

Note 注意

1. This form is for the set up of **new voluntary contribution arrangement** only. For changing the existing voluntary contribution arrangement, please use the "Information Update Form (For Participating Employer)". 此表格只適用於處理新設立之自願性供款。如欲更改現有之自願性供款，請填寫「資料更新表格(參與僱主適用)」。
2. Please mark "✓" in the appropriate box. 請於適用的方格內填上 "✓" 號。

Part I. Employer Details 僱主資料		
Name of Plan 計劃名稱	<input type="checkbox"/> Bank Consortium MPF Plan 銀聯信託強積金計劃	Participating Plan No. 參與計劃編號
	<input type="checkbox"/> Bank Consortium Industry Plan 銀聯信託行業計劃	
Name of Company 公司名稱	English	
	中文	
Contact Details 聯絡資料	Contact Person (Mr / Ms / Mrs*) 聯絡人(先生 / 小姐 / 女士*)	Telephone No. 電話號碼
	E-mail Address 電郵地址	Fax No. 傳真號碼

Part II. Details of Voluntary Contribution (basis of voluntary contribution of employer and employee must be the same) 自願性供款資料(僱主及僱員之自願性供款基準必須相同)				
Effective Date 生效日期 _____ (D/M/Y 日/月/年)				
Retirement Age 退休年齡				
<input type="checkbox"/> Normal Retirement Age 正常退休年齡 _____		<input type="checkbox"/> Early Retirement Age 提早退休年齡 _____		
Member Category and Vesting Scale of Contribution Rates 成員類別及供款比率歸屬表				
Member Category 成員類別	Description 描述	Employer Contribution Rate % 僱主供款率 %	Voluntary Contribution Commencement Date [▲] 自願性供款開始日期 [▲]	Vesting Scale Option 歸屬比例選擇 (Please refer to the table below) (請參考離職歸屬表)
A				<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4
B				<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4
C				<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4
▲ (i) Date employed 受僱日期 (ii) Date joined the Plan 參與計劃日期 (iii) Date after completion of three months' probation 完成三個月試用期 (iv) Others (please specify) 其他(請註明)				

Basis of Voluntary Contribution 自願性供款基準	
<input type="checkbox"/>	% x Basic Salary 供款率 x 基本入息
<input type="checkbox"/>	(% x Basic Salary) minus Employer's Mandatory Contribution (供款率 x 基本入息) 減去僱主強制性供款
<input type="checkbox"/>	% x (Basic Salary in excess of maximum level of Relevant Income**) 供款率 x (基本入息超過最高有關入息**)
<input type="checkbox"/>	% x Relevant Income** 供款率 x 有關入息**
<input type="checkbox"/>	(% x Relevant Income**) minus Employer's Mandatory Contribution (供款率 x 有關入息**) 減去僱主強制性供款
<input type="checkbox"/>	% x (Relevant Income** in excess of the maximum level of Relevant Income**) 供款率 x (有關入息超過最高有關入息**)
** "Relevant Income" has the meaning ascribed to the term by the Mandatory Provident Fund Schemes Ordinance as amended from time to time. 「有關入息」之定義已載於強制性公積金條例內並不時作出修訂。	

Vesting Scale for Leaving Service (not applicable to early retirement, retirement, death, total incapacity or dismissal) 離職歸屬表(不適用於因提早退休、退休、死亡、完全喪失行為能力或解僱)														
Completed Year Based On 完整年期基準		<input type="checkbox"/> Completed Years of Membership in the Participating Plan 參與計劃會籍整年期 <input type="checkbox"/> Completed Years of Service with the Employer 為僱主服務整年期												
Vesting Scale Option 歸屬比例選擇 (Please select an option where appropriate or specify at "Option 4") (請揀選適用的選擇或在「選擇4」註明)		Completed Year 完整年期												
		Option 選擇	0	1	2	3	4	5	6	7	8	9	10+	
		1	%	0	10	20	30	40	50	60	70	80	90	100
		2	%	0	0	0	30	40	50	60	70	80	90	100
		3	%	0	0	0	0	0	50	60	70	80	90	100
4	%													

* Delete as appropriate 請刪去不適用者



Part III. 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 Bank Consortium Trust Company Limited ("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有限公司(「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、管理及分析供款、累算權益及投資組合, 視乎情況而定;(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 IV. Declaration and Signature 聲明及簽署

- (1) I / We agree to comply with the obligations imposed on us as an employer under the Occupational Retirement Schemes Ordinance (Cap. 426) and Mandatory Provident Fund Schemes Ordinance (Cap. 485) and their related regulations, if applicable. I / We understand that the Participating Plan does not enable any person, without any consent of the Participating Plan's member concerned and any approval of the Mandatory Provident Fund Schemes Authority, to alter to the member's detriment either his accrued rights or his vested benefits under the Participating Plan. I / We also understand that such alteration can only take effect after obtaining the approval of the Mandatory Provident Fund Schemes Authority. I / We further undertake that whenever this circumstance occurs, I / we shall notify BCT as soon as reasonably practicable for the Mandatory Provident Fund Schemes Authority's approval.
- (2) I / We understand and agree to the terms of the Personal Information Collection Statement as set out in this form.
- (3) I / We declare that to the best of my / our knowledge and belief, the information given in this form and / or its attachment(s), if any, is correct and complete.

- (1) 本人 / 吾等同意遵守《職業退休計劃條例》(第426章)及《強制性公積金計劃條例》(第485章)及其有關規例中作為僱主之責任之規定, 如適用。本人 / 吾等明白該參與計劃的條款不會令任何人能夠未經該參與計劃的有關成員同意及任何在未經強制性公積金計劃管理局的批准下, 以對該成員不利的方式更改該成員在該參與計劃下的累算權益或既有利益。本人 / 吾等並明白有關更改必須經強制性公積金計劃管理局的批准後才能生效。如有上述情況, 本人 / 吾等並承諾會儘快通知銀聯信託, 以便向強制性公積金計劃管理局申請批核。
- (2) 本人 / 吾等明白及同意於此表格之收集個人資料聲明條款。
- (3) 本人 / 吾等聲明, 盡本人 / 吾等所知及所信, 本表格及隨附文件(如有)所提供的資料均屬正確無訛且並無缺漏。

S.V.

Authorised Signature(s) with Company Stamp (if applicable)
有效簽署及公司印章(如適用)

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: