



INVESCO STRATEGIC MPF SCHEME 景順強積金策略計劃  
SCHEME MEMBER'S REQUEST FOR FUND TRANSFER FORM  
(FOR SELF-EMPLOYED PERSON, PERSONAL ACCOUNT HOLDER OR EMPLOYEE CEASING EMPLOYMENT)  
計劃成員資金轉移申請表  
(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 (Cap485A)  
《強制性公積金計劃（一般）規例》（第 485A 章）第 145、146、147、148 及 149 條

Please note 請注意:

- PLEASE READ THE EXPLANATORY NOTES AND THE "NOTES TO TRANSFER OF MPF ACCRUED BENEFITS (BENEFITS) BY SCHEME MEMBER" CAREFULLY BEFORE COMPLETING THIS FORM. 填報本申請表前，請先細讀註釋及《計劃成員轉移強積金累算權益(權益)須知》。
- Please complete the Form from page 1 to page 4 and submit it (excluding the Explanatory Notes and the "Notes to Transfer of MPF Accrued Benefits (Benefits) by Scheme Member") to the new trustee after completion. 請填妥載於第 1 頁至第 4 頁之表格，並於完成後提交該表格〔註釋及《計劃成員轉移強積金累算權益(權益)須知》無須提交〕予新信託人。
- Use blue or black ball pen and complete the Form in BLOCK LETTERS. 請以藍色或黑色原子筆及正楷填寫此表格。
- \* means delete whichever is inappropriate. Please insert "N.A." if not applicable. \* 請刪去不適用者。請在不適用處填上「不適用」。
- All amendments should be signed. 如有任何刪改，必須在旁加簽。
- The personal data to be supplied in support of this election of transfer are to be used for processing your election of transfer. The personal data you 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 Mandatory Provident Fund Schemes Authority ("MPFA"). 閣下就此項轉移申請提供的個人資料，將用作處理閣下的轉移申請。閣下提供的個人資料可能會為該目的而轉交相關信託人、相關服務提供者、以及政府或規管機構，包括強制性公積金計劃管理局（簡稱「積金局」）。
- Should you have any questions when completing this Form, please contact INVESCall Member Hotline at (852) 2842-7878. 如閣下於填寫表格時有任何疑問，請致電景順強積金熱線 (852) 2842-7878 查詢。

Section 1 - Scheme Member's Details 第 1 部份 – 計劃成員資料

Name 姓名 (Must be identical to HKID Card / Passport<sup>Note 1</sup> 必須與香港身份證 / 護照相同<sup>註 1</sup>)

Mr. 先生  Ms. 女士  Mrs. 太太  Prof. 教授  Dr. 醫生 / 博士 (please ✓ the appropriate box 請在適當方格內填上✓號)

English 英文

Chinese 中文

Surname 姓 \_\_\_\_\_

First Name 名 \_\_\_\_\_

Residential Address 住址  
\_\_\_\_\_  
\_\_\_\_\_

H.K. 香港 / Kln. 九龍 / N.T. 新界\*

HKID Card Number 香港身份證號碼 \_\_\_\_\_

Passport No.<sup>Note 2</sup> (ONLY for scheme member without HKID Card 本欄僅供  
沒有香港身份證的計劃成員填寫)  
護照號碼<sup>註 2</sup> \_\_\_\_\_

Daytime Contact Number 日間聯絡電話號碼 \_\_\_\_\_

Mobile Phone Number 手提電話號碼 \_\_\_\_\_

E-mail Address 電郵地址 \_\_\_\_\_

Please note that your information provided in this section will be regarded as the latest and the trustee's record will be updated should it differ from that maintained by the trustee.  
請注意閣下如於本部份提供與信託人的記錄不同的資料，信託人將視該資料為最新並會更新有關記錄。

Section 2 - Transfer Information 第 2 部份 – 轉移資料

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

Name of Original Trustee<sup>Note 3</sup> 原信託人名稱<sup>註 3</sup> \_\_\_\_\_

Name of Original Scheme<sup>Note 3</sup> 原計劃名稱<sup>註 3</sup> \_\_\_\_\_

Type of MPF Account 強積金帳戶類別

Personal Account OR  Contribution Account

(please ✓ the appropriate box 請在適當方格內填上✓號)

個人帳戶

或

供款帳戶

Scheme Member's Account Number<sup>Note 3</sup> 計劃成員帳戶號碼<sup>註 3</sup> \_\_\_\_\_

**2b. Details of former employment 以往受僱詳情**

*(applicable for employee who wishes to transfer-out the benefits from a contribution account after cessation of employment  
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 \_\_\_\_\_

Employer's Identification Number <sup>Note 4</sup> 僱主識別號碼 <sup>註 4</sup> \_\_\_\_\_

**2c. Details of self-employed status 自僱人士身份詳情** *(applicable for self-employed person only 只適用於自僱人士)*

Please indicate your reason of transfer and ✓ as appropriate 請表明閣下申請轉移的原因，並於適當方格內填上✓號

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

D 日	M 月	Y 年
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- I will remain in self-employment and my benefits will be transferred to another scheme stated in Section 3a. 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 3 部份 a 項所述的另一個計劃。本人向原計劃供款的最後日期是：

D 日	M 月	Y 年
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**Section 3 - Transfer Options 第 3 部份 – 轉移選擇****3a. 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 the mandatory contributions in my account stated in Section 2a to the following account (Please select option (I), (II) OR (III) and ✓ as appropriate): 本人選擇把在第 2 部份 a 項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 (I)，(II) 或 (III)，並於適當方格內填上✓號）：

- (I) 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 <sup>Note 5</sup> 新信託人名稱 <sup>註 5</sup>

Bank Consortium Trust Company Limited 銀聯信託有限公司

Name of New Scheme <sup>Note 5</sup> 新計劃名稱 <sup>註 5</sup>

Invesco Strategic MPF Scheme 景順強積金策略計劃

Scheme Member's Account Number <sup>Note 5</sup> 計劃成員帳戶號碼 <sup>註 5</sup>

Name of New Employer 新僱主名稱

Employer's Identification Number <sup>Note 4</sup> 僱主識別號碼 <sup>註 4</sup>

- (II) 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 <sup>Note 5</sup> 新信託人名稱 <sup>註 5</sup>

Bank Consortium Trust Company Limited 銀聯信託有限公司

Name of New Scheme <sup>Note 5</sup> 新計劃名稱 <sup>註 5</sup>

Invesco Strategic MPF Scheme 景順強積金策略計劃

Scheme Member's Account Number <sup>Note 5</sup> 計劃成員帳戶號碼 <sup>註 5</sup>

- (III) Retained in the Original Scheme as Personal Account (where applicable)  
以個人帳戶形式保留在原計劃（如適用）**

**3b. Arrangement of my voluntary contributions<sup>Note 6</sup> (if any) in my account stated in Section 2a.**  
**有關本人在第 2 部份 a 項所述帳戶內的自願性供款<sup>註 6</sup> (如有) 的安排。**

Please select option (I) OR (II) and ✓ as appropriate: 請選擇 (I) 或 (II), 並於適當方格內填上 ✓ 號:

(Remarks: 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 Section 3a. If there are no such benefits in your account and you have made an election in Section 3b, the selected option will not be processed. 備註: 如閣下沒有作出任何選擇, 而帳戶內有由自願性供款產生的權益, 則該等權益將以處理第 3 部份 a 項所述權益的同樣方式處理。如閣下已在第 3 部份 b 項作出選擇, 而帳戶內並沒有該等權益, 則有關選擇將不會獲處理。)

- (I) Transferred together with the benefits derived from the mandatory contributions as in Section 3a  
與在第 3 部份 a 項所述由強制性供款所產生的權益一併轉移

- (II) Withdrawn in accordance with the governing rules of the Original Scheme 按照原計劃的管限規則提取權益

Method of payment (please ✓ the appropriate box) 付款方式 (請於適當方格內填上 ✓ 號)

- By cheque 支票付款
- By depositing directly in a bank account under the name of Scheme Member only (a bank account under the name of a third party is not applicable). (This option is applicable only to trustees who provide such services and there may be bank charges involved. Please check with the original trustee for details) 直接存入只以計劃成員名義開立的銀行帳戶 (不適用於以第三者名義開立的銀行帳戶)。(這項選擇只適用於有提供此項服務的信託人, 並且銀行可能會因此收取費用。詳情請向原信託人查詢。)

Name of Bank Account Holder 銀行帳戶持有人姓名 \_\_\_\_\_

Name of Bank 銀行名稱 \_\_\_\_\_

Bank Account Number 銀行帳戶號碼 \_\_\_\_\_

**Important Notes 重要提示**

- If the account to be transferred contains investment in Default Investment Strategy ("DIS"), the annual de-risking of investment in DIS will **NOT** be executed, when the benefits are being transferred out to another scheme or withdrawn in lump sum. 若轉移權益帳戶當中的投資含有預設投資策略 (「預設投資」), 當該帳戶的權益正待轉移至其他計劃或全數提取, 該周年降低投資於預設投資風險的指示將**不會**執行。
- If the account to be transferred contains investment in DIS and there is one or more other transaction(s) is being processed, the annual de-risking of investment in DIS will be **DEFERRED** which 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, 該周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 Invesco Strategic MPF Scheme) if the account to be transferred 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景順強積金策略計劃內同一計劃) 若轉移權益帳戶當中的投資含有預設投資, 該周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。

**Section 4 - Termination of MPF Account with No Residual Balance (if applicable)**

**第 4 部份 - 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 Section 2a upon transfer of the full benefits to the New Trustee and there is no residual balance in the said account. 本人謹此指示原信託人在把本人於第 2 部份 a 項所述的強積金成員帳戶內的所有權益轉移至新信託人後, 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。

**Section 5 - Authorization and Declaration 第 5 部份 - 授權及聲明**

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, 新信託人及積金局可為處理本人的轉移申請, 向相關信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。

Personal Information Collection Statement 收集個人資料聲明

I agree that 本人同意

- (a) Information supplied on the Form and otherwise in connection with my participation in the Scheme may be held by the Trustee and/or the Sponsor and will be used for the purposes of processing and administering my participation in the Scheme, and may also be used for the purpose of carrying out my instructions or responding to any enquiry purporting to be given by me or on my behalf, dealing with any other matters relating to my participation in the Scheme (including, where applicable, the mailing of reports or notices and used by the employer (or a related company of the employer) for any purpose), forming part of the records of the recipient as to the business carried on by it, observing any legal, governmental or regulatory requirements of any relevant jurisdiction (including any disclosure or notification requirements to which any recipient of the data is subject). The Sponsor intends to use my personal data (name, telephone number, fax number, email address, correspondence address, investment records) for direct marketing of MPF products or services but the Sponsor cannot use my personal data without my consent<sup>1</sup>. All such information may be retained after I have ceased to participate in the Scheme. Under the Personal Data (Privacy) Ordinance<sup>2</sup>, I have the right to obtain a copy of information held about myself and for which I may be charged a fee. 信託人及/或營辦人可保留本表格所載資料及其他有關申請參與本計劃的資料，以作為處理及管理本人申請參與本計劃之用；同時亦可用作執行本人的指示或答覆本人的查詢；或其他有關參與本計劃之事項(包括，如適用，郵寄報告或通告，僱主(或其有關聯公司)之任何用途)；此等資料將構成資料接收人業務之部份記錄；以遵行任何有關適用司法管轄區的法律、政府或監管規定(包括任何資料接收人需遵守的披露或通知的規定)。營辦人有意使用本人之個人資料(姓名，電話號碼，傳真號碼，電郵地址，通訊地址，投資紀錄)用作直接推廣強積金產品或服務；然而營辦人除非得到本人同意不能如此使用我的個人資料<sup>1</sup>。在本人停止參與本計劃後，信託人及/或營辦人仍可保留上述所有資料。根據個人資料(私隱)條例<sup>2</sup>，本人有權在支付費用的情況下，索取一份有關本人個人資料的副本。

<sup>1</sup> Please note that by signing this Agreement, you expressly agree to the use of your personal data for direct marketing purposes as mentioned herein. The Sponsor will cease using the personal data upon your written or verbal request. 一經簽署本文件，閣下即明確表示同意營辦人為直接市場推廣目的而使用閣下的個人資料。倘接獲閣下之書面或口頭要求，營辦人將會停止使用閣下的個人資料。

If you do not wish your information to be made available for the dispatch of information on MPF products or services to you from the Sponsor, please  the box.  如閣下不欲將資料提供給營辦人，以用作向閣下發放強積金產品或服務資料，請在方格內加上  號。

<sup>2</sup> You are entitled under the Personal Data (Privacy) Ordinance to be informed by Invesco whether it holds Personal Data about you and to request access to and/or correction of any such Personal Data. Any such request may be made to Data Protection Officer, c/o Head of Compliance, Greater China, Invesco Hong Kong Limited, 41/F, Champion Tower, Three Garden Road, Central, Hong Kong. 按個人資料(私隱)條例，閣下有權要求景順提供是否持有閣下的個人資料，或要求接觸和/或更改任何個人資料。此類要求，可向資料保障主任轉交大中華區監察總監作出書面查詢。請郵寄至香港中環花園道三號冠君大廈四十一樓，景順投資管理有限公司收。

- (b) The Trustee and/or the Sponsor may disclose and transfer such information to the auditors of the Scheme and the Sponsor, including any of their employees, officers, directors and agents and/or to the ultimate holding company of the Sponsor and the Trustee and/or their subsidiaries and/or affiliates or to any third party employed to provide administrative, computer or other services or facilities which are MPF related to any person to whom data is provided or may be transferred as aforesaid and/or to any regulatory authority entitled thereto by law or regulation (whether statutory or not) and/or to the Employer or to a related company of the Employer, which persons may be persons outside Hong Kong. 信託人及/或營辦人可披露或轉交有關參與本計劃的資料予本計劃的核數師和營辦人，及其僱員、主任、董事及代理人；及/或營辦人及信託人的最終控股公司；及/或附屬公司及/或聯營機構；或其僱用之第三者以提供跟強積金有關之行政、電腦或其他服務或設備；及/或受法律或監管規定授權之任何監管機構(無論是否法定機構)及/或僱主或其有關聯公司，而此等人士可以是非居港人士。

I declare that 本人聲明

- (a) I have read and understood the Notes to Transfer of MPF Accrued Benefits (Benefits) by Scheme Member and the Explanatory Notes; and 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；及
- (b) to the best of my knowledge and belief, the information given in this Form is correct and complete. 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。

Signature of the Scheme Member <sup>Note 7</sup> 計劃成員簽署 <sup>註 7</sup>

Date 日期

To transfer the MPF accrued benefits to Invesco Strategic MPF Scheme, please return the completed Form by mail to:  
申請將累算權益轉移至 景順強積金策略計劃，請將填妥的表格郵寄至：

Pension Services (INV)  
Bank Consortium Trust Company Limited  
18/F Cosco Tower  
183 Queen's Road Central, Hong Kong

銀聯信託有限公司  
退休金服務 (INV)  
香港皇后大道中 183 號 中遠大廈 18 樓

BCT use only 銀聯信託專用:	Document Received	Inputted By:	Checked By:	Remarks:
	Date:	Date Inputted:	Date Checked:	

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**Please submit Form MPF(S)- P(M) at page 1 to page 4 to  
the trustee of New Scheme for processing**

(excluding the “Explanatory Notes” and “Notes To Transfer of MPF Accrued  
Benefits (Benefits) by Scheme Member” )

**請將第 MPF(S) - P(M)號表格第 1 頁至第 4 頁  
交予新計劃的信託人辦理**

[ 註釋及 《計劃成員轉移強積金累算權益(權益)須知》 無須提交 ]

## Explanatory Notes

### 註釋

1. If you do **NOT** possess a HKID Card, please fill in your name as shown on your passport. 如閣下**沒有**香港身份證，請填上閣下在護照上的姓名。
2. Scheme members should give their passport numbers ONLY when they do NOT possess HKID cards. (For members of Invesco Strategic MPF Scheme, please provide the same identity number as our record.) 計劃成員只應在沒有香港身份證的情況下才填報護照號碼。(景順強積金策略計劃成員應提供與我們記錄相符的證件號碼。)
3. 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 number in the original scheme, type of MPF account, the name of your former employer or the employer's identification number is not provided or is incorrect. This information can be found: 如閣下沒有提供原信託人名稱、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。閣下可透過以下途徑獲取有關資料：
  - (a) in your membership certificate, notice of acceptance, or notice of participation; or 查閱成員證明書、接納通知或參與通知；或
  - (b) in your annual benefit statement, or other statements provided by the trustee; or 查閱周年權益報表或信託人提供的其他報表；或
  - (c) through the member enquiry facilities available from the trustee. 信託人提供的成員查詢服務。If you are in doubt, please contact your original trustee or your employer. 如有疑問，請聯絡閣下的原信託人或僱主。
4. The employer's identification number is the number assigned by the trustee to the employer concerned. Trustees may use different names for this number (e.g. account number, company code, contract number, employer account number, employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). The number can be found in the statements issued by the trustees or through the member enquiry facilities available from the trustees. If you are in doubt, please contact your trustee or your employer. 僱主識別號碼即信託人為有關僱主編配的號碼。信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)。閣下可查閱信託人發出的報表上或透過信託人提供的成員查詢服務獲取該號碼。如有疑問，請聯絡閣下的信託人或僱主。
5. 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 number in the new scheme is not provided or is incorrect. The information can be found: 如閣下沒有提供新信託人名稱、新計劃名稱或新計劃成員帳戶號碼，或所提供的資料有誤，則此項轉移申請要求或不獲處理。閣下可透過以下途徑獲取有關資料：
  - (a) in your membership certificate, notice of acceptance, or notice of participation; or 查閱成員證明書、接納通知或參與通知；或
  - (b) in your annual benefit statement, or other statements provided by the trustee; or 查閱周年權益報表或信託人提供的其他報表；或
  - (c) through the member enquiry facilities available from the trustee. 信託人提供的成員查詢服務。You may, however, leave the scheme member's account number blank if you have recently enrolled in the scheme and have not been notified of the new account number. If you are in doubt, please contact your new trustee. 不過，如閣下最近才參加計劃，並未獲悉新的成員帳戶號碼，則可留空此項。如有疑問，請聯絡閣下的新信託人。
6. A scheme member can check whether his existing MPF account contains any benefits derived from voluntary contributions from his annual benefit statement 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. 計劃成員可在原信託人向成員發出的周年權益報表上，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。計劃成員亦可透過信託人提供的成員查詢服務查核這項資料。如有疑問，請聯絡閣下的原信託人。
7. 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. 閣下的簽署必須與閣下之前給予原信託人的簽署式樣相同。請注意，若本表格上的簽署與閣下之前給予原信託人的簽署式樣不符，有關轉移或不獲處理。如有疑問，請聯絡閣下的原信託人。

**NOTES TO TRANSFER OF MPF ACCRUED BENEFITS (BENEFITS) BY SCHEME MEMBER**  
**計劃成員轉移強積金累算權益(權益)須知**  
**(For self-employed person, personal account holder or employee ceasing employment)**  
**(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*

Please read the following **important notes** before completing the Form MPF(S)-P(M).  
填寫第 MPF(S)-P(M) 號表格前，請先閱讀下列 **重要資料**。

- (1) Definition of terms 用詞定義
  - (a) "Contribution Account" - 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. 「供款帳戶」-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。
  - (b) "Personal Account" - an account in a scheme which is mainly used to receive the benefits transferred from another contribution or personal account. 「個人帳戶」-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。
  - (c) "Original Trustee" (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. 「原信託人」(在《強制性公積金計劃(一般)規例》(簡稱《規例》)中亦稱「轉移信託人」)-指轉出閣下的權益的計劃的信託人。
  - (d) "New Trustee" (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 MPF(S)-P(M) will be the same as the original trustee. 「新信託人」(在《規例》中亦稱「承轉信託人」)-指轉入閣下的權益的計劃的信託人。如閣下選擇把權益轉移至同一計劃的另一個帳戶或轉移至同一信託人的另一個計劃，第 MPF(S)-P(M) 號表格所指的新信託人將與原信託人相同。
  - (e) "Original Scheme" - the scheme from which your benefits are to be transferred. 「原計劃」-指轉出閣下的權益的計劃。
  - (f) "New Scheme" - 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 MPF(S)-P(M) will be the same as the original scheme. 「新計劃」-指轉入閣下的權益的計劃。如閣下選擇把權益轉移至同一計劃的另一個帳戶，第 MPF(S)-P(M) 號表格所指的新計劃將與原計劃相同。
- (2) 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. 如閣下現時投資於強積金保證基金，從該保證基金轉出權益，可能會導致閣下不符合部分或所有保證條件，以致影響閣下享有保證的資格。詳情請查閱原計劃的要約文件，或向原信託人查詢。
- (3) 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 (a) do not give or have not given any investment instructions for the account to your new trustee or (b) 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，如閣下(a)沒有或尚未就有關帳戶向閣下的新信託人給予任何投資指示；或(b)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，請向新信託人查詢詳情。如欲就新計劃的帳戶更改或給予投資指示，亦請聯絡新信託人。
- (4) 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. 如閣下已年滿或快將年滿50歲，而現時閣下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。如計劃的信託人在預設投資策略下按年降低閣下的投資風險的時間，與接獲閣下的轉移權益申請的時間相當接近，該計劃的信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。如欲瞭解信託人如何處理該等交易，請向相關信託人查詢詳情。
- (5) 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 MPF(S)-P(M) to the new trustee. 請確保閣下在新計劃已開立個人帳戶或供款帳戶。否則，閣下須先行登記參加該計劃，然後才向新信託人提交第 MPF(S)-P(M) 號表格。
- (6) If you wish to transfer-out the benefits from more than one accounts, you should submit a separate Form MPF(S)-P(M) 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第 MPF(S)-P(M) 號表格。

- (7) If you wish to transfer-out the benefits from your contribution account during employment, you should complete Form MPF(S)-P(P). 如欲在現職期間從閣下的供款帳戶轉出權益，請填寫第 MPF(S)-P(P) 號表格。
- (8) 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。
- (9) In order to prevent a third party from filling in incorrect information, please **DO NOT sign on a blank form**. After the completed Form MPF(S)-P(M) 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**。在新信託人收到已填妥的第 MPF(S)-P(M) 號表格後，之前由信託人採取的行政步驟未必能夠撤銷。
- (10) If any information provided on Form MPF(S)-P(M) (including the signature) is incorrect or incomplete, the trustees may not be able to process your benefit transfer request. 若閣下在第 MPF(S)-P(M) 號表格上所提供的任何資料（包括簽署）不正確或不完整，信託人可能無法處理閣下的權益轉移要求。
- (11) Please refer to the publication of the Mandatory Provident Fund Schemes Authority ("MPFA") available from the MPFA website ([www.mpfa.org.hk](http://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](http://www.mpfa.org.hk)）的相關宣傳刊物。
- (12) 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，這些資料將有助閣下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，請聯絡相關信託人。
- (13) 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 benefit transfer, you may contact the MPFA via e-mail: [mpfa@mpfa.org.hk](mailto:mpfa@mpfa.org.hk) or hotline: 2918 0102. 如欲就閣下的權益轉移申請作出查詢或尋求協助，請聯絡閣下的原信託人或新信託人。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](mailto:mpfa@mpfa.org.hk) 或熱線電話：2918 0102）。

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