Form Guide for Request for Fund Transfer Form (for self-employed person, personal account holder or employee ceasing employment)
如何填寫「資金轉移表格(適用於自僱人士、個人帳戶持有人或終止受僱的僱員)」

FORM: RFT (MEM)

BCT (MPF) Pro Choice / BCT (MPF) Industry Choice
BCT積金之選 / BCT(強積金)行業計劃
Request for Fund Transfer Form (for self-employed person, personal account holder or employee ceasing employment)
資金轉移表格(適用於自僱人士、個人帳戶持有人或終止受僱的僱員)
Sections 145, 146, 147, 148 and 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)
《強制性公積金計劃(一般)規例》(第485A章)第145、146、147、148及149條

Note 注意
(i) Please complete this form in BLOCK LETTER. 請以正楷填寫本表格。
(ii) Upon completion of this form, scheme member may give this form to (excluding the Explanatory Notes)
計劃成員填妥本表格後,可把表格交予(「註釋」無須提交):

Original Trustee 原受託人	:	For election to have the benefits retained in the current master trust scheme or industry scheme. 適用於把權益保留在現行集成信託計劃或行業計劃的選擇。
New Employer 新僱主	:	For election to have the benefits transferred to the contribution account in which the new employer is participating. The new employer should then give written notice of the election to the new trustee concerned. 適用於把權益轉移至新僱主參與的供款帳戶內的選擇。新僱主隨後應給予有關新受託人該選擇的書面通知。
New Trustee 新受託人	:	For election to have the benefits transferred to another master trust scheme or industry scheme elected by the scheme member. 適用於把權益轉移至計劃成員選擇的另一集成信託計劃或行業計劃的選擇。

(iii) Please read the explanatory notes carefully before completing this form.
填寫此表格前,請先細閱註釋。
(iv) Members should note that investment markets could fluctuate significantly. Fund prices may go down as well as up. There is no guarantee that, given the time required to implement voluntary contribution withdrawal instructions, such instructions will achieve your desired results. Please carefully consider your own risk tolerance level and financial circumstances (as well as your own retirement plan) before making any investment choices. If in doubt, please contact your independent financial advisor for further details.
成員必須注意投資市場可能出現顯著的波動,基金單位價格可跌可升。由於處理有關提取自願性供款指示需要一定的時間,因此未必能夠保證達到您預期的結果。在作出投資選擇前,您必須小心衡量個人可承受風險的程度及財政狀況(包括您的退休計劃)。如有任何疑問,請諮詢您的獨立財務顧問了解更多詳情。
(v) 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。
(vi) Please mark "✓" in the appropriate box. 請於適用的方格內填上「✓」號。
(vii) (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。

Part I. Details of The Scheme Member 計劃成員資料

Name of Plan 計劃名稱	☑ **BCT (MPF) Pro Choice BCT積金之選**		
	☐ **BCT (MPF) Industry Choice BCT(強積金)行業計劃**		
Name of Scheme Member 計劃成員姓名 (as that shown on your 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)*
	中文 (先生 / ~~女士~~ / ~~太太~~*) *陳大文*	Passport No. (*ONLY* 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			*90000001*	
Business 辦公室			*22989333*	
Residential 住宅			*22989332*	
China / Overseas 中國 / 海外				
E-mail Address 電郵地址	*taiman@yahoo.com.hk*			
Correspondence Address 通訊地址	*Flat A, 10/F, Blk 2, Cosco Building, 183 Queen's Road, Sheung Wan, Hong Kong*			

* Delete as appropriate 請刪去不適用者

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

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。

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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Form Guide for Request for Fund Transfer Form (for self-employed person, personal account holder or employee ceasing employment)
如何填寫「資金轉移表格(適用於自僱人士、個人帳戶持有人或終止受僱的僱員)」

FORM: RFT (MEM)

Part II. Transfer Information 轉移資料

A. MPF account information in the Original Scheme Note 2
原計劃的強積金帳戶資料 註2

Name of Original Trustee Note 2 原受託人名稱 註2	***ABC Trustee (Hong Kong) Limited***
Name of Original Scheme Note 2 原計劃名稱 註2	***ABC Mandatory Provident Fund***

Type of MPF Account *(Please select ONE of the following accounts and "✓" as appropriate)*:
強積金帳戶類別*(請選擇以下其中一個帳戶,並於適當方格內填上「✓」號)*:

☐ Personal Account 個人帳戶 OR 或 ☑ Contribution Account 供款帳戶

Scheme Member's Account No. Note 2
計劃成員帳戶號碼 註2 ***199999-123***

B. Details of former employment (applicable for employee who wishes to transfer-out the benefits from a contribution account after cessation of employment):
以往受僱詳情(適用於僱員在終止受僱後欲把供款帳戶內的權益轉出):

Name of Former Employer 前任僱主名稱	***Outlet Company Limited***
Employer's Identification No. Note 3 (Participating Plan No.) 僱主識別號碼 註3 (參與計劃編號)	***199999***

C. Details of self-employed status (applicable for self-employed person only):
自僱人士身份詳情(只適用於自僱人士):

Please indicate your reason of transfer and "✓" as appropriate: 請於適當方格內填上「✓」號,表明申請轉移的原因:

☐ Cessation of self-employment, with effect from:
終止自僱,生效日期是:

DD 日	MM 月	YYYY 年
23	*11*	*2021*

☐ I will remain in self-employment and my benefits will be transferred to another scheme stated in Part III. Contributions to the original scheme should be paid up to:
本人將會維持自僱,並把本人的權益轉移至第III部份所述的另一個計劃。本人向原計劃供款的最後日期是:

DD 日	MM 月	YYYY 年

Part III. Transfer Options 轉移選擇

Important Note 重要提示
Item (1) below is required information for processing your instruction. 下列第(1)項必須填寫,否則將無法處理有關指示。

(1) MPF account information in the New Scheme 新計劃的強積金帳戶資料
I elect to transfer the benefits derived from mandatory contributions in my account stated in Part IIA to the following account (Please select option (a), (b) OR (c) and "✓" as appropriate):
本人選擇把在第IIA部所述帳戶內由強制性供款所產生的權益轉移至以下帳戶(請選擇(a)、(b)或(c),並於適當方格內填上「✓」號):

☑ (a) **To my contribution account with my New Employer** 轉移至本人新僱主為本人開立的供款帳戶

Name of New Trustee Note 4 新受託人名稱 註4
☐ **Bank Consortium Trust Company Limited** 銀聯信託有限公司
☐ **Others** 其他 **(Please specify** 請註明**)** ______

Name of New Scheme Note 4 新計劃名稱 註4
☐ **BCT (MPF) Pro Choice** BCT積金之選
☐ **BCT (MPF) Industry Choice** BCT(強積金)行業計劃
☐ **Others** 其他 **(Please specify** 請註明**)** ______

Scheme Member's Account No. Note 4 計劃成員帳戶號碼 註4 ______
Name of New Employer 新僱主名稱 ______
Employer's Identification No. Note 3 (Participating Plan No.) 僱主識別號碼 註3 (參與計劃編號) ______

☐ (b) **To my designated account in the new scheme** 轉移至本人新計劃內的指定帳戶

Name of New Trustee Note 4 新受託人名稱 註4
☐ **Bank Consortium Trust Company Limited** 銀聯信託有限公司
☐ **Others** 其他 **(Please specify** 請註明**)** ______

Name of New Scheme Note 4 新計劃名稱 註4
☐ **BCT (MPF) Pro Choice** BCT積金之選
☐ **BCT (MPF) Industry Choice** BCT(強積金)行業計劃
☐ **Others** 其他 **(Please specify** 請註明**)** ______

Scheme Member's Account No. Note 4 計劃成員帳戶號碼 註4 ______

☐ (c) **Retain in the original scheme as personal account (if applicable)** 以個人帳戶形式保留在原計劃(如適用)

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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。

Please select the Type of MPF Account in the Original Scheme.
請選擇原計劃的戶口類別。

If the account in the Original Scheme is a Contribution Account, please fill in the information of your former employer, and his / her Employer's Identification No..
如在原計劃的帳戶屬供款帳戶,請填寫前僱主資料及僱主的識別號碼。

If you are a Self-employed Person in the Original Scheme, please fill in this section.
如您以自僱人士身份參加原計劃,請填寫此部份。

Please select fund transfer options and provide account information.
請選擇轉入戶口類別及提供戶口資料。

Form Guide for Request for Fund Transfer Form (for self-employed person, personal account holder or employee ceasing employment)
如何填寫「資金轉移表格(適用於自僱人士、個人帳戶持有人或終止受僱的僱員)」

FORM: RFT (MEM)

Part III. Transfer Options 轉移選擇 (Continued 續)

(2) Arrangement of my voluntary contributions Note 5 (if any) in my account stated in Part IIA.
有關本人在第IIA部所述帳戶內的自願性供款 註5 (如有) 的安排。

I elect to have the benefits derived from voluntary contributions to be:
本人選擇把由自願性供款所產生的權益作出以下的安排：

☑ (a) Transferred together with the benefits derived from the mandatory contributions as in Part III (1)
與在第III (1)部所述由強制性供款所產生的權益一併轉移

☐ (b) withdrawn in accordance with the governing rules of the original scheme. The payment will be sent to your correspondence address stated in Part I by cheque.
按照原計劃的管限規則提取權益，款項將以支票形式寄往您於第I部所提供之通訊地址。

I attach a photocopy of my HKID Card / Passport* for verification of the HKID Card / Passport* No. so that I do not need to present my HKID Card / Passport* in person for verification.
本人現附上香港身份證 / 護照*的副本以供核實本人的香港身份證 / 護照*號碼，本人因此毋須為受託人的核對工作親身出示香港身份證 / 護照*。

Remarks 備註
If you do not select any options but there are benefits derived from voluntary contributions, those benefits will be handled in the same way as those stated in Part III(1). If there are no such benefits in your account and you have made an election in Part III(2), the selected option will not be processed.
如您沒有作出任何選擇，而帳戶內有由自願性供款所產生的權益，則該等權益將以處理第III(1)部所述權益的同樣方式處理。如您已在第III(2)部作出選擇，而帳戶內並沒有該等權益，則有關選擇將不會獲處理。

* Delete as appropriate 請刪去不適用者

If there are benefits derived from Voluntary Contribution in the Original Scheme, please specify in this section to indicate how you would like them to be arranged.
如於原計劃有由自願性供款所產生的權益，請在此部份填寫處理方法。

Important Notes 重要提示

- If the account that to be transferred, which contains investment in DIS, the annual de-risking of investment in DIS will NOT be executed, when the benefits are being transferred out to another registered scheme or withdrawn in lump sum. 若轉移權益帳戶當中的投資含有預設投資，當該帳戶的權益正待轉移至其他註冊計劃或全數提取，該週年降低投資於預設投資風險的指示將不會執行。
- If the account that to be transferred, which contains investment in 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 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 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. Termination of MPF Account with No Residual Balance (if applicable)
終止沒有剩餘款項的強積金帳戶(如適用)

I hereby give the original trustee an instruction to terminate my relevant MPF member account as referred to in Part IIA upon transfer of the full benefits to the new trustee and there is no residual balance in the said account.
本人謹此指示原受託人，在把本人於第IIA部所述的強積金成員帳戶內的所有權益轉移至新受託人後，以及在該帳戶內並無剩餘款項的情況下，終止該強積金成員帳戶。

Part V. 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 IIA 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).
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須資料，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A項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。
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)。

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If you do not select any options but there are benefits derived from Voluntary Contributions, those benefits will be handled in the same way as that of mandatory contributions which will be transferred to your Contribution Account / designated MPF Account selected in Part III (1).
如於原計劃有自願性權益，但沒有填寫此部份作出安排，有關由自願性供款所產生的權益將會與強制性權益一併轉移到您於第III(1)部所選擇的供款帳戶 / 指定強積金帳戶內。

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如何填寫「資金轉移表格(適用於自僱人士、個人帳戶持有人或終止受僱的僱員)」

FORM: RFT (MEM)

Part VI. 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.

由BCT積金之選及 / 或BCT (強積金) 行業計劃(統稱為「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(計劃之受託人)、銀聯金融有限公司(「銀聯金融」,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。

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 VII. Authorisation and Declaration 授權及聲明

(1) I have read and understood the Notes to Transfer of MPF Accrued Benefits (Benefits) by Scheme Member and the Explanatory Notes.
本人已閱讀及明白《計劃成員轉移強積金累算權益(權益)須知》及註釋的內容。

(2) I hereby give consent to the new trustee and the 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.
本人同意,新受託人及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。

(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 or regulatory bodies including the MPFA.
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、以上政府或規管機構,包括積金局。

(4) 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。

(5) I declare that to the best of my knowledge and belief, the information given and statements made in this form and its attachments, if any, are true, correct and complete.
本人聲明,盡本人所知所信,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。

(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.
本人同意銀聯信託不論在有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 S.V.

Signature of Scheme Member (in the same specimen of previous service provider) Note 6
計劃成員簽署(簽署式樣須與前服務提供者相同) 註6

23 / 11 / 2021

Date (D / M / Y) 日期(日 / 月 / 年)

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

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

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

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FORM: RFT (MEM)

Request for Fund Transfer Form (for self-employed person, personal account holder or employee ceasing employment) [FORM: RFT (MEM)]

NOTES TO TRANSFER OF MPF ACCRUED BENEFITS (BENEFITS) BY SCHEME MEMBER 計劃成員轉移權益須知

Please read the following **important notes** before completing this form. 填寫本表格前，請先閱讀下列**重要資料**。

- **Definition of terms 用詞定義：**

I. "Contribution account" 「供款帳戶」	–	an account in an MPF registered scheme (scheme) which is mainly used to receive MPF contributions (both employer and employee portions) made by an employer for an employee and on behalf of the employee or by a self-employed person. 指強積金註冊計劃(計劃)下主要用以接收僱主為僱員所作出以及代表僱員所作出的強積金供款(包括僱主及僱員部分)或自僱人士所作出的強積金供款的帳戶。
II. "Personal account" 「個人帳戶」	–	an account in a scheme which is mainly used to receive the benefits transferred from another contribution or personal account. 指計劃下主要用以接收由另一供款或個人帳戶轉入的權益的帳戶。
III. "Original trustee" 「原受託人」	–	(also known as "transferor trustee" in the Mandatory Provident Fund Schemes (General) Regulation ("the Regulation") – the trustee of a scheme from which your benefits are to be transferred. 在《強制性公積金計劃(一般)規例》(《規例》)中亦稱「轉移受託人」– 指轉出您的權益的計劃的受託人。
IV. "New trustee" 「新受託人」	–	(also known as "transferee trustee" in the Regulation) – the trustee of a scheme to which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same scheme or to another scheme under the same trustee, the new trustee on FORM: RFT(MEM) will be the same as the original trustee. 在《規例》中亦稱「承轉受託人」– 指轉入您的權益的計劃的受託人。如您選擇把權益轉移至同一計劃的另一個帳戶或轉移至同一受託人的另一個計劃，在表格：RFT (MEM)所指的新受託人將與原受託人相同。
V. "Original scheme" 「原計劃」	–	the scheme from which your benefits are to be transferred. 指轉出您的權益的計劃。
VI. "New scheme" 「新計劃」	–	the scheme to which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same scheme, the new scheme on FORM: RFT(MEM) will be the same as the original scheme. 指轉入您的權益的計劃。如您選擇把權益轉移至同一計劃的另一個帳戶，在表格：RFT (MEM)表格所指的新計劃將與原計劃相同。

- If you are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that guaranteed fund may result in some or all of the guarantee conditions not being satisfied; thus affecting your entitlement to the guarantee. Please check the offering document of the original scheme or consult your original trustee for details. 如您現時投資於強積金保證基金，從該保證基金轉出權益，可能會導致您不符合部分或所有保證條件，以致影響您享有保證的資格。詳情請查閱原計劃的要約文件，或向原受託人查詢。
- If you wish to transfer your benefits from one scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy (DIS) if you either (i) do not give or have not given any investment instructions for the account to your new trustee or (ii) have given investment instructions for the account to invest benefits according to the DIS. Please approach your new trustee to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in the new scheme, please also approach the new trustee. 如欲把權益從一個計劃轉移至另一個計劃，請留意轉入帳戶的權益將會如何投資。一般而言，如您(i)沒有或尚未就有關帳戶向您的新受託人給予任何投資指示；或(ii)已就有關帳戶給予投資指示，要求把權益按照預設投資策略投資，則轉入該帳戶的權益將按照預設投資策略投資。如有需要，請向新受託人查詢詳情。如欲就新計劃的帳戶更改或給予投資指示，亦請聯絡新受託人。
- If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the DIS of the scheme, you should be aware that the de-risking mechanism of the DIS starts at the age of 50. If the annual de-risking of your investment in the DIS and your transfer request take place at around the same time, the trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant trustee(s) if you wish to know the details of how the trustee(s) will handle these transactions. 如您已年滿或快將年滿50歲，而現時您的權益是按照計劃的預設投資策略投資，請留意預設投資策略的降低投資風險機制，會由計劃成員年滿50歲開始運作。如計劃的受託人在預設投資策略下按年降低您的投資風險的時間，與接獲您的轉移權益申請的時間相當接近，該計劃的受託人將根據其運作程序及在符合《強制性公積金計劃條例》規定的情況下，訂定處理降低風險及轉移權益的次序。如欲瞭解受託人如何處理該等交易，請向相關受託人查詢詳情。
- Please ensure that you have a personal account or a contribution account in the new scheme. Otherwise, you have to enroll in that scheme before you submit FORM: RFT (MEM) to the new trustee. 請確保您在新計劃已開立個人帳戶或供款帳戶。否則，您須先行登記參加該計劃，然後才向新受託人提交表格：RFT (MEM)。
- If you wish to transfer-out the benefits from more than one accounts, you should submit a separate FORM: RFT (MEM) for each of those accounts. 如欲從多於一個帳戶轉出權益，請就每個帳戶分別提交一份表格：RFT (MEM)。
- If you wish to transfer-out the benefits from your contribution account during employment, you should complete "Employee Choice Arrangement ("ECA") – Transfer Election Form" [FORM: MPF(S)-P(P)]. 如欲在現職期間從您的供款帳戶轉出權益，請填寫「僱員自選安排」– 轉移選擇表格 [表格：MPF(S)-P(P)]。
- For each account, a scheme member should transfer the entirety of his benefits therein in a lump sum except the part of the benefits derived from voluntary contributions which the scheme member may elect to withdraw in accordance with the governing rules of the original scheme. 就每一個帳戶，除了由自願性供款所產生的權益或可根據原計劃管限規則選擇提取外，計劃成員應把帳戶內的所有權益整筆轉移。
- In order to prevent a third party from filling in incorrect information, please DO NOT sign on a blank form. After the completed FORM: RFT (MEM) has been received by the new trustee, the administration procedures taken by the trustees may not be reversible. 為免被第三者填上不正確的資料，請勿在空白的表格上簽署。在新受託人收到已填妥的表格：RFT (MEM)後，之前由受託人採取的行政步驟未必能夠撤銷。
- If any information provided on FORM: RFT (MEM) (including the signature) is incorrect or incomplete, the trustees may not be able to process your benefit transfer request. 若您在表格：RFT (MEM)上提供的任何資料(包括簽署)不正確或不完整，受託人可能無法處理您的權益轉移要求。
- Please refer to the publication of the Mandatory Provident Fund Schemes Authority (MPFA) available from the MPFA website (www.mpfa.org.hk) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment. 有關選擇計劃時各項考慮因素及強積金投資的潛在風險，請參閱強制性公積金計劃管理局(積金局)網站(www.mpfa.org.hk)的相關宣傳刊物。
- Information about the new scheme is set out in the offering document of that scheme. This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the relevant trustee for enquiries about account details and information on specific schemes or funds. 新計劃的要約文件載有該計劃的資料，這些資料將有助您決定是否把權益轉移至該計劃。如欲查詢帳戶詳情及個別計劃或基金的資料，請聯絡相關受託人。
- If you wish to make enquiries or seek assistance in relation to your election to transfer benefit, please contact your original trustee or new trustee. For general enquiries regarding benefits transfer, you may contact the MPFA via e-mail: mpfa@mpfa.org.hk or hotline: 2918 0102. 如欲就您的權益轉移申請作出查詢或尋求協助，請聯絡您的原受託人或新受託人。有關權益轉移的一般查詢，可聯絡積金局(電郵地址：mpfa@mpfa.org.hk或熱線電話：2918 0102)。

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Form Guide for Request for Fund Transfer Form (for self-employed person, personal account holder or employee ceasing employment)
如何填寫「資金轉移表格(適用於自僱人士、個人帳戶持有人或終止受僱的僱員)」

FORM: RFT (MEM)

Request for Fund Transfer Form (for self-employed person, personal account holder or employee ceasing employment) [FORM: RFT (MEM)]

Explanatory Notes

1. If you do NOT possess a HKID Card, please fill in your name as shown on your passport.

2. The transfer request may not be processed if the name of the original trustee, the name of the original scheme, your scheme member's account no. in the original scheme, type of MPF account, the name of your former employer or the employer's identification no. is not provided or is incorrect. This information can be found:

   I. in your Member Certificate / Notice of Acceptance, or Notice of Participation; or
   II. in your Member Benefits Statement (Annual), or other statements provided by the trustee; or
   III. through the member enquiry facilities available from the trustees.

   If you are in doubt, please contact your original trustee or your employer.

3. The employer's identification no. is the no. assigned by the trustee to the employer concerned. Trustees may use different names for this no. (e.g. account no., company code, contract no., employer account no., employer code, employer ID, employer no., MPF client no., participating plan no., plan no., scheme no., scheme ID, sub-scheme no.). The no. can be found in the statements issued by the trustees or through the member enquiry facilities available from the trustee. If you are in doubt, please contact your trustee or your employer.

4. The transfer request may not be processed if the name of the new trustee, the name of the new scheme or your scheme member's account no. in the new scheme is not provided or is incorrect. The information can be found:

   I. in your Member Certificate / Notice of Acceptance, or Notice of Participation; or
   II. in your Member Benefits Statement (Annual), or other statements provided by the trustee; or
   III. through the member enquiry facilities available from the trustee.

   You may, however, leave the scheme member's account no. blank if you have recently enrolled in the scheme and have not been notified of the new account no.. If you are in doubt, please contact your new trustee.

5. A scheme member can check whether his existing MPF account contains any benefits derived from voluntary contributions from his Member Benefits Statement (Annual) issued by the original trustee to the scheme member. The scheme member can also check this information through the member enquiry facilities available from the trustees. If you are in doubt, please contact your original trustee.

6. The signature must be the same as your specimen signature previously given to your original trustee. Please note that the transfer may not be processed if the signature provided in this form does not match your specimen signature previously given to your original trustee. If you are in doubt, please contact your original trustee.

資金轉移表格(適用於自僱人士、個人帳戶持有人或終止受僱的僱員) [表格：RFT (MEM)]

註釋

1. 如您沒有香港身份證，請填上您在護照上的姓名。

2. 如您沒有提供原受託人名稱、原計劃名稱、原計劃成員帳戶號碼、強積金帳戶類別、前任僱主名稱或僱主識別號碼，或所提供的資料有誤，則此項轉移要求或不獲處理。您可透過以下途徑獲取有關資料：

   I. 查閱成員證明書、接納通知或參與通知；或
   II. 查閱成員權益報表(周年)或受託人提供的其他報表；或
   III. 受託人提供的成員查詢服務。

   如有疑問，請聯絡您的原受託人或僱主。

3. 僱主識別號碼即受託人為有關僱主編配的號碼。受託人或會使用不同名稱來設定此號碼(例如帳戶編號、僱主編號、合約編號、強積金客戶編號、參與計劃編號、計劃編號、附屬計劃編號)。您可查閱受託人發出的報表或透過受託人提供的成員查詢服務獲取該號碼。如有疑問，請聯絡您的受託人或僱主。

4. 如您沒有提供新受託人名稱、新計劃名稱或新計劃成員帳戶號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。您可透過以下途徑獲取有關資料：

   I. 查閱成員證明書、接納通知或參與通知；或
   II. 查閱成員權益報表(周年)或受託人提供的其他報表；或
   III. 受託人提供的成員查詢服務。

   不過，如您最近才參加計劃，並未獲悉新的成員帳戶號碼，則可留空此項。如有疑問，請聯絡您的新受託人。

5. 計劃成員可在原受託人向計劃成員發出的成員權益報表(周年)上，獲知其現有強積金帳戶內是否有由自願性供款所產生的權益。計劃成員亦可透過受託人提供的成員查詢服務查核這項資料。如有疑問，請聯絡您的原受託人。

6. 您的簽署必須與您之前給予原受託人的簽署式樣相同。請注意，若本表格上的簽署與您之前給予原受託人的簽署式樣不符，有關轉移或不獲處理。如有疑問，請聯絡您的原受託人。

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