mobile phone no. in Part II for the purpose of providing such service. 請於第II部份提供您的本地手提電話號碼。	
<input type="checkbox"/> SMS Language 短訊提示語言	<input type="checkbox"/> English 英文	<input type="checkbox"/> Traditional Chinese 繁體中文
Remarks 備註 1. The figures will be calculated by using the fund price as at the last business day of previous month. Information on account balance is for reference only. 數額將根據上月最後一個工作天之基金價格計算。戶口結餘資料僅供參考。		

 Service Cancellation 服務取消

I hereby confirm to cancel the Account Balance SMS Service. 本人確認取消戶口結餘短訊提示服務。

(Note 注意: Cancellation shall take effect after five business days upon receipt of your instruction. 服務將於本公司接獲您的取消指示當天起計五個工作天後取消。)

Part IV. Personal Information Collection Statement 收集個人資料聲明

The personal data provided by or in respect of Members and Participating Employers of the Plan (concerning application records and operational records and / or their dealing / transaction details records) will only be accessed and handled by properly authorised staff of Bank Consortium Trust Company Limited ("BCTC" the trustee of the Plan), BCT Financial Limited ("BCTF", the sponsor of the Plan) and their properly authorised service providers and agents, and may be used, disclosed and / or transferred (whether in or outside Hong Kong) to such persons as BCTC or any of its service providers may consider necessary, including governmental authorities and regulators, for any of the following purposes: (i) exercising or performing the functions conferred or imposed by or under or for the purposes of the Occupational Retirement Schemes Ordinance and Mandatory Provident Fund Schemes (Exemption) Regulation; (ii) providing provident fund services including the processing, administering, managing, and analysing of their, as the case may be, contributions, accrued benefits and portfolios and direct marketing of provident fund services; (iii) improving the provision of provident fund services by BCTC to customers generally (including the facilitation of the provision of services to enable the customers of BCTC generally to access the provident fund (or other) account details through the internet or other means); (iv) compliance with applicable laws and regulations, and court order and / or (v) any other purposes for the exercise or performance of the above mentioned functions. If there is any change in the information provided, BCTC should be notified as soon as practicable. Failure to provide the information requested may result in BCTC being unable to process the instructions.

由本計劃成員及參與僱主所提供或相關之個人資料(有關申請及運作記錄)及 / 或他們的買賣 / 交易細節記錄僅供銀聯信託有限公司(「銀聯信託」,本計劃之受託人)、銀聯金融有限公司(「銀聯金融」,本計劃之保薦人)及它們正式授權之服務供應商及代理之正式授權之職員使用及處理,及在銀聯信託或其任何服務供應商認為有需要時,或被使用、披露及 / 或轉移(在香港境內或境外)予個別人士,包括政府機關及監管機構作以下列任何之目的:(一)行使或執行職業退休計劃條例及強制性公積金計劃(豁免)規例下所授予或施加之職能或根據條例及規例的目的而行使或執行職能;(二)提供公積金的服務包括處理、掌管、管理及分析供款、累算權益及投資組合,視乎情況而定,及直銷公積金服務;(三)改善銀聯信託提供予客戶一般之公積金服務(包括協助提供服務以令銀聯信託之客戶可於互聯網或其他途徑處理公積金(或其他)戶口資料);(四)遵守適用之法律及規例及法院命令及 / 或(五)任何以行使或執行上述職能作目的之用途。如所提供資料有所變更,請在可行的情況下儘快通知銀聯信託。未能提供所需資料可能導致銀聯信託不能處理有關指示。

Members and Participating Employers have a right, without any charge, to request access to and correction of any personal data or to request that personal data about them not be used for direct marketing purposes. Requests can be made in writing to the Data Protection Officer at BCTC, 18/F Cosco Tower, 183 Queen's Road Central, Hong Kong.

成員及參與僱主,在不設任何收費下,有權要求查閱或更改任何個人資料或要求個人資料不被用作直銷之用。請以書面聯絡銀聯信託之資料保護主任,香港皇后大道中183號中遠大廈18樓。

Part V. Authorisation, Declaration and Consent 授權、聲明及同意

By signing this document:

經簽署本文件：

(1) I understand and agree to the terms of the Personal Information Collection Statement as set out in this form.

本人明白及同意於此表格之收集個人資料聲明條款。

(2) I undertake that if there is any change in the information so provided, I shall notify BCTC as soon as reasonably practicable.

本人承諾若所提供之資料有任何更改，將儘快通知銀聯信託。

(3) I declare that to the best of my knowledge and belief, the information given and statements made in this form and / or its attachment(s), if any, are true, correct and complete.

本人聲明，盡本人所知及所信，本表格及隨附之文件(如有)所提供的資料和聲明均屬真實、正確無訛且無缺漏。

(4) I hereby agree to indemnify BCTC against any actions, proceedings, claims, losses, damages, costs or expenses which may be brought against BCTC or suffered or incurred by BCTC arising either directly out of or in connection with BCTC accepting facsimile instructions or e-mail instructions and acting thereon, whether or not the same are confirmed by me in writing. Notwithstanding the above, BCTC has the right to determine which forms or other documents of instructions may or may not be accepted by facsimile or e-mail.

本人同意銀聯信託不論在否得到本人的書面確認下均可接受及處理傳真指示或電郵指示及根據該等指示處理有關事宜，本人亦同意賠償銀聯信託因接受或處理該等傳真指示或電郵指示而直接或間接導致銀聯信託遭受或承受的任何行動、訴訟、理賠、損失、損害、成本或費用。銀聯信託毋須因處理該等指示而直接或間接導致的任何行動、訴訟、理賠、損失、損害、成本或費用而承擔責任。然而，銀聯信託有權決定何種表格或其他指示文件能否以傳真方式或電郵方式傳遞。

(5) I expressly consent to the use of my personal data (name, telephone no., fax no., e-mail address, address and account records) for the purpose of direct marketing of pension and / or investment fund related services (such as provident fund services and financial advice / planning services) and ancillary products by BCTC and BCTF (or their employees or agents); but I understand that BCTC and BCTF cannot make such use of my personal data without my consent and will cease upon my written or verbal request. I further understand that if I do not wish to consent to my personal data being used for the said direct marketing purpose, I should indicate that no consent is given, by ticking this box. 本人即明確表示同意銀聯信託及銀聯金融(及其僱員或代理)使用本人的個人資料(姓名、電話號碼、傳真號碼、電郵地址、地址及戶口記錄)作直銷退休及 / 或投資基金的相關服務(例如退休金服務及財務建議 / 財務計劃服務)及有關產品，但本人明白倘本人不同意銀聯信託及銀聯金融不能如此使用本人的個人資料及倘接獲本人之書面或口頭要求，該使用將停止。本人亦明白如本人不欲將本人的個人資料用作上述直銷用途，本人應在此表格內加上“✓”號，以表示不同意。

(6) I understand and agree that the status of my consent to use my personal data for direct marketing purpose as shown in item (5) above shall represent my latest status in that regard and, accordingly, to the extent that such status is different from my prior status in records of BCTC and BCTF, it will supersede it, so that my prior status shall become invalid and replaced by the status as shown in item (5) above.

我明白並同意，上述第(5)項所示有關本人是否同意將個人資料作為直銷活動用途的意願是我所作出的最新意願。因此，若該最新意願與在銀聯信託及銀聯金融的記錄中本人先前的意願相抵觸，最新意願將取代先前的意願，以致本人先前的意願將變為無效，並替換為上面第(5)項中所示的最新意願。



Signature of Applicant 申請人簽署

Date (D / M / Y) 日期(日 / 月 / 年)

Internal Use Only 內部專用

Date Received:

Input By:

Verified By:

Remarks: