



Bank Consortium Trust Co. Ltd. 銀聯信託有限公司
Request for Fund Transfer Form^{Note 1} (For Scheme Member)
資金轉移表格^{註1} (計劃成員適用)

FORM: RFT (MEM)

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

NOTE 注意：

- Please complete this form in BLOCK LETTER. 請以正楷填寫本表格。
- Please read the explanatory notes carefully before completing this form. 填寫此表格前，請先細閱填報須知。
- Upon completion of this form, scheme member may give this form to: 計劃成員填妥本表格後，可把表格交回：
 - Transferor trustee 轉移受託人：** 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 transferee 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承轉受託人該選擇的書面通知。
 - Transferee trustee 承轉受託人：** 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。
- If there are **Special Voluntary Contributions** under the account(s) to be transferred, please complete and return the "Request for Transfer / Withdrawal Form (For Special Voluntary Contribution)" ("the form") to give us instruction on the handling of your special voluntary contributions. If we do not receive the form upon transfer of your accrued benefits, your special voluntary contributions will be transferred to / retained in the preserved account under the existing scheme. 若您欲轉移之帳戶內有特別自願性供款，請填寫並交回「轉移 / 提取表格 (特別自願性供款適用)」以指示您特別自願性供款之處理方式。若本公司於轉移您的累算權益時尚未收到該表格，您的特別自願性供款將被轉移 / 保留於現有計劃之保留帳戶內。
- Definition of terms is provided at Note 2. 用詞定義載於註2。

PART I. DETAILS OF THE SCHEME MEMBER 計劃成員資料

Name of Plan 計劃名稱	<input type="checkbox"/> Bank Consortium MPF Plan 銀聯信託強積金計劃		
	<input type="checkbox"/> Bank Consortium Industry Plan 銀聯信託行業計劃		
Name of Member 成員姓名	English (Mr / Ms / Mrs*)	HKID Card / Passport* No. ^{Note 3} 香港身份證 / 護照* 號碼 ^{註3}	
	中文 (先生 / 小姐 / 女士*)		
Business Phone No. 辦公室電話號碼	Residential Phone No. 住宅電話號碼	Mobile Phone / Pager* No. 手提電話 / 傳呼機* 號碼	E-mail Address 電郵地址
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)			

PART II. FUND TRANSFER INFORMATION 資金轉移資料

A. Details of the Account from which Accrued Benefits Derived from Mandatory Contributions are to be Transferred
 就要求轉移由強制性供款所衍生的累算權益所屬的帳戶資料

Name of the Trustee 受託人名稱	
Name of the Scheme 計劃名稱	
Participating Plan No. 參與計劃編號	
Membership No. (if applicable) 成員編號 (如適用)	

B. Fund Transfer Options ^{Note 4}
 轉移資金的選擇^{註4}

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

(1) I elect to have the accrued benefits derived from mandatory contributions in my account stated in Part IIA above transferred as follows:
 本人選擇把以上第 IIA 部份所註明的本人帳戶內由強制性供款所衍生的累算權益作出以下的轉移安排:

(a) To my account with my new employer 轉移至本人新僱主就本人開立的帳戶

Name of the New Employer 新僱主名稱 _____
 New Employer's Participation No. ^{Note 5} 新僱主參與編號^{註5} _____
 Name of the Trustee 受託人名稱 _____
 Name of the Scheme 計劃名稱 _____
 Scheme Member's Account No. ^{Note 6} (if known) 計劃成員帳戶號碼^{註6} (如知悉) _____

(b) To my existing / a new* account in a master trust scheme / industry scheme* 轉移至本人在集成信託計劃 / 行業計劃* 內現有 / 新* 帳戶

Name of the Trustee 受託人名稱 _____
 Name of the Scheme 計劃名稱 _____
 Scheme Member's Account No. ^{Note 6} (if known) 計劃成員帳戶號碼^{註6} (如知悉) _____

(c) Retain in the preserved account of the current scheme

The MPF asset transferred in to BCT from another account will be reinvested according to the investment mandate of your BCT account as stated in Part II B (i).

您由其他帳戶轉移至銀聯信託的強積金資金將根據您於銀聯信託帳戶的投資委託 (於 B(i) 部分填寫)，作出投資安排。

* Delete as appropriate 請刪去不適用者

(2) Are there any voluntary contributions?

帳戶內有沒有自願性供款?

- (i) Yes
有

I elect to have the accrued benefits derived from voluntary contributions to be:

本人選擇把由自願性供款所衍生的累算權益作出以下的安排:

- (a) transferred with my Special Voluntary Contributions (if any) to a Special Voluntary Contribution Account in a preserved account with the same scheme (Only applicable to age 65 or above)
連同特別自願性供款(如有)轉移至現有計劃之保留帳戶特別自願性供款戶口內(只適用於年滿65歲)
- (b) handled in the same way as those derived from mandatory contributions
以處理強制性供款所衍生的累算權益的同樣方式處理
- (c) withdrawn in accordance with the governing rules of the scheme
根據計劃的管限規則提取權益

Method of payment:

付款方式:

- By cheque
支票

- By depositing directly in my bank account (Fees may be charged for the transaction)
直接存入本人銀行帳戶(此項手續或會涉及收費)

Name of Bank 銀行名稱 _____

Account No 帳戶號碼 _____

Name of Account Holder 帳戶持有人名稱 _____

- (ii) No
沒有

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*。

Remark: If no option is selected in item (2), please note that the fund transfer arrangement for the accrued benefits derived from voluntary contributions (except Special Voluntary Contributions), if any, will be the same as that of mandatory contributions.

備註: 如成員於第(2)項未作出任何選擇,其自願性供款(特別自願性供款除外)所衍生的累算權益(如有),將與強制性供款所衍生的累算權益的基金轉移安排相同。

Participating Plan Termination (Applicable to Self-employed Person only) 終止參與計劃 (只適用於自僱人士)

I would like to terminate the participating plan effective from _____ - _____ (D / M / Y). Therefore, contributions have been / will be made up to the day before the effective date.

本人欲終止參與計劃,生效日期為_____年_____月_____日。因此供款將供 / 已供至生效日期的前一天。

PART III. 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 Bank Consortium Trust Company Limited ("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,僅供銀聯信託有限公司(「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 IV. DECLARATION AND SIGNATURE 聲明及簽署

(1) I / We understand and agree to the terms of the Personal Information Collection Statement as set out in this form. I / We agree that the information and data given in this form can be used by the approved trustee concerned and the Mandatory Provident Fund Schemes Authority in activities relating to the processing of the transfer and may be disclosed to other parties for such purposes.

(2) I / We undertake that if there is any change in the information so provided, I / we shall notify BCT as soon as reasonably practicable.

(3) I / We declare that to the best of my / our knowledge and belief, the information given in this form and its attachments is correct and complete.

(1) 本人 / 吾等明白及同意於此表格之收集個人資料聲明條款。本人 / 吾等同意本表格所填報的個人資料可供有關的核准受託人及強制性公積金計劃管理局作處理轉移的用途,並可為此用途向其他人士披露。

(2) 本人 / 吾等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 / 吾等聲明,盡本人 / 吾等所知及所信,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。

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:

Processed By:

() Approved By:

() Remarks:

Broker Code:

Agent Code:

Campaign Code:

BD Code:

* Delete as appropriate 請刪去不適用者

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

Fax 傳真: (852) 2992-0809
Employer Hotline 僱主熱線: (852) 2298-9388

Website 網址: www.bethk.com
Member Hotline 成員熱線: (852) 2298-9333

Request for Fund Transfer Form (For Scheme Member) [FORM: RFT (MEM)]

Explanatory Notes

1. I. This form should be used when a scheme member wishes to transfer his / her accrued benefits:
 - from an MPF registered scheme to another MPF registered scheme; or
 - from an account in an MPF registered scheme to another account in the same scheme.
- II. For ease of processing, a scheme member is required to fill in a separate form “Request for Fund Transfer Form (For Scheme Member)” for each account from which funds are to be transferred.
- III. Except for benefits derived from Special Voluntary Contribution (“SVC”), a scheme member should transfer per each account of his / her accrued benefits therein in a lump sum. For benefits derived from SVC, transfers require specific instruction from the scheme member.
2. Definition of terms:
 - I. “Contribution account” – an account into which mandatory contributions and / or voluntary contributions are paid in respect of a current employment or current self-employment.
 - II. “Preserved account” – an account in which accrued benefits in respect of (a) any former employment of a scheme member, (b) any former self-employment of a scheme member, or (c) a person (other than a person to whom paragraph (a) applies) who has joined the Plan in accordance with the Rules other than as an employee member or an self-employed member;
 - III. “Former employee” – an employee who has just ceased his / her employment.
 - IV. “Former self-employed person” – a person who has just ceased self-employment.
 - V. “A transferor trustee” – the trustee of a scheme from which the accrued benefits of a member are to be transferred in accordance with the member’s election, whether to another registered scheme or to another account within the same scheme.
 - VI. “A transferee trustee” – the trustee of a scheme to which the accrued benefits of a member are to be transferred in accordance with the member’s election.
3. Scheme members should give their Passport No. ONLY when they do NOT possess HKID Cards.
4. Different types of account holders have different transfer options. An applicant may check the list below to see the transfer options available to him / her:

I. CONTRIBUTION ACCOUNTS

A. Transfer options for a contribution account holder who is a FORMER EMPLOYEE

- (1) For a contribution account in an employer sponsored scheme, the former employee may elect to transfer to:
 - (a) an account in a master trust scheme nominated by himself / herself; or
 - (b) an existing account of the former employee in an industry scheme; or
 - (c) (if the former employee is subsequently employed by a new employer), the contribution account of the scheme in which the new employer is participating in relation to him / her. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.
- (2) For a contribution account in a master trust scheme, the former employee may elect to transfer to:
 - (a) another account in the same scheme (i.e. retained in the current scheme); or
 - (b) an account in another master trust scheme nominated by himself / herself; or
 - (c) an existing account of the former employee in an industry scheme; or
 - (d) (if the former employee is subsequently employed by a new employer), the contribution account of the scheme in which the new employer is participating in relation to him / her. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.
- (3) For a contribution account in an industry scheme, the former employee may elect to transfer to:
 - (a) an account in a master trust scheme nominated by himself / herself; or
 - (b) an existing account of the former employee in another industry scheme; or
 - (c) (if the former employee is subsequently employed by a new employer), the contribution account of the scheme in which the new employer is participating in relation to him / her. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.

If the former employee wishes to retain his / her accrued benefits in the industry scheme, he / she does not need to fill in this form for transfer.

B. Transfer options for a contribution account holder who is a SELF-EMPLOYED PERSON OR FORMER SELF-EMPLOYED PERSON

- (1) For a contribution account in a master trust scheme, the self-employed person or former self-employed person may elect to transfer to:
 - (a) an account in another master trust scheme nominated by himself / herself; or
 - (b) an existing account of the person in an industry scheme; or
 - (c) an account in an industry scheme to which the person is eligible to belong; or
 - (d) (if the person is a former self-employed person and is subsequently employed by a new employer), the contribution account of the scheme in which the new employer is participating in relation to the person. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.
- (2) For a contribution account in an industry scheme, the self-employed person or former self-employed person may elect to transfer to:
 - (a) an account in a master trust scheme nominated by himself / herself; or
 - (b) an existing account of the person in another industry scheme; or
 - (c) an account in another industry scheme to which the person is eligible to belong; or
 - (d) (if the person is a former self-employed person and is subsequently employed by a new employer), the contribution account of the scheme in which the new employer is participating in relation to the person. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.

II. PRESERVED ACCOUNTS

Any member of a master trust scheme or an industry scheme may elect to have the accrued benefits held in a preserved account of the member in the scheme transferred to another scheme to which the member is eligible to belong by giving this form to the transferee trustee concerned.

5. The participation number is the number printed on the participation certificate issued by the MPFA to the participating employer.
6. Leave it blank if a member has newly joined the scheme and is not aware of the account number for his / her new account.

資金轉移表格(計劃成員適用)[表格：RFT (MEM)]

填報須知

- I. 本表格供擬把累算權益：
 - 由一個強積金註冊計劃轉移至另一個強積金註冊計劃；或
 - 由一個強積金註冊計劃內的帳戶轉移至同一計劃內的另一個帳戶的計劃成員使用。
 - II. 為方便處理申請，計劃成員須就每個擬移走資金的帳戶填寫一份「資金轉移表格(計劃成員適用)」。
 - III. 除特別自願性供款衍生之權益外，計劃成員應就每一個擬移走資金的帳戶，以整筆款項的形式轉移權益的全數。計劃成員須作出明確的指示以轉移特別自願性供款衍生之權益。
- 用詞定義：
 - I. 「供款帳戶」 – 指強制性供款及 / 或自願性供款就現時受僱工作或現時自僱工作而支付入內的帳戶。
 - II. 「保留帳戶」 – 指就計劃保留成員帳戶而帳戶內的累算權益由 (a) 任何以往受僱工作所衍生的；(b) 任何以往自僱工作所衍生的；或 (c) 根據 (a) 以外之條款而又不屬於僱員成員或自僱成員所衍生的。
 - III. 「前任僱員」 – 指剛被終止受僱的僱員。
 - IV. 「前任自僱人士」 – 指剛終止自僱的人士。
 - V. 「轉移受託人」 – 指計劃的受託人，而該計劃的某成員的累算權益是按照該成員所作的選擇而轉移至另一註冊計劃或同一計劃的另一帳戶內。
 - VI. 「承轉受託人」 – 指計劃的受託人，而該計劃的某成員的累算權益是按照該成員的選擇而轉移至該計劃。
 - 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。
 - 不同類別的帳戶持有人可作不同的轉移選擇。申請人可參考下文，以查證可作出的選擇。

I. 供款帳戶

A. 屬前任僱員的供款帳戶持有人可作的轉移選擇

- (1) 就僱主營辦計劃內的供款帳戶而言，前任僱員可選擇把累算權益轉移至：
 - (a) 他 / 她所指定的某集成信託計劃內的帳戶；或
 - (b) 他 / 她在某行業計劃內的現有帳戶；或
 - (c) (如前任僱員其後受僱於新僱主，則) 新僱主就他 / 她而參與的計劃內的供款帳戶。不過，當累算權益轉移至此供款帳戶後，他 / 她在終止受僱於新僱主前，再不能將權益轉移。
- (2) 就集成信託計劃內的供款帳戶而言，前任僱員可選擇把累算權益轉移至：
 - (a) 同一計劃內的其他帳戶(即保留在現有計劃內)；或
 - (b) 他 / 她所指定的另一集成信託計劃內的帳戶；或
 - (c) 他 / 她在行業計劃內的現有帳戶；或
 - (d) (如前任僱員其後受僱於新僱主，則) 新僱主就他 / 她而參與的計劃內的供款帳戶。不過，當累算權益轉移至此供款帳戶後，他 / 她在終止受僱於新僱主前，再不能將權益轉移。
- (3) 就行業計劃內的供款帳戶而言，前任僱員可選擇把累算權益轉移至：
 - (a) 他 / 她所指定的某集成信託計劃內的帳戶；或
 - (b) 他 / 她在另一行業計劃內的現有帳戶；或
 - (c) (如前任僱員其後受僱於新僱主，則) 新僱主就他 / 她而參與的計劃內的供款帳戶。不過，當累算權益轉移至此供款帳戶後，他 / 她在終止受僱於新僱主前，再不能將權益轉移。如前任僱員擬把累算權益保留在行業計劃內，便毋須填報本轉移權益的表格。

B. 屬自僱人士或前任自僱人士的供款帳戶持有人可作的轉移選擇

- (1) 就集成信託計劃內的供款帳戶而言，自僱人士或前任自僱人士可選擇把累算權益轉移至：
 - (a) 他 / 她所指定的另一集成信託計劃內的帳戶；或
 - (b) 他 / 她在某行業計劃內的現有帳戶；或
 - (c) 他 / 她有資格加入的行業計劃內的帳戶；或
 - (d) (如屬前任自僱人士並其後受僱於新僱主，則) 新僱主就他 / 她而參與的計劃內的供款帳戶。不過，當累算權益轉移至此供款帳戶後，他 / 她在終止受僱於新僱主前，再不能將權益轉移。
- (2) 就行業計劃內的供款帳戶而言，自僱人士或前任自僱人士可選擇把累算權益轉移至：
 - (a) 他 / 她所指定的集成信託計劃內的帳戶；或
 - (b) 他 / 她在另一行業計劃內的現有帳戶；或
 - (c) 他 / 她有資格加入的另一行業計劃內的帳戶；或
 - (d) (如屬前任自僱人士並其後受僱於新僱主，則) 新僱主就他 / 她而參與的計劃內的供款帳戶。不過，當累算權益轉移至此供款帳戶後，他 / 她在終止受僱於新僱主前，再不能將權益轉移。

II. 保留帳戶

集成信託計劃或行業計劃的任何成員，如欲選擇將其該計劃保留帳戶內持有的累算權益，轉移至他 / 她有資格加入的另一計劃內，可填妥本表格並交予有關承轉受託人。

5. 參與編號指強制性公積金計劃管理局發給參與僱主的參與證明書上的編號。
6. 如計劃成員因新加入計劃而未知悉新帳戶的號碼，可留空不填。