

Form Guide for Employee Choice Arrangement (“ECA”) – Transfer Election Form

如何填寫「僱員自選安排 – 轉移選擇表格」



BCT (MPF) Pro Choice / BCT (MPF) Industry Choice BCT 積金之選 / BCT (強積金) 行業計劃 Employee Choice Arrangement (“ECA”) – Transfer Election Form 「僱員自選安排」– 轉移選擇表格

FORM: MPF(S)-P(P)

(FOR NEW TRUSTEE'S USE ONLY)
Form Received Date:
(只供新受託人填寫)
收到表格日期:

(For an employee to transfer MPF accrued benefits (benefits) from a contribution account in an MPF registered scheme (scheme) under current employment (“Original Scheme”) to an account in a scheme elected by the employee (“New Scheme”) during employment)
Sections 148A and 148B of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)
(適用於僱員在現職期間把現職的強積金註冊計劃(原計劃)供款帳戶內的強積金累積權益(權益)轉移至自選計劃(新計劃)的帳戶)
(《強制性公積金計劃(一般)規例》(第485A章)第148A及148B條)

Note 注意

- Please read the “Guide to Transfer of MPF Accrued Benefits (Benefits) under Employee Choice Arrangement (“ECA”)” (“the Guide”) before you complete this form.
填寫本表格前，請先閱讀《「僱員自選安排」強積金累積權益(權益)轉移指南》(《指南》)。
- Please complete this form in BLOCK LETTER. 請以正楷填寫本表格。
- Please send this form to the trustee of New Scheme after completion. 填妥本表格後，請交予新計劃的受託人。
- Please mark “✓” in the appropriate box. 請於適用的方格內填上“✓”號。
- 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。
- (Only applicable to the new scheme which is under trusteeship of Bank Consortium Trust Company Limited 只適用於新計劃是由銀聯信託有限公司所託管)
Please send the completed form to “Pension Services, Bank Consortium Trust Company Limited, 18/F Cosco Tower, 183 Queen’s Road Central, Hong Kong” or fax it to 2992 0507. 請將填妥表格寄往「香港皇后大道中183號中遠大廈18樓，銀聯信託有限公司，退休金服務」收或傳真至2992 0507。

Please select your Participating Plan.
請選擇參加計劃名稱。

Part I. Details of The Scheme Member 計劃成員資料					
Name of Plan 計劃名稱	<input checked="" 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				
Name of Scheme Member ^{Note 1} 計劃成員姓名 ^{註1} (as shown on your Hong Kong Identity (HKID) Card ^{Note 1}) (與您的香港身份證上的姓名相同 ^{註1})	English (Mr / Ms / Mrs*) Chan Tai Man	HKID Card No. 香港身份證號碼 A123456(7)	Passport No. (<i>ONLY</i> for scheme member without HKID Card) 護照號碼(本欄僅供沒有香港身份證的計劃成員填寫)		
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	
Local Mobile 本地手提			9 0 0 0 0 0 0 1		
Business 辦公室			2 2 9 8 9 3 3 3		
Residential 住宅			2 2 9 8 9 3 3 2		
China / Overseas 中國 / 海外					
E-mail Address 電郵地址	taiman@yahoo.com.hk				
Correspondence Address (all correspondence will be sent to the following address) 通訊地址(所有通訊將寄往以下地址) Flat A, 10/F, Blk 2, Cosco Building, 183 Queen’s Road, Sheung Wan, Hong Kong					

Please fill in your Personal Information.
請填寫個人資料。

Please fill in your contact details.
請填寫聯絡資料。

Part II. Contribution Account Information In Original Scheme 原計劃的供款帳戶資料	
Details of the MPF Scheme from which your Benefits are to be Transferred 轉出您的權益的強積金計劃帳戶資料	
Name of Original Scheme ^{Note 2} 原計劃名稱 ^{註2}	ABC Mandatory Provident Fund
Scheme Member Account No. ^{Note 2} 計劃成員帳戶號碼 ^{註2}	3401266754
Employer’s Identification No. ^{Notes 2 & 3} (Participating Plan No.) 僱主識別號碼 ^{註2及註3} (參與計劃編號)	199999

* Delete as appropriate 請刪去不適用者

Plan Sponsor 計劃保薦人: BCT Financial Limited 銀聯金融有限公司
Trustee & Administrator 受託人及行政管理人: Bank Consortium Trust Company Limited 銀聯信託有限公司

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Please fill in the information of the Original Scheme. The relevant information has been stated in the “Notice of Participation” or “Member Benefit Statement (Annual)”. If you have any query, please contact your Original Trustee. 請填寫原計劃資料，有關資料已詳列於「參與通知」或「成員權益報表(周年)」，如有疑問，請聯絡您的原受託人。

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Part III. Transfer of Benefits ^{Note 4} 轉移權益 ^{註4}

Please indicate the part(s) of benefits in your contribution account of Original Scheme that you wish to transfer out to another MPF account.
Please select either option (a) or (b) and “✓” as appropriate.
請註明您擬把原計劃供款帳戶內哪部分的權益轉移至另一個強積金帳戶。
請選擇 (a) 或 (b)，並於適當方格內填上「✓」號：

(a) **Transfer ALL Benefits 轉移全部權益**

I wish to transfer **ALL** the benefits comprising the following parts from my contribution account of Original Scheme as its governing rules permit:

本人擬在管限規則准許下轉移原計劃供款帳戶內以下**全部**權益：

- Employee mandatory contributions in **current** employment ^{Notes 5 & 6} 現職期間的僱員強制性供款 ^{註5及註6}
- Employee voluntary contributions in **current** employment ^{Notes 7 & 8} 現職期間的僱員自願性供款 ^{註7及註8}
- Mandatory contributions that have been transferred into the contribution account and are attributable to **former** employment(s) ^{Note 9}
以往工作所累積並已轉移至供款帳戶的強制性供款 ^{註9}
- Voluntary contributions that have been transferred into the contribution account and are attributable to **former** employment(s) ^{Notes 8 & 10}
以往工作所累積並已轉移至供款帳戶的自願性供款 ^{註8及註10}

Please transfer the benefits to the following personal account:
請把權益轉移至以下個人帳戶：

Name of New Scheme ^{Note 11} 新計劃名稱 ^{註11}	<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 <input type="checkbox"/> Others 其他 (Please specify 請註明)
Scheme Member Account No. ^{Note 11} 計劃成員帳戶號碼 ^{註11}	

OR

(b) **Transfer Part(s) of Benefits 轉移部分權益**

I wish to transfer the following **part(s)** of the benefits from my contribution account of Original Scheme as its governing rules permit: (you may select one or more parts below and “✓” as appropriate)
本人擬在管限規則准許下轉移原計劃供款帳戶內以下**部分**權益：(您可選擇轉移以下其中一部分或多個部分，請於適當方格內填上「✓」號)

Benefits to be transferred from Original Scheme 由原計劃轉出的權益	Type of account receiving the benefits 接收權益 的帳戶類別
<input type="checkbox"/> Employee mandatory contributions in current employment ^{Notes 5 & 6} 現職期間的僱員強制性供款 ^{註5及註6}	} Personal account only 只限個人帳戶
<input type="checkbox"/> Employee voluntary contributions in current employment ^{Notes 7 & 8} 現職期間的僱員自願性供款 ^{註7及註8}	
<input type="checkbox"/> Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s) ^{Note 9} 以往工作所累積並已轉移至供款帳戶的強制性供款 ^{註9}	} Personal account or Contribution account 個人帳戶 或 供款帳戶
<input type="checkbox"/> Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s) ^{Notes 8 & 10} 以往工作所累積並已轉移至供款帳戶的自願性供款 ^{註8及註10}	

Please transfer the benefits selected above to the following account:
請把上述選擇的權益轉移至以下帳戶：

Name of New Scheme ^{Note 11} 新計劃名稱 ^{註11}	<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 <input type="checkbox"/> Others 其他 (Please specify 請註明)
Account Type ^{Note 11} 帳戶類別 ^{註11} (Select one only* and “✓” as appropriate) (只可選擇一項*，請於適當方格內填上「✓」號)	<input type="checkbox"/> Personal account 個人帳戶 or 或 <input type="checkbox"/> Contribution account (Employer’s Identification No. ^{Notes 3 & 11} ; 供款帳戶 (僱主識別號碼 ^{註3及註11} :)
Scheme Member Account No. ^{Note 11} 計劃成員帳戶號碼 ^{註11}	

* If you wish to transfer different parts of benefits from your contribution account to different MPF accounts, please fill in a separate FORM: MPF(S)-P(P) for each MPF account that receives the benefits.
 * 如欲把供款帳戶內不同部分的權益轉移至不同的強積金帳戶，請就每個將會接收該等權益的強積金帳戶分別填寫一份第MPF(S)-P(P)號表格。

If you select to have all your benefits transferred to another MPF Personal Account, please mark “✓” in the box and complete this section. 如選擇將全部權益轉移至另一個強積金內的個人帳戶，請在方格內加上“✓”號及填寫此部份。

If you wish to transfer a portion of your benefits to another MPF Personal Account or Contribution Account, please mark “✓” in the box and fill in the Name of the New Scheme, Account Type and Scheme Member Account No.. 如欲將部分權益轉移至另一個強積金內的個人帳戶或供款帳戶，請在適當方格內加上“✓”號及填寫新計劃名稱、帳戶類別及計劃成員帳戶號碼。

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Important Notes 重要提示

- If the account that to be transferred, which contains investment in Default Investment Strategy [“DIS”] and there is one or more of other transaction(s) is being processed, the annual de-risking of investment in DIS will be DEFERRED, it normally takes place on the next available dealing day after completion of such transaction(s); and vice versa.
若轉移權益帳戶當中的投資含有預設投資策略(「預設投資」)而帳戶有一個或超過一個的其他交易正在執行中，該週年降低投資於預設投資風險的指示將順延執行，一般在該等交易完成後下一個交易日執行；反之亦然。
- (Only applicable when the transfer is within the same MPF scheme of Bank Consortium Trust Company Limited) If the account that to be transferred, which contains investment in DIS; the annual de-risking of investment in DIS will be executed BEFORE the unit transfer in specie from one account to another account within the same MPF scheme if both transactions fall on the same day.
(只適用於權益轉移至銀聯信託有限公司內同一強積金計劃)若轉移權益帳戶當中的投資含有預設投資，該週年降低投資於預設投資風險的指示將會在同一強積金計劃中從一帳戶轉移單位至另一帳戶前執行，當兩者交易日適逢同一天。

Part IV. Authorisation 授權 (Please 請「✓」)

(Only applicable to fund transfer to BCT (MPF) Pro Choice or BCT (MPF) Industry Choice
只適用於資金轉移至BCT積金之選或BCT(強積金)行業計劃)

- I authorise Bank Consortium Trust Company Limited (“BCTC”) to obtain the necessary information in respect of my MPF account(s) from the Original trustee, and the Original trustee to release such information to BCTC. Should there be any incomplete or incorrect information in Part II above, I also authorise BCTC to make any necessary amendment(s) to that part pursuant to the information provided by the Original trustee in respect of my MPF account(s).

I further authorise BCTC to provide a copy of my identification document to the Original trustee if it is so required and solely for the purpose of processing this transfer (You may choose to attach a copy of your identification document in order for BCTC to pass it to the Original trustee if it is so required).

本人授權銀聯信託有限公司(「銀聯信託」)向原受託人索取有關本人之強積金帳戶的所需資料，並授權原受託人向銀聯信託發放有關資料。若於本表格第II部的資料有任何遺漏或錯誤，本人授權銀聯信託根據原受託人所提供的強積金帳戶資料作出必須的修正。

本人亦授權銀聯信託於有需要的情況下向原受託人提供本人身份證明文件的副本，以達至處理是次轉移的目的(您亦可選擇提交身份證明文件副本，讓銀聯信託於有需要的情況下將之轉交予原受託人)。

Part V. 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, 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 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.

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列任何之目的：(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、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或其他途徑處理強制性公積金(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。

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Part VI. Authorisation and Declaration 授權及聲明

I hereby give consent to the trustee of New Scheme and the Mandatory Provident Fund Schemes Authority (“MPFA”) to disclose information supplied by me in support of this election of transfer to the trustee(s) concerned, and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.

I confirm and declare that:

- (1) I have read and understood the Explanatory Notes and the Guide, and have voluntarily elected to transfer my MPF benefits in accordance with this form.
- (2) At the date of submitting this form, I am employed by the employer in relation to the contribution account in Original Scheme.
- (3) I understand and agree that the personal data to be supplied in support of this election of transfer are to be used for processing my election of transfer. The personal data I supply may, for such purpose, be transferred to the trustee(s) concerned, the relevant service provider(s), and the government of regulatory bodies including the MPFA.
- (4) I undertake that if there is any change in the information so provided, I shall notify BCTC as soon as reasonably practicable.
- (5) To the best of my knowledge and belief, the information given in this form is correct and complete.
- (6) 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 email.

本人同意，新計劃的受託人及強制性公積金計劃管理局（「積金局」）可為處理本人的轉移申請，向相關受託人及相關服務提供者披露本人就此項轉移申請提供的資料，或使該等機構 / 人士能夠取覽或披露該等資料。

本人確認及聲明：

- (1) 本人已閱讀及明白註釋及《指南》的內容，並自願選擇按照本表格轉移強積金權益。
- (2) 在提交本表格當日，本人受僱於為本人開立原計劃供款帳戶的僱主。
- (3) 本人明白及同意就此項轉移申請提供的個人資料，將用作處理本人的轉移申請。本人提供的個人資料可能會為該目的而轉交相關受託人、相關服務提供者、以及政府或規管機構，包括積金局。
- (4) 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。
- (5) 盡本人所知所信，本表格所提供的資料均屬正確無訛且無缺漏。
- (6) 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。儘管以上所述，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。

Man



Signature of Applicant (in the same specimen of previous service provider)^{Note 12}

申請人簽署（簽署式樣須與前服務提供者相同）^{註12}

01 / 01 / 2020

Date (D / M / Y) 日期(日 / 月 / 年)

Your signature must be the same as the one held in the record of the Original Trustee.
請確保此簽署跟原受託人的記錄相同。

Please fill in the completion date of this Form.
請填寫填表日期。

Internal Use Only 內部專用

Date Received: _____ Processed By: () Approved By: () Remarks: _____

Broker Code: _____ Agent Code: _____ Campaign Code: _____ BD Code: _____

18/F Cosco Tower, 183 Queen's Road Central, Hong Kong
香港皇后大道中183號中遠大廈18樓

Member Hotline 成員熱線 : 2298 9333
Employer Hotline 僱主熱線 : 2298 9388

Fax 傳真 : 2992 0507
Website 網址 : www.bcthk.com