

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 "Easy Gold Plan" under the account(s) to be transferred, please complete and return the "Request for Transfer / Withdrawal Form (For "Easy Gold Plan")" ("the form") to give us instruction on the handling of your contributions made under "Easy Gold Plan". If we do not receive the form upon transfer of your accrued benefits, your contributions made under "Easy Gold Plan" will be transferred to / retained in the preserved account under the existing scheme.
若您欲轉移之帳戶內有「積·金·易」，請填寫並交回「轉移 / 提取表格(「積·金·易」適用)」以指示您的「積·金·易」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「積·金·易」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。
- Please mark "✓" in the appropriate box. 請於適用的方格內填上"✓"號。

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*)			
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				
Business 辦公室				
Residential 住宅				
Other Contact No. 其他聯絡號碼				
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}
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) 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。

(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

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 contributions made under "Easy Gold Plan" (if any) to an "Easy Gold Plan" account under a preserved account with the same scheme (Only applicable to age 65 or above)
 連同「積·金·易」(如有) 轉移至現有計劃的保留帳戶下之「積·金·易」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 備註

If no option is selected in item (2), please note that the fund transfer arrangement for the accrued benefits derived from voluntary contributions (except contributions made under "Easy Gold Plan"), if any, will be the same as that of mandatory contributions.

如成員於第(2)項未作出任何選擇，其自願性供款(「積·金·易」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 Authorisation 授權 (Please 請「✓」)

(Only applicable to fund transfer to Bank Consortium MPF Plan or Bank Consortium Industry Plan
只適用於資金轉移至銀聯信託強積金計劃或銀聯信託行業計劃)

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

I further authorise BCT to provide a copy of my identification document to the transferor 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 BCT to pass it to the transferor trustee if it is so required).

本人授權銀聯信託有限公司(「銀聯信託」)向轉移受託人索取有關本人之強積金帳戶的所須資料，並授權轉移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轉移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轉移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。(你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轉移受託人。)

Part IV. 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 Bank Consortium MPF Plan and / or the Bank Consortium Industry Plan and / or their dealing / transaction details will only be accessed and handled by properly authorised staff of BCT and its properly authorised service providers and may be used, disclosed and / or transferred (whether in or outside Hong Kong) to such persons as BCT or any of its service providers may consider necessary, including governmental authorities and regulators, and any of BCT's direct and indirect shareholders, subsidiaries and affiliated companies (and the subsidiaries and affiliated companies of the said shareholders including BCT Financial Limited) (collectively referred to as "BCT Related Companies") for any purpose of and / or in connection with (i) any service as may be provided to them such as provident fund services and financial advice / planning services including, but not limited to the processing, administering, managing, and analysing of their, as the case may be, contributions, accrued benefits and portfolios; (ii) furthering and / or improving the provision of services by BCT or BCT Related Companies to customers generally (including the facilitation of the provision of services to enable the customers of BCT or BCT Related Companies generally to access (provident fund or other) account details through the internet and / or automated teller machine networks such as JETCO); (iii) compliance with applicable laws and regulations, and / or (iv) any other purposes relating to the above. If there is any change in the information 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.

Members and Participating Employers have a right 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 BCT, 18/F Cosco Tower, 183 Queen's Road Central, Hong Kong.

由銀聯信託強積金計劃及 / 或銀聯信託行業計劃成員及參與僱主所提供或相關之個人資料及 / 或他們的買賣 / 交易細節僅供銀聯信託及其正式授權之服務供應商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、監管機構及任何銀聯信託直接及間接的股東、附屬公司及聯屬公司(及前述股東的附屬公司及聯屬公司包括銀聯金融有限公司)(全部被視為「銀聯信託相關公司」)為任何用途及 / 或有關於(一)任何可能向他們提供的服務，例如退休金服務及財務建議 / 財務計劃服務包括但不限於處理、掌管、管理及分析其視乎情況而定之供款、累積權益及投資組合；(二)進一步及 / 或提升銀聯信託或銀聯信託相關公司提供予客戶之一般服務(包括協助提供服務以令銀聯信託或銀聯信託相關公司之客戶可於互聯網及 / 或自動櫃員機網絡例如銀通處理(退休金或其他)戶口資料)；(三)遵守適用之法律及規例及 / 或(四)任何與上述有關之其他用途。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 V. 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 (in the same specimen of previous service provider)
申請人簽署(簽署式樣須與前服務提供者相同)

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

Member Hotline 成員熱線 : 2298 9333
Employer Hotline 僱主熱線 : 2298 9388
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Fax 傳真 : 2992 0809
Website 網址 : www.bcthk.com
Ver.6-01062011

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 “Easy Gold Plan”, a scheme member should transfer per each account of his / her accrued benefits therein in a lump sum. For benefits derived from “Easy Gold Plan”, 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
 - (e) (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「積·金·易」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「積·金·易」衍生之權益。
2. 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。
 3. 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。
 4. 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) 同一計劃內另一帳戶 (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。