



Application Form - Special Voluntary Contribution Savings Plan

特別自願性供款儲蓄計劃申請表格

Please mark "✓" in the appropriate box. 請於適用的方格內填上 "✓" 號。

NOTE 注意:

- Please read the principal brochure (and any addendum thereto) of the Bank Consortium MPF Plan carefully before completing this form.
填寫此申請書前，請先細閱銀聯信託強積金計劃總說明書及任何其附錄的條款。
- I / We understand that, if I do not make an election on the arrangement of the accrued benefits in Special Voluntary Contribution "SVC" plan, upon termination of my employment or transferring accrued benefit to other scheme, I will be taken to have elected to transfer to a SVC Account in the preserved account of the current scheme. (Not applicable to preserved member)
本人 / 吾等明白，如本人於離職後 / 轉移有關累算權益至其他計劃時，未有通知受託人對現有戶口之特別自願性儲蓄計劃內的累算權益的安排，本人將被視作選擇將有關累算權益轉移至現有計劃之保留帳戶的特別自願性供款戶口內。(不適用於保留成員)。

PART I. MEMBER DETAILS 成員資料

Name of Plan 計劃名稱	Bank Consortium MPF Plan 銀聯信託強積金計劃		Participating Plan No. 參與計劃編號	
Name of Employer (if any) 公司名稱 (如有)				
Name of Member 成員姓名			HKID Card / Passport* No. 香港身份證 / 護照* 號碼	
Residential Phone No. 住宅電話號碼	Business Phone No. 辦公室電話號碼	Mobile Phone No. 手提電話號碼	E-mail Address 電郵地址	

PART II. REGULAR CONTRIBUTION 定期供款

The minimum amount of monthly regular contribution is **HKS300**. It must be made in form of direct debit and the first contribution will be debited from your bank account until you receive the confirmation letter from Bank Consortium Trust Company Limited ("BCT") stating the effective date of the direct debit service. Please consult your banking officer for applicable service fee, if any, charged by your bank. It may take four to six weeks for processing your instruction. Please read the terms and complete the details below.

每月定期最低供款額為 **300 港元**，並且必須以直接付款方式作出供款。首次供款將在銀聯信託有限公司 (「銀聯信託」) 發出的直接付款授權服務確認通知書上註明的生效日期後，從您的銀行帳戶中扣除。請聯絡您的銀行主任以便了解在此服務上會否收取任何費用。處理有關指示約需時四至六星期。請參閱以下細則，並填妥有關資料。

Name of Party to be Credited (the Beneficiary) 收款人 (受益人) 名稱	Bank Code 銀行編號	Branch Code 分行編號	Account No. to be Credited 收款帳戶號碼
Bank Consortium Trust Co Ltd - Client A/C - Master Clearing 銀聯信託有限公司 - 集成計劃	0 2 5	3 2 8 8 2	4 1 2 9 1 0

Direct Debit Authorisation Declaration:

- I / We authorise my / our below-named bank ("the Bank") to effect transfers from my / our account to that of the above-named Beneficiary in accordance with such instructions as the Bank may receive from the Beneficiary and / or its banker from time to time.
- I / We agree that the Bank shall not be obliged to ascertain whether or not notice of any such transfer has been given to me / us.
- I / We jointly and severally accept full responsibility for any overdraft (or increase in existing overdraft) on my / our account which may arise as a result of any such transfer(s).
- I / We confirm that my / our signature(s) on this form is / are the same as that / those for the operation of my / our savings / current account to be debited for the transfer.
- I / We agree to notify BCT of any change of bank account or cancellation of payment method and further agree that should there be insufficient funds in my / our account to meet any transfer hereby authorised, the Bank shall be entitled, at its discretion, not to effect such transfer in which event the Bank may levy the usual service charge to be paid by me / us.
- This authorisation shall have effect until further notice.
- I / We agree that any notice of cancellation or variation of this authorisation which I / we may give to the Bank shall be given at least seven working days prior to the date on which such cancellation / variation is to take effect and at the same time such notice shall be given to BCT in writing.
- I / We authorise BCT, to initiate and arrange for contributions to be debited from my / our bank account according to the following specification, in favour of BCT itself.
- I / We understand that BCT may cancel this direct debit service at any time on one week's written notice without recourse.
- In consideration of BCT's agreeing to accept and act upon my / our instructions to initiate the making of direct debits from my / our designated account to BCT's designated accounts with Shanghai Commercial Bank Limited, I / we agree to indemnify BCT and hold BCT harmless against all actions, claims, proceedings, loss, damages, costs and expenses of whatever nature which may be brought against BCT or suffered or incurred by BCT and which shall have arisen either directly or indirectly out of or in connection with this direct debit authorisation arrangement.
- I / We understand and agree to the terms and conditions above.

直接付款指示聲明:

- 本人 / 吾等現授權本人 / 吾等下述的銀行 (「付款銀行」) 按上述受益人不時給予之指示由本人 / 吾等的銀行帳戶將款項轉帳予上述受益人之銀行帳戶。
- 本人 / 吾等同意付款銀行並無義務於每次轉帳時對本人 / 吾等作出通知。
- 如因該等轉帳而引致本人 / 吾等的帳戶出現透支 (或引致現時之透支增加)，本人 / 吾等願共同及個別承擔全部責任。
- 本人 / 吾等確認本人 / 吾等於本表格上之簽署，與本人 / 吾等運作付款銀行儲蓄或支票帳戶之簽署完全相符。
- 本人 / 吾等同意就更改付款帳戶或取消付款方式而向銀聯信託作出通知，並同意付款銀行可在本人 / 吾等帳戶存款不足的情況下毋須完成有關轉帳，以及因此而產生之一般銀行服務費用亦由本人 / 吾等負責繳付。
- 此項付款授權將持續有效直至另行通知為止。
- 本人 / 吾等同意必須於七個工作天前就此項付款授權之任何轉變或取消向本人 / 吾等之付款銀行作出通知，並同時以書面通知銀聯信託。
- 本人 / 吾等現授權銀聯信託從本人 / 吾等下述的銀行帳戶提出及安排扣除供款，以支付有關金額予銀聯信託。
- 本人 / 吾等明白銀聯信託可於一星期前發出書面通知取消此直接付款服務，並毋須負追索之責任。
- 因銀聯信託同意接受及遵從本人 / 吾等之指示由本人 / 吾等指定之銀行戶口直接將款項轉入銀聯信託在上海商業銀行指定之戶口，本人 / 吾等同意就此項直接付款授權安排中所有直接或間接向銀聯信託提出或引致銀聯信託蒙受損害之一切訴訟、申索、法律程序、損失、賠償、訟費及任何性質的開支對銀聯信託作出彌償。
- 本人 / 吾等明白及同意上述的條款及條件。



PART II. REGULAR CONTRIBUTION 定期供款 (Continued 續)			
My / Our Bank and Branch Name 本人 / 吾等之銀行及分行名稱	Bank No. 銀行編號	Branch No. 分行編號	Account No. 帳戶編號
Details of Account Holder(s) as on Statement / Passbook* 帳戶持有人於結單 / 存摺* 上所記錄的資料			
Name of Account Holder 帳戶持有人姓名 (Must be the same as the name stated in Part I 必須與第 I 部份填寫的姓名相符)		Signature of Account Holder 帳戶持有人簽署 (Please sign in the same specimen that you sign on your Bank Account 請以銀行帳戶的簽署式樣簽署)	
Name of Joint Account Holder(s) (if applicable) 聯名帳戶持有人姓名 (如適用)		Signature(s) of Joint Account Holder(s) 聯名帳戶持有人簽署 (Please sign in the same specimen that you sign on your Bank Account 請以銀行帳戶的簽署式樣簽署)	
HKID Card / Passport* No. (Please provide a copy) 香港身份證 / 護照* 號碼 (請附上副本)		Date (D / M / Y) 日期 (日 / 月 / 年):	
Debtor's Reference (BCT USE ONLY) 債務人參考 (銀聯信託專用)			
Monthly Regular Contribution Amount 每月定期供款金額	First Direct Debit Month 首次直接付款月份	Monthly Direct Debit Date on# 每月直接付款日期#	
HKS _____ 港元	Month 月	Year 年	<input type="checkbox"/> Day of each month 於每月 <input type="checkbox"/> Last day of each month 每月最後一天
# If not specified, this will be the following working day, Saturday, gale warning day or black rainstorm warning day, last day of the month, it will be the preceding working day. 如沒指示，將會設定為每月最後一天並為星期六或黑色暴雨警告日，則順延至隨後的工作天。如直接付款	It may take 6-8 weeks to set up direct debit arrangement and BCT will send you a confirmation letter upon its successful set up. 處理直接付款安排的申請需四至六星期，當有關申請成功獲批後，銀聯信託會向您發出有關確認書。		
PART III. LUMP SUM CONTRIBUTION 整筆供款			
The minimum amount of each lump sum contribution is HK\$500 . Please enclose your own crossed personal cheque payable to the scheme by referring to the respective payee name below. Do not send us cash or pay by cash / bank-in the cheque at our servicing bank branches as it would delay the processing time. Please also complete the details below for processing. 整筆最低供款額為 500 港元 。務請附上您的個人劃線支票乙張及參閱以下之支票抬頭。請勿郵寄現金或於我們的特定銀行分行遞交現金 / 存入支票，此舉將會延遲處理申請的時間。請填妥以下有關資料以便處理。			
Payee Name 支票抬頭		Contribution Amount 供款金額	
Bank Consortium Trust Co Ltd - Client A/C - Master Clearing 銀聯信託有限公司 - 集成計劃		HKS _____ 港元	

PART IV. INVESTMENT MANDATE 投資委託	
Important Notes 重要提示： 1. The investment mandate on this form will apply to all voluntary contributions only. 此表格上之投資委託書將只適用於所有自願性供款的投資委託。 2. If no investment mandate is specified, the default mandate is 100% in the default constituent fund, currently, the Bank Consortium E30 Mixed Asset Fund (multi-manager) (formerly known as Bank Consortium Stable Fund). 如沒有指定投資委託，其投資委託將設定為100%於預設成份基金，現時之預設成份基金為銀聯信託E30混合資產基金(多元經理)(前稱銀聯信託平穩基金)。 3. Your instructions will be processed by us as soon as possible. 您的指示將被儘快執行。	
Constituent Fund 成份基金	Voluntary Contributions (i.e. all voluntary contributions made under current employer and all Special Voluntary Contributions) 自願性供款 (即所有經由現任僱主作出之自願性供款及所有特別自願性供款) Percentage 百分比 (%) (Must be an integer 必須為整數)
Equity Funds 股票基金	
Bank Consortium China and Hong Kong Equity Fund 銀聯信託中國及香港股票基金	
Bank Consortium Hong Kong Equity Fund 銀聯信託香港股票基金	
Bank Consortium Hang Seng Index Tracking Fund 銀聯信託恒指基金	
Bank Consortium Asian Equity Fund 銀聯信託亞洲股票基金	
Bank Consortium European Equity Fund 銀聯信託歐洲股票基金	
Bank Consortium Global Equity Fund 銀聯信託環球股票基金 (Templeton 鄧普頓)	
Bank Consortium International Equity Fund 銀聯信託國際股票基金 (Fidelity 富達)	
Life Cycle Funds 人生階段基金	
Bank Consortium SaveEasy 2040 Fund 銀聯信託儲蓄易2040基金	
Bank Consortium SaveEasy 2035 Fund 銀聯信託儲蓄易2035基金	
Bank Consortium SaveEasy 2030 Fund 銀聯信託儲蓄易2030基金	
Bank Consortium SaveEasy 2025 Fund 銀聯信託儲蓄易2025基金	
Bank Consortium SaveEasy 2020 Fund 銀聯信託儲蓄易2020基金	
Mixed Asset Funds 混合資產基金	
Bank Consortium E90 Mixed Asset Fund 銀聯信託E90混合資產基金 (Fidelity 富達)	
Bank Consortium E70 Mixed Asset Fund 銀聯信託E70混合資產基金 (multi-manager 多元經理) (Formerly known as Bank Consortium Growth Fund 前稱銀聯信託進取基金)	
Bank Consortium E50 Mixed Asset Fund 銀聯信託E50混合資產基金 (Formerly known as Bank Consortium Balanced Fund 前稱銀聯信託平衡基金)	
Bank Consortium E30 Mixed Asset Fund 銀聯信託E30混合資產基金 (Formerly known as Bank Consortium Stable Fund 前稱銀聯信託平穩基金)	
Lower Risk Funds 較低風險基金	
Bank Consortium Absolute Return Fund 銀聯信託絕對回報基金	
Bank Consortium Global Bond Fund 銀聯信託環球債券基金	
Bank Consortium Hong Kong Dollar Bond Fund 銀聯信託港元債券基金	
Bank Consortium MPF Conservative Fund 銀聯信託強積金保守基金 (Formerly known as Bank Consortium Capital Preservation Fund 前稱銀聯信託保本基金)	
Total 總和	100%

If you have other voluntary contributions, this investment mandate will override your future investment mandate of other voluntary contributions.
 如您有作出其他自願性供款，此投資委託將取代您其他自願性供款將來的投資委託。

PART V. PERSONAL INFORMATION COLLECTION STATEMENT 收集個人資料聲明

The personal data collected from you will only be accessed and handled by properly authorised staff of BCT and its properly authorised service providers and will be used for processing the instructions of this form; administering and managing the contributions and accrued benefits under the Participating Plan; compliance with applicable laws and regulations; marketing our products or services to you; any other purpose relating to the above; and the carrying out of matching procedures with any other personal data for the purpose of running a pension and trust business. If required by law or relevant regulations, BCT may provide such personal data to governmental bodies, regulators or other third parties. If there is any change in the information so provided, BCT should be notified as soon as practicable. Failure to provide the information requested may result in BCT being unable to process the instructions. To access or correct your personal data held by BCT or to request BCT not to use such personal data for direct marketing purposes, please write to the Data Protection Officer at BCT, 18/F Cosco Tower, 183 Queen's Road Central, Hong Kong.

從您收集之個人資料，僅供銀聯信託正式授權之職員及服務供應商使用及處理，並且會被用作處理此表格之指示；處理和管理參與計劃下之供款及累算權益；遵守法律及規例；向您推銷本公司之產品或服務；與上述有關之任何其他用途；及為經營退休計劃及信託業務而與任何其他個人資料進行核對程序。如因法律或相關規例規定，銀聯信託可向政府機關、監管機構或其他第三者提供有關個人資料。如所提供之資料有任何更改，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。要查閱或更改銀聯信託所持有您的個人資料或要求銀聯信託不再使用其個人資料作直銷之用，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 VI. DECLARATION AND SIGNATURE 聲明及簽署

- (1) I understand and agree to the terms of the Personal Information Collection Statement as set out in this form.
 - (2) I undertake that if there is any change in the information so provided, I shall notify BCT as soon as reasonably practicable.
 - (3) I declare that to the best of my knowledge and belief, the information given in this form and / or its attachment(s), if any, is correct and complete and that the contribution amount is derived from my relevant income.
- (1) 本人明白及同意於此表格之收集個人資料聲明條款。
- (2) 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) 本人聲明，盡本人所知及所信，本表格及隨附之文件（如有）所提供的資料均屬正確無訛且無缺漏，及此供款金額乃由本人之有關入息衍生而來。

SAMPLE

S.V.

Signature of Applicant
申請人簽署

Date (D / M / Y)
日期 (日 / 月 / 年)

Warning : Section 43E of the Mandatory Provident Fund Schemes Ordinance makes it an offence to make a false or misleading statement in a material respect in any document given to an approved trustee in connection with such Ordinance.

注意 : 《強制性公積金計劃條例》第43E條訂明，如在該條例有關連的方面而給予核准受託人的任何文件中在要項上作出虛假或誤導性的陳述，即屬違法。

BCT USE ONLY 銀聯信託專用

Date Received:	Input By:	Verified By:	Remarks:
Broker Code:	Agent Code:	Campaign Code:	BD Code: