



BCT (MPF) Pro Choice / BCT (MPF) Industry Choice
BCT 積金之選 / BCT(強積金)行業計劃
Employer Voluntary Contribution Set-up / Change Form
設立 / 更改僱主自願性供款表格

Note 注意

1. Any changes relating to Mandatory Contribution or Voluntary Contribution that will alter to a member's detrimental his/her vested benefits or accrued rights under a registered scheme would require approval from the Mandatory Provident Fund Scheme Authority before the change can take effect. 任何與強制性供款或自願性供款有關的修改，若會損害成員在註冊計劃下的既有利益或累算權益，則該項修改須在獲得強制性公積金計劃管理局的批准方可生效。
2. Please mark "✓" in the appropriate box. 請於適用的方格內填上 "✓" 號。
3. 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。
4. For any amendment related to Participation Plan with **ORSO Asset Transfer-in**, please contact Bank Consortium Trust Company Limited ("BCTC") directly. 如欲更改職業退休計劃轉入資產之參與計劃資料，請直接與銀聯信託有限公司("銀聯信託")聯絡。

| Part I. Employer Details 僱主資料 | | |
|-------------------------------|--|-------------------------------|
| Name of Plan 計劃名稱 | <input type="checkbox"/> BCT (MPF) Pro Choice BCT 積金之選 | Participating Plan No. 參與計劃編號 |
| | <input type="checkbox"/> BCT (MPF) Industry Choice BCT(強積金)行業計劃 | |
| Name of Company 公司名稱 | English | |
| | 中文 | |
| Contact Details 聯絡資料 | Contact Person (Mr / Ms / Mrs*) 聯絡人 (先生 / 女士 / 太太*) | Telephone No. 電話號碼 |
| | E-mail Address 電郵地址 | Fax No. 傳真號碼 |

Part II. Details of Voluntary Contribution 自願性供款資料
(Basis of voluntary contribution of employer and employee must be the same 僱主及僱員之自願性供款基準必須相同)

| | |
|--|--|
| <input type="checkbox"/> New Application 首次申請 | Effective Date 生效日期 _____ (D / M / Y 日 / 月 / 年) |
| <input type="checkbox"/> Change of Plan# 更改計劃# | |
| <input type="checkbox"/> Deletion of Plan# 取消計劃# | |

Employer may change details of the Plan twice a year by giving a three-month prior notice in writing. The effective date should be the first day of the contribution period. 僱主每年可更改計劃詳情最多兩次，並須三個月前作書面通知。生效日期須為供款期之第一日。

| Retirement Age 退休年齡 | |
|--|---|
| Early Retirement Age# 提早退休年齡# <input type="checkbox"/> No 沒有 <input type="checkbox"/> Yes 有 (Attaining the age+ of _____ (年滿 _____ 歲+)) | Normal Retirement Age### 正常退休年齡### (Please fill in the age of 65 or below. If you have not specified the age, the statutory retirement age which is age 65 will be applied.) 請填寫65歲或以下之年齡。如您沒有訂明年齡，「正常退休年齡」將預設為法定之65歲。 |
| + Please fill in the age below the "Normal Retirement Age" 請填寫少於「正常退休年齡」之年齡 | |
| And other conditions, if any 及其他條件，如有 _____ | |

Employer continues to make contributions in respect of members who are still in employment after they reach Normal Retirement Age. 在成員於到達正常退休年齡後的僱用期內，僱主仍會繼續為其成員供款。

No 否 Yes 是

Member Category and Vesting Scale of Contribution Rates 成員類別及供款比率歸屬表

| Member Category 成員類別 | Description 描述 | Employer Contribution Rate % 僱主供款率 % | Voluntary Contribution Commencement Date 自願性供款開始日期 | Vesting Scale Option 歸屬比例選擇 (Please refer to the table) (請參考附表) |
|----------------------|----------------|--------------------------------------|--|---|
| | | | | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 |
| | | | | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 |
| | | | | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 |

◆ For change of contribution arrangement, please provide the full list of employees under each member category on a separate sheet. 如更改供款安排，請另紙詳列各成員類別的僱員資料。

▲ (i) Date employed 受僱日期 (ii) Date joined the Plan 參與計劃日期 (iii) Date after completion of three months' probation 完成三個月試用期 (iv) Others (please specify) 其他 (請註明)

Basis of Voluntary Contribution 自願性供款基準

| |
|---|
| <input type="checkbox"/> % x Basic Salary 供款率 x 基本入息 |
| <input type="checkbox"/> (% x Basic Salary) minus Employer's Mandatory Contribution (供款率 x 基本入息) 減去僱主強制性供款 |
| <input type="checkbox"/> % x (Basic Salary in excess of maximum level of Relevant Income**) 供款率 x (基本入息超過最高有關入息**) |
| <input type="checkbox"/> % x Relevant Income** 供款率 x 有關入息** |
| <input type="checkbox"/> (% x Relevant Income**) minus Employer's Mandatory Contribution (供款率 x 有關入息**) 減去僱主強制性供款 |
| <input type="checkbox"/> % x (Relevant Income** in excess of the maximum level of Relevant Income**) 供款率 x (有關入息超過最高有關入息**) |
| ** "Relevant Income" has the meaning ascribed to the term by the Mandatory Provident Fund Schemes Ordinance as amended from time to time. "有關入息"之定義已載於強制性公積金條例內並不時作出修訂。 |

* Delete as appropriate 請刪去不適用者



Part II. Details of Voluntary Contribution 自願性供款資料
 (Basis of voluntary contribution of employer and employee must be the same 僱主及僱員之自願性供款基準必須相同)
 (Continued 續)

Vesting Scale for Leaving Service[△]
 離職歸屬表[△]

| | | | | | | | | | | | | | |
|---|--|---|---------------------|----|----|----|----|----|----|----|----|----|-----|
| Completed Year Based On 完整年期基準 | <input type="checkbox"/> Completed Years of Membership in the Participating Plan 參與計劃會籍整年期 <input type="checkbox"/> Completed Years of Service with the Employer 為僱主服務整年期 | | | | | | | | | | | | |
| Vesting Scale Option 歸屬比例選擇 (Please select an option where appropriate or specify at "Option 4") (請揀選適用的選擇或在「選擇4」註明) | Option 選擇 | | Completed Year 完整年期 | | | | | | | | | | |
| | | | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10+ |
| | 1 | % | 0 | 10 | 20 | 30 | 40 | 50 | 60 | 70 | 80 | 90 | 100 |
| | 2 | % | 0 | 0 | 0 | 30 | 40 | 50 | 60 | 70 | 80 | 90 | 100 |
| | 3 | % | 0 | 0 | 0 | 0 | 0 | 50 | 60 | 70 | 80 | 90 | 100 |
| 4 | % | | | | | | | | | | | | |

[▽] Employer confirmed that there is no reduction of any MPF accrued rights and vested benefits as a result of the transfer of benefits to the BCT (MPF) Pro Choice / BCT (MPF) Industry Choice. 僱主確認強積金的累算權利和歸屬權益並不會因利益轉移至 BCT 積金之選 / BCT (強積金) 行業計劃而有所減少。

[#] If an employee has reached the specified early retirement age and has fulfilled other conditions if specified by his employer, he shall be fully vested with the value of the balance of his employer's voluntary contribution (including the benefits transferred from ORSO scheme, if any). If the early retirement age is not specified and the employee is under the normal retirement age (if specified) or age 65 (if the normal retirement age is not specified), the percentage of the value of the balance attributable, for the purpose of vesting, to the employer's voluntary contributions (including the benefits transferred from ORSO scheme, if any) shall be calculated according to the above vesting scale. 若僱員已達到以上訂明之提早退休年齡並且已履行僱主訂明的其他條件(如有), 僱主自願性供款部份(包括從職業退休計劃轉入的權益, 如有)將全數 100% 歸屬予該僱員所有。若僱主沒有訂明提早退休年齡及僱員未滿正常退休年齡(如訂明)或未滿 65 歲(如沒有訂明正常退休年齡), 僱主自願性供款部份(包括從職業退休計劃轉入的權益, 如有)的歸屬百分比, 就歸屬的目的而言, 將依據上述之歸屬表計算。

^{###} If an employee has reached the normal retirement age (if specified) or age 65 (if the normal retirement age is not specified) (irrespective of whether the employee has ceased employment with the employer), the value of the balance of his employer's voluntary contributions (including the benefits transferred from ORSO scheme, if any) shall be fully vested in him. For the avoidance of doubt, if this field is not filled in and the employee is older than age 65, the employee shall also be fully vested with the value of the balance of his employer's voluntary contributions (including the benefits transferred from ORSO scheme, if any). 當僱員已達到正常退休年齡(如訂明)或年滿 65 歲(如沒有訂明正常退休年齡)(不論僱員是否已終止受僱), 僱主自願性供款部份(包括從職業退休計劃轉入的權益, 如有)將全數 100% 歸屬予該僱員所有。為免生疑問, 若無填寫此欄及僱員年齡大於 65 歲, 僱主自願性供款部份(包括從職業退休計劃轉入的權益, 如有)亦會全數 100% 歸屬予該僱員。

[△] (i) When an employee ceases the employment with his employer, the employee will be entitled to receive the value of his balance attributable to the member's voluntary contribution and, except for the circumstances set out under item (ii) below, a percentage of the value of the balance attributable to the employer's voluntary contributions (including the benefits transferred from ORSO scheme, if any) according to the above vesting scale. 當僱員離職時, 僱員將可獲僱員自願性供款部份及(下文第 ii 項所列情況除外)根據以上歸屬表所得出僱主自願性供款部份(包括從職業退休計劃轉入的權益, 如有)的歸屬百分比。

(ii) Each member shall become fully vested with the value of the balance of his employer's voluntary contribution (including the benefits transferred from ORSO scheme, if any) on the first of the following: 如首先符合下列任何一個情況, 僱員應可全數獲得其僱主之自願性供款部份(包括從職業退休計劃轉入的權益, 如有):

(a) Attaining Normal Retirement Age (if specified above) or age 65 (if the normal retirement age is not specified) 達到正常退休年齡(如上所訂明)或年滿 65 歲(如沒有訂明正常退休年齡)

(b) Attaining Early Retirement Age (if specified above) and fulfilling other conditions if specified by the relevant employer in relation thereto 達到提早退休年齡(如上所訂明), 僱員並且已履行僱主訂明的其他條件(如有)

(c) Termination of employment due to total incapacity 因完全喪失行為能力而終止僱用

(d) Termination of employment due to terminal illness 因罹患末期疾病而終止僱用

(e) Death 死亡

(iii) If a member is dismissed from the employment, the percentage of the value of the balance attributable to the employer's voluntary contributions (including the benefits transferred from ORSO scheme, if any) will be subject to the Employer's discretion being either zero percent (where supporting document is required, if necessary) or following the applicable percentages specified in the above vesting scale. 如成員被僱主解僱, 僱主自願性供款部份(包括從職業退休計劃轉入的權益, 如有)的歸屬百分比將由僱主決定為零(如需要請提供有關證明文件)或按照上述歸屬表適用的歸屬百分比計算。

Part III. 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 BCT (MPF) Pro Choice and / or the BCT (MPF) Industry Choice (collectively referred as the "Schemes") (concerning application records and operational records and / or their dealing / transaction details records) will only be accessed and handled by properly authorised staff of BCTC (the trustee of the Schemes), BCT Financial Limited ("BCTF", the sponsor of the Schemes) 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 Mandatory Provident Fund Schemes Ordinance ("Ordinance"); (ii) providing Mandatory 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 Mandatory Provident Fund services (and ancillary MPF products); (iii) improving the provision of Mandatory Provident Fund services by BCTC to customers generally (including the facilitation of the provision of Mandatory Provident Fund services to enable the customers of BCTC generally to access Mandatory Provident Fund (or other) account details through the internet and / or automated teller machine networks such as JETCO); (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.

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.


由 BCT 積金之選及 / 或 BCT (強積金) 行業計劃(統稱為「強積金計劃」)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(強積金計劃之受託人)、銀聯金融有限公司(「銀聯金融」, 強積金計劃之保薦人)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, 或會被使用、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任何之目的: (一) 行使或執行強制性公積金計劃條例(「條例」)下所授予或施加之職能或根據該條例的目的而行使或執行職能; (二) 提供強制性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, 及直銷強制性公積金服務(及有關強積金的產品); (三) 改善銀聯信託提供予客戶一般之強制性公積金服務(包括協助提供強制性公積金服務以令銀聯信託之客戶可於互聯網及 / 或自動櫃員機網絡例如銀通處理強制性公積金(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。

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 IV. Authorisation and Declaration 授權及聲明

- (1) I / We agree to comply with the obligations imposed on us as an employer under the Occupational Retirement Schemes Ordinance (Cap. 426) and Mandatory Provident Fund Schemes Ordinance (Cap. 485) and their related regulations, if applicable. I / We understand that the Participating Plan does not enable any person, without any consent of the Participating Plan's member concerned and any approval of the Mandatory Provident Fund Schemes Authority, to alter to the member's detriment either his accrued rights or his vested benefits under the Participating Plan. I / We also understand that such alteration can only take effect after obtaining the approval of the Mandatory Provident Fund Schemes Authority. I / We further undertake that whenever this circumstance occurs, I / we shall notify BCTC as soon as reasonably practicable for the Mandatory Provident Fund Schemes Authority's approval.
- (2) I / We understand and agree to the terms of the Personal Information Collection Statement as set out in this form.
- (3) I / We declare that to the best of my / our knowledge and belief, the information given in this form and / or its attachment(s), if any, is correct and complete.
- (4) I / We understand that I / we will be required to provide evidence required by applicable laws and regulations relating to anti-money laundering checks. If BCTC / BCTF does not receive satisfactory evidence, further documentation may be requested, and shall not be processed until such documentation is received.

- (1) 本人 / 吾等同意遵守《職業退休計劃條例》(第426章)及《強制性公積金計劃條例》(第485章)及其有關規例中作為僱主之責任之規定，如適用。本人 / 吾等明白該參與計劃的條款不會令任何人能夠未經該參與計劃的有關成員同意及任何在未經強制性公積金計劃管理局的批准下、以對該成員不利的方式更改該成員在該參與計劃下的累算權益或既有利益。本人 / 吾等並明白有關更改必須經強制性公積金計劃管理局的批准後才能生效。如有上述情況，本人 / 吾等並承諾會儘快通知銀聯信託，以便向強制性公積金計劃管理局申請批核。
- (2) 本人 / 吾等明白及同意於此表格之收集個人資料聲明條款。
- (3) 本人 / 吾等聲明，盡本人 / 吾等所知及所信，本表格及隨附文件(如有)所提供的資料均屬正確無訛且並無缺漏。
- (4) 本人 / 吾等明白如本人 / 吾等須就現行打擊清洗黑錢的有關法例及規則的要求而提供資料。倘若銀聯信託 / 銀聯金融未能收到滿意之證明，則可要求提供進一步資料，而有關交易謹在接獲有關資料後方可進行。



Signature(s) and Company Stamp (if applicable)
簽署及公司印章(如適用)

Date (D / M / Y) 日期(日 / 月 / 年)

Name 姓名 : (1) _____ (2) _____

Title 職銜 : (1) _____ (2) _____

Remark 備註

1. For New Application, this form needs to be signed by the director(s) / Sole Proprietor / Partners. 就新的申請，本表格必須需由董事 / 獨資經營者 / 合伙人士簽署。

Internal Use Only 內部專用

Date Received:

Input By:

Verified By:

Remarks: