

Form Guide for Claim Form for Payment of MPF Accrued Benefits (Benefits) on Grounds of Permanent Departure from Hong Kong / Total Incapacity / Terminal Illness / Small Balance / Death (For Scheme Member)

如何填寫「基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益(權益)的表格(計劃成員適用)」



BCT (MPF) Pro Choice / BCT (MPF) Industry Choice

BCT 積金之選 / BCT(強積金)行業計劃

FORM: ABD (MEM)-W(O)

Claim Form for Payment of MPF Accrued Benefits (Benefits) on Grounds of Permanent Departure from Hong Kong / Total Incapacity / Terminal Illness / Small Balance / Death (For Scheme Member)

基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益(權益)的表格(計劃成員適用)

Note 注意

Please read the following **important notes** before completing this form. 填寫本表格前，請先閱讀下列**重要資料**。

If a scheme member who has ceased employment wishes to claim the benefits from the scheme member's MPF contribution account on the ground elected by the scheme member on this form, the employer's written notification to the trustee in respect of the employee's cessation of employment is required. If the employer fails to do so, we may take follow-up actions and the claim processing on all MPF account(s) stated on the form may possibly be delayed. 若已離職的計劃成員以基於本表格上選擇的理由而打算提取有關之強積金供款帳戶中的權益，有關之僱主應向受託人以書面遞交該僱員的離職通知書。倘若僱主未能遞交，本公司可能採取跟進行動，有關表格上所列明的強積金帳戶之申索將可能會被延遲處理。

Filling In This Form 填寫表格

- This form is to be completed by any person who wishes to claim for payment of benefits from an MPF registered scheme (scheme) on the grounds of permanent departure from Hong Kong, total incapacity, terminal illness, small balance or death. For a claim for payment of benefits on the grounds of attaining the retirement age of 65 or early retirement, please use FORM: ABD (MEM)-W(R). 本表格僅供擬基於永久性地離開香港、完全喪失行為能力、罹患末期疾病、小額結餘或死亡的理由提出申索，要求從一個強積金註冊計劃(計劃)提取權益的人士填報。若基於已達到65歲退休年齡或提早退休的理由申索權益，請填寫表格：ABD (MEM)-W(R)。
- If the claimant / scheme member wishes to withdraw benefits from more than one scheme, please fill in a separate form for each scheme. 如申索人 / 計劃成員擬從多於一個計劃提取權益，須就每個計劃填寫一份表格。
- Please submit the completed form and the required supporting documents to the trustee of the scheme concerned for processing the claim. If any information provided is incorrect or incomplete, the relevant trustee may not be able to process your request. 請把填妥的表格及所需證明文件交予有關計劃的受託人，以便處理有關申索。若提供的任何資料不正確或不完整，有關受託人可能無法處理您的申請。
- Please read the explanatory notes carefully before completing this form. 填寫本表格前，請先細讀註釋。
- The personal data to be supplied in support of this claim for payment of benefits are to be used for processing your claim. The personal data you supply may, for such purpose, be transferred to the relevant service provider(s) and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority (the Authority). 就此項申索權益申請提供的個人資料，將用作處理您的申索。您提供的個人資料可能會為該目的而轉交相關服務提供者及政府或規管機構，包括強制性公積金計劃管理局(「管理局」)。
- Please countersign any alterations made in this form. 如須作出任何刪改，請於刪改之位置旁簽署。
- Please mark "✓" in the appropriate box. 請於適用的方格內填上「✓」號。
- Please send the completed form to "Pension Services, Bank Consortium Trust Company Limited, 18/F Cosco Tower, 183 Queen's Road Central, Hong Kong". 請將填妥表格寄往「香港皇后大道中183號中遠大廈18樓，銀聯信託有限公司，退休金服務」收。

Reminder Before Submitting a Claim 提交申索前須注意的事項

- Withdrawal of benefits derived from voluntary contributions paid pursuant to section 11 of the Ordinance is subject to the governing rules of the scheme concerned. Please check the information from the offering document of the scheme concerned, which can be found on the website of the trustee of the scheme concerned. Please consult the relevant trustee for details. 就依據《條例》第11條支付的自願性供款所產生的權益而言，提取權益須受有關計劃的管限規則所規限。詳情請查閱有關計劃的要約文件，而要約文件可於有關計劃受託人的網站閱覽。詳情請向有關受託人查詢。
- Withdrawal of benefits derived from tax deductible voluntary contributions paid pursuant to section 11A of the Ordinance is subject to the same withdrawal requirements as for mandatory contributions (except that under section 11A(3), certain provisions relating to offsetting of severance or long service payments, and protection of benefits from creditors and others, do not apply). 就依據《條例》第11A條存入的可扣稅自願性供款所產生的權益而言，提取權益須受與強制性供款相同的提取規定所規限(惟根據第11A(3)條，若干與抵銷遣散費或長期服務金有關，以及與保障債權人及其他人士的權益有關的條文並不適用)。

Reminder 請注意

- Withdrawal of benefits out of a 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 scheme or consult the relevant trustee for details. 若從保證基金提取權益，可能導致計劃成員不符合部分或所有保證條件，以致影響其享有保證的資格。詳情請查閱計劃的要約文件或向有關受託人查詢。
- The price of fund units may change due to market fluctuations and may go down as well as up. The price of fund units on the date when you submit a claim form to the trustee may be different from that on the date when the fund units are redeemed. 基金單位價格會因市場波動而出現變化，單位價格可跌亦可升。您向受託人提交申索表格當日的基金單位價格，或會與贖回基金單位當日的價格有所不同。
- If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the default investment strategy (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 investments in the DIS and your claim for payment of benefits take place at around the same time, the trustee of the scheme shall sequence the de-risking and the claim in accordance with its procedures and in compliance with the Ordinance. Please consult the trustee of the scheme if you wish to know the details of how it will handle these transactions. 如您已年滿或快將年滿50歲，而現時您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。如計劃的受託人在預設投資策略下按年降低您的投資風險的時間，與接獲您的申索權益申請的時間相當接近，該計劃的受託人將根據其運作程序及在符合《條例》規定的情況下，訂定處理降低風險及申索權益的次序。如欲瞭解計劃受託人如何處理該等交易，請向受託人查詢詳情。

Plan Sponsor 計劃保薦人：BCT Financial Limited 銀聯金融有限公司
Trustee & Administrator 受託人及行政管理人：Bank Consortium Trust Company Limited 銀聯信託有限公司

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如何填寫「基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益(權益)的表格(計劃成員適用)」

FORM: ABD (MEM)-W(O)

Part I. Details of Scheme Member / Claimant ^{Note 1} 計劃成員 / 申索人 ^{註1} 資料				
Name of the Scheme Member ^{Note 2} (as shown on your Hong Kong Identity (HKID) Card) 計劃成員姓名 ^{註2} (與您的香港身份證上的姓名相同)		English (Mr / Ms / Mrs*) Chan Tai Man		HKID Card No. 香港身份證號碼 A123456(7)
		中文 (先生 / 女士 / 太太*) 陳太文		Passport No. (ONLY for scheme member without HKID Card) 護照號碼 (本欄僅供沒有香港身份證的計劃成員填寫)
Name of the Claimant ^{Note 2} (if different from scheme member stated above) (as shown on your Hong Kong Identity (HKID) Card) 申索人姓名 ^{註2} (如與上述計劃成員不同者) (與您的香港身份證上的姓名相同)		HKID Card No. 香港身份證號碼		
		Passport No. (ONLY for person without HKID Card) 護照號碼 (本欄僅供沒有香港身份證的人士填寫)		
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			9 0 0 0 0 0 0 1	
Business 辦公室			2 2 9 8 9 3 3 3	
Residential 住宅			2 2 9 8 9 3 3 2	
China / Overseas 中國 / 海外				
E-mail Address 電郵地址		taiman@yahoo.com.hk		
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) Flat A, 10/F, Bk 2, Cosco Building, 183 Queen's Road, Sheung Wan, Hong Kong				

Part II. Details of the Claim 申索資料				
Name of the Scheme and Participating Plan No. against which payment to be claimed 要求支付權益的計劃名稱及參與計劃編號				
Name of Scheme 計劃名稱	<input checked="" type="checkbox"/> BCT (MPF) Pro Choice BCT 積金之選	<input type="checkbox"/> BCT (MPF) Industry Choice BCT (強積金) 行業計劃		
<input type="checkbox"/> All accounts under the Scheme 計劃內所有帳戶				
<input type="checkbox"/> Selected account(s) under the Scheme (please specify the Participating Plan No. ^{Note 3} and Membership No. ^{Note 3}) 計劃內的指明帳戶 (請註明參與計劃編號 ^{註3} 及成員編號 ^{註3})				
Participating Plan No. ^{Note 3} 參與計劃編號 ^{註3}	(1) BCM 00001234567 (2)	(1) (2)		
Membership No. ^{Note 3} (if applicable) 成員編號 ^{註3} (如適用)	(1) 26 (2)	(1) (2)		
(i) Are there any voluntary contributions? 帳戶內有沒有自願性供款? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (Please go to PART III) 有 沒有 (請跳至第 III 部)				
(ii) I elect to have the benefits derived from voluntary contributions to be: 本人選擇把由自願性供款衍生的權益作出以下的安排: <input type="checkbox"/> retained in the existing account of the current scheme 保留在現有計劃的帳戶內 <input checked="" type="checkbox"/> handled in the same way as those derived from mandatory contributions and withdrawn in accordance with the governing rules of the scheme 以處理強制性供款衍生的累算權益的同樣方式處理及根據計劃的管限規則提取權益				
<p>Note : If no option is selected in item (ii), please note that the arrangement for the benefits derived from voluntary contributions, if any, will be the same as that of mandatory contributions and withdrawn in accordance with the governing rules of the scheme.</p> <p>備註 : 如成員未有在第 (ii) 項作出任何選擇, 其自願性供款所衍生的權益 (如有), 將與強制性供款所衍生的權益的安排相同及根據計劃的管限規則提取權益。</p>				
<p>Important Notes 重要提示</p> <ul style="list-style-type: none"> If the account that to be withdrawn, which contains investment in 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. 若支付權益帳戶當中的投資含有預設投資, 當該帳戶的權益正待, 轉移至其他計劃或全數提取, 該週年降低投資於預設投資風險的指示將不會執行。 If the account that to be withdrawn, which contains investment in DIS and there is one or more of other transaction(s) is being processed, the annual de-risking of investment in DIS will be DEFERRED, it normally takes place on the next available dealing day after completion of such transaction(s); and vice versa. 若支付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, 該週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。 If the account that to be withdrawn, which contains investment in DIS, the annual de-risking of investment in DIS will be DEFERRED, it normally takes place on the next available dealing day after completion of the partial benefits withdrawal, when both transactions fall on the same day. 若支付權益帳戶當中的投資含有預設投資, 該週年降低投資於預設投資風險的指示將順延執行, 一般在提取部份權益完成後下一個交易日執行, 當兩者交易日適逢同一日。 				

* Delete as appropriate 請刪去不適用者

Please fill in your Personal Information.
請填寫個人資料。

Please select your Scheme Name.
請選擇計劃名稱。

To withdraw benefits from all accounts under the Scheme, please select "All accounts under the Scheme" under Part II.
擬從所有帳戶提取權益, 請於第 (II) 部選擇「計劃內所有帳戶」。

To withdraw benefits from the designated account(s), please fill in the Participating Plan No. and the Membership No. of the relevant account(s).
擬從指定帳戶提取權益, 請填寫有關參與計劃編號及成員編號。

If there are benefits derived from Voluntary Contributions in the MPF Account, please select "Yes" under Part (i), and then please select relevant arrangement of the Voluntary Contributions under Part (ii).
如成員帳戶內有由自願性供款所產生的權益, 請於第 (i) 部選擇「有」, 然後於第 (ii) 部選擇有關自願性供款之安排。

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FORM: ABD (MEM)-W(O)

Part III. Grounds for Claiming Benefits and the Required Documents <small>Notes 4 & 5</small> (Please "✓" the appropriate box) 申索權益的理由及所需文件 <small>註4及註5</small> (請在適當的方格內填上「✓」號)	
Grounds 理由	Required documents 所需文件
<input checked="" type="checkbox"/> Permanent departure from Hong Kong 永久性地離開香港	<div style="display: flex;"> <div style="flex: 1;"> <input checked="" type="checkbox"/> a copy of the scheme member's HKID card for verification of the name and identity card number of the scheme member if the claimant does not wish to present the card in person for verification <small>Note 6</small>; 計劃成員的香港身份證副本，以供核對其姓名及身份證號碼(如不擬親身出示計劃成員的香港身份證供核對有關資料) <small>註6</small>; <input type="checkbox"/> a copy of the documents / evidence that the scheme member is permitted to reside in a place other than Hong Kong (e.g. immigration visa / foreign passport); 准予計劃成員在香港以外某地方居住的文件 / 證明文件副本(例如移民簽證 / 外國護照); <input type="checkbox"/> the original statutory declaration form on permanent departure [Form MPF(S) – W(SD2)] <small>Notes 5 & 7</small>; 有關永久性地離開香港的法定聲明表格[第MPF(S) – W(SD2)號表格] <small>註5及註7</small> 正本; <input type="checkbox"/> a copy of the Letter of Release issued by the Inland Revenue Department, if applicable; and 稅務局發出的同意釋款書副本(如適用); 及 <input type="checkbox"/> information on overseas settlement 海外定居資料 </div> <div style="flex: 1; border: 1px solid black; padding: 2px;"> <div style="display: flex; justify-content: space-between;"> <div>Place other than Hong Kong where the scheme member is permitted to reside 計劃成員在香港以外獲准居住的國家：</div> <div></div> </div> <div>Address 地址：</div> <div>Telephone No. 電話號碼：</div> <div>Fax No. 傳真號碼：</div> <div>E-mail Address 電郵地址：</div> <div>Departure Reason(s) 離港原因：</div> <div style="display: flex; justify-content: space-between; font-size: small;"> <div> <input type="checkbox"/> Emigration 移民 <input type="checkbox"/> Retirement 退休 <input type="checkbox"/> Others (please specify): 其他(請註明)： </div> <div> <input type="checkbox"/> Family reunion 家庭團聚 <input type="checkbox"/> Long-term overseas employment 長期海外受聘 </div> <div> <input type="checkbox"/> Marriage 結婚 </div> </div> </div> </div>
<input type="checkbox"/> Total incapacity 完全喪失行為能力	<input type="checkbox"/> a copy of the scheme member's HKID card for verification of the name and identity card number of the scheme member if the claimant does not wish to present the card in person for verification <small>Note 6</small> ; and 計劃成員的香港身份證副本，以供核對其姓名及身份證號碼(如不擬親身出示計劃成員的香港身份證供核對有關資料) <small>註6</small> ; 及 <input type="checkbox"/> a copy of the medical certificate certifying total incapacity [Form MPF(S) – W(M)] <small>Notes 8 & 9</small> 證明計劃成員完全喪失行為能力的醫學證明書 [第MPF(S) – W(M)號表格] <small>註8及註9</small> 副本
<input type="checkbox"/> Terminal illness <small>Note 10</small> 罹患末期疾病 <small>註10</small>	<input type="checkbox"/> a copy of the scheme member's HKID card for verification of the name and identity card number of the scheme member if the claimant does not wish to present the card in person for verification <small>Note 6</small> ; and 計劃成員的香港身份證副本，以供核對其姓名及身份證號碼(如不擬親身出示計劃成員的香港身份證供核對有關資料) <small>註6</small> ; 及 <input type="checkbox"/> a copy of the medical certificate certifying terminal illness dated not earlier than 12 months before the date on which the claim is lodged [Form MPF(S) – W(T)] <small>Note 8</small> 在提交申索日期之前的12個月內簽發的證明計劃成員罹患末期疾病的醫學證明書[第MPF(S) – W(T)號表格] <small>註8</small> 副本
<input type="checkbox"/> Small balance 小額結餘	<input type="checkbox"/> a copy of the scheme member's HKID card for verification of the name and identity card number of the scheme member if the claimant does not wish to present the card in person for verification <small>Note 6</small> ; and 計劃成員的香港身份證副本，以供核對其姓名及身份證號碼(如不擬親身出示計劃成員的香港身份證供核對有關資料) <small>註6</small> ; 及 <input type="checkbox"/> the original statutory declaration form on small balance [Form MPF(S) – W(SD3)] <small>Notes 5 & 7</small> 有關小額結餘的法定聲明表格[第MPF(S) – W(SD3)號表格] <small>註5及註7</small> 正本
<input type="checkbox"/> Death 死亡	<input type="checkbox"/> a copy of the claimant's HKID card for verification of the name and identity card number of the claimant if the claimant does not wish to present the card in person for verification <small>Note 6</small> ; and 申索人的香港身份證副本，以供核對其姓名及身份證號碼(如不擬親身出示申索人的香港身份證供核對有關資料) <small>註6</small> ; 及 <input type="checkbox"/> a copy of the Letter of Probate or Letters of Administration granted by the Probate Registry / a letter requesting withdrawal of the benefits issued by the Official Administrator if the claim is made by the Official Administrator* 遺產承辦處發出的遺囑認證書或遺產管理書副本 / (如申索是由遺產管理官提出)遺產管理官發出要求提取權益的信件*

Part IV. Method of Payment 付款方式
 The payment will be sent to your correspondence address stated in Part I by cheque.
 款項將以支票形式寄往您於第I部所提供之通訊地址。

* Delete as appropriate 請刪去不適用者

Please select the relevant grounds for claiming accrued benefits and provide the required documents corresponding to the grounds selected together with this Form.
請選擇申索權益之理由及隨此表格附上有關申索之所需證明文件。

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FORM: ABD (MEM)-W(O)

Part V. 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 BCT (MPF) Pro Choice and / or the BCT (MPF) Industry Choice (collectively referred as the "Schemes") (concerning application records and operational records and / or their dealing / transaction details records) will only be accessed and handled by properly authorised staff of Bank Consortium Trust Company Limited ("BCTC", the trustee of the Schemes), BCT Financial Limited ("BCTF", the sponsor of the Schemes) and their properly authorised service providers and agents, and may be used, disclosed and / or transferred (whether in or outside Hong Kong) to such persons as BCTC or any of its service providers may consider necessary, including governmental authorities and regulators, for any of the following purposes: (i) exercising or performing the functions conferred or imposed by or under or for the purposes of the Mandatory Provident Fund Schemes Ordinance ("Ordinance"); (ii) providing Mandatory Provident Fund services including the processing, administering, managing, and analysing of their, as the case may be, contributions, accrued benefits and portfolios and direct marketing of Mandatory Provident Fund services (and ancillary MPF products); (iii) improving the provision of Mandatory Provident Fund services by BCTC to customers generally (including the facilitation of the provision of Mandatory Provident Fund services to enable the customers of BCTC generally to access Mandatory Provident Fund (or other) account details through the internet or other means); (iv) compliance with applicable laws and regulations, and court order and / or (v) any other purposes for the exercise or performance of the above mentioned functions. If there is any change in the information provided, BCTC should be notified as soon as practicable. Failure to provide the information requested may result in BCTC being unable to process the instructions.

由BCT積金之選及 / 或BCT(強積金)行業計劃(統稱為「強積金計劃」)成員及參與僱主所提供或相關之個人資料(有關申請及運作記錄)及 / 或他們的買賣 / 交易細節記錄僅供銀聯信託有限公司(「銀聯信託」, 強積金計劃之受託人)、銀聯金融有限公司(「銀聯金融」, 強積金計劃之保薦人)及它們正式授權之服務供應商及代理之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, 包括政府機關及監管機構作以下列任何之目的: (一)行使或執行強制性公積金計劃條例(「條例」)下所授予或施加之職能或根據該條例的目的而行使或執行職能; (二)提供強制性公積金的服務包括處理、掌管、管理及分析供款、累算權益及投資組合, 視乎情況而定, 及直銷強制性公積金服務(及有關強積金的產品); (三)改善銀聯信託提供予客戶一般之強制性公積金服務(包括協助提供強制性公積金服務以令銀聯信託之客戶可於互聯網或其他途徑處理強制性公積金(或其他)戶口資料); (四)遵守適用之法律及規例及法院命令及 / 或(五)任何以行使或執行上述職能作目的之用途。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。

Members and Participating Employers have a right, without any charge, 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 BCTC, 18/F Cosco Tower, 183 Queen's Road Central, Hong Kong.

成員及參與僱主, 在不設任何收費下, 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 VI. Authorisation and Declaration 授權及聲明

(1) Termination of MPF Account with No Residual Balance (If applicable) 終止沒有剩餘款項的強積金帳戶(如適用)

I / We* ^{Note 1} hereby authorise the trustee to terminate the relevant scheme member account(s) as referred to in Part II upon 本人 / 吾等* ^{註1} 謹此授權受託人在以下情況終止在II部所述的計劃成員帳戶:

- (i) withdrawal of the full amount of benefits with no residual balance in the said account(s); 該帳戶內的權益已被全數提取, 並無剩餘款項;
- (ii) (for employee contribution account only) termination of the employment in relation to the contribution account; and (只適用於僱員供款帳戶)該供款帳戶所涉及的受僱已經終止; 及
- (iii) (for self-employed person contribution account only) cessation of the self-employment, with effect from (DD/MM/YYYY). (只適用於自僱人士供款帳戶)終止自僱, 生效日期為 (日/月/年)。

(2) For Claim for Payment of Benefits on Grounds of Total Incapacity only 只適用於基於完全喪失行為能力的理由而要求支付權益的申索

For the claim for payment of benefits on the grounds of total incapacity, I / we* ^{Note 1} hereby declare that I / the scheme member* last performed the relevant kind of work as set out in the medical certificate [Form MPF(S)-W(M)] before becoming totally incapacitated or the "Certificate of employee's permanent unfitness for a particular type of work" ^{Note 9} and that contract of employment has been terminated. 本人 / 吾等* ^{註1} 謹此就基於完全喪失行為能力的理由而要求支付權益的申索作出聲明, 本人 / 計劃成員*在完全喪失行為能力前, 最後從事的工作證明書[第MPF(S)-W(M)號表格]或「證明僱員永久不適宜擔任某類工作的證明書」^{註9}所載有關類別的工作, 而該僱傭合約已經終止。

(3) Declaration 聲明

- (i) I / We* ^{Note 1} understand and agree to the terms of the Personal Information Collection Statement as set out in this form. I / We* ^{Note 1} agree that the information and data given in this form, together with the document(s) enclosed (if any), can be used by the approved trustee concerned and the Authority in activities relating to the processing of the claim and may be disclosed to other parties for such purposes. 本人 / 吾等* ^{註1} 明白及同意於此表格之收集個人資料聲明條款。本人 / 吾等* ^{註1} 同意本申索表格所填報的個人資料及隨附之文件(如有)可供有關的核准受託人及管理當局作處理申索的用途, 並可為此用途向其他人士披露。
- (ii) I / We* ^{Note 1} undertake that if there is any change in the information so provided, we* shall notify BCTC as soon as reasonably practicable. 本人 / 吾等* ^{註1} 承諾若所提供之資料有任何更改, 將儘快通知銀聯信託。
- (iii) I / We* ^{Note 1} declare that to the best of my / our* knowledge and belief, the information given in this form and its attachments (if any) is correct and complete. 本人 / 吾等* ^{註1} 聲明, 盡本人 / 吾等* 所知所信, 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。

Man

S.V.

01 / 04 / 2022

Signature of the Claimant(s)
申索人簽署

Date (D / M / Y) 日期(日 / 月 / 年)

Warning : Under section 43E of the Ordinance, a person who, in any document given to the Authority or an approved trustee, knowingly or recklessly makes a statement which is false or misleading in a material respect commits an offence and is liable to a maximum penalty of a \$100,000 fine and one year's imprisonment on the first conviction and a \$200,000 fine and two years' imprisonment on each subsequent conviction. A person who knowingly and wilfully makes a statutory declaration false in a material particular also commits an offence under section 36 of the Crimes Ordinance (Cap. 200) and is liable on conviction to imprisonment for two years and to a fine.

注意 : 根據《條例》第43E條, 任何人在給予管理局或核准受託人的任何文件中, 明知或罔顧後果地作出在要項上屬虛假或具誤導性的陳述, 即屬犯罪。首次定罪者, 最高可處罰款\$100,000及監禁一年; 其後每次定罪, 最高可處罰款\$200,000及監禁兩年。根據《刑事罪行條例》(第200章)第36條, 任何人明知而故意在法定聲明中作出在要項上屬虛假的陳述, 亦屬犯罪。一經定罪, 可處監禁兩年及罰款。

* Delete as appropriate 請刪去不適用者

Internal Use Only 內部專用

Date Received: () Processed By: () Approved By: () Remarks:

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

Fax 傳真 : 2992 0507
Website 網址 : www.bctn.com

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For Scheme Member / Claimant(s), please sign on the space provided in the Form. For scheme member, your signature must be the same as shown on the Member Enrolment Form. 請計劃成員 / 申索人於此欄簽署。計劃成員簽署必須與成員參加表格上的簽署式樣相同。

Please fill in the completion date of this Form. 請填寫填表日期。

Form Guide for Claim Form for Payment of MPF Accrued Benefits (Benefits) on Grounds of Permanent Departure from Hong Kong / Total Incapacity / Terminal Illness / Small Balance / Death (For Scheme Member)

如何填寫「基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益(權益)的表格(計劃成員適用)」

FORM: ABD (MEM)-W(O)

Claim Form for Payment of MPF Accrued Benefits (Benefits) on Grounds of Permanent Departure from Hong Kong / Total Incapacity / Terminal Illness / Small Balance / Death (For Scheme Member) [FORM: ABD (MEM)-W(O)]

Explanatory Notes

1. I. For a claim made on the grounds of death, only personal representatives within the meaning of the Mandatory Provident Fund Schemes Ordinance can be the claimant to act on behalf of the deceased scheme member to claim for payment of the scheme member's benefits. This includes a personal representative within the meaning of the Probate and Administration Ordinance (Cap. 10) and the Official Administrator who gets in and administers an estate of a deceased scheme member in a summary manner without a grant or other legal formality under section 15 of that Ordinance. If there is more than one personal representative and the personal representatives have not authorised one of the representatives to act on behalf of other representatives to lodge the claim, all the personal representatives should submit the Claim Form jointly. Please use an additional blank sheet to provide details of the claimants under Part I. Under such circumstances, this form needs to be signed by all of the personal representatives.
 - II. For a claim made on all other grounds of permanent departure from Hong Kong, total incapacity, terminal illness or small balance, either the scheme member or person(s) appointed as a committee of the estate of a mentally incapacitated person under the Mental Health Ordinance (Cap. 136) (the committee of the estate) to act on behalf of the scheme member can be the claimant to lodge the claim for payment of benefits. If there is more than one person appointed by the court as the committee of the estate, those persons should apply and sign in the capacity as the committee of the estate in accordance with those terms of appointment and any other requirements contained in the relevant court order. Please use an additional blank sheet to provide details of the claimants under Part I. Under such circumstances, this form needs to be signed by all of the persons appointed by the court as the committee of the estate, unless the Court authorises otherwise.
2. If a claimant / scheme member does NOT possess a HKID card, please fill in the name as shown on the passport.
 3. Participating Plan No. and Membership No. can be found:
 - I. in the membership certificate, notice of acceptance, or notice of participating; or
 - II. in the Member Benefits Statement (Annual), or other statements provided by the trustee; or
 - III. through the member enquiry facilities available from the trustee.If you are in doubt, please contact the trustee of the MPF registered scheme (scheme) concerned.
 4. In processing a claim for payment, the trustee of the scheme concerned may request the claimant to produce the original documents for checking purpose, if necessary.
 5. For a claim made by the committee of the estate on behalf of the scheme member, in addition to the required documents in respect of the scheme member, the following documents should be enclosed:
 - I. a copy of the evidence of the status of the committee of the estate, i.e. the court order;
 - II. a copy of each claimant's HKID card for verification of the name and identity card number of the claimant if the claimant does not wish to present the card in person for verification ^{Note 6}; and
 - III. the original statutory declaration form made by the committee of the estate for a claim for payment of benefits [MPF(S) – W(SD4)] ^{Note 7} (if applicable). Where such a statutory declaration has been made and enclosed with the claim, the statutory declaration form [MPF(S) – W(SD2) and MPF(S) – W(SD3)] for claims made on the grounds of permanent departure from Hong Kong and small balance respectively shall not be required.
 6. For a claimant / scheme member who does NOT possess a HKID card, a copy of the passport (only pages with personal particulars and passport number) should be provided to the trustee concerned for verification of the name and passport number of the claimant / scheme member if the claimant / scheme member does not wish to present the passport in person for verification.
 7. The statutory declaration must be a valid statutory declaration in the place where the declaration is made (e.g. in Hong Kong, the statutory declaration should be made before and signed by a Commissioner for Oaths (e.g. at a Public Enquiry Service Centre of the Home Affairs Department) or a Notary Public or a Justice of the Peace). A statutory declaration made in a place other than Hong Kong is also acceptable provided that it is made before and signed by a Notary Public or a person authorised under the law of that place to administer an oath or take a statutory declaration.
 8. A medical certificate certifying total incapacity [Form MPF(S) – W(M)] or terminal illness [Form MPF(S) – W(T)] shall be signed by a medical practitioner who must be *either* –
 - I. a registered medical practitioner who is registered under the Medical Registration Ordinance (Cap. 161), i.e.,
 - (i) a person who is duly registered as a medical practitioner with the Medical Council of Hong Kong; or
 - (ii) a person who is deemed to be registered as a medical practitioner under the Medical Registration Ordinance (Cap. 161) (i.e. persons who are exempted from registration);
 - or
 - II. a registered Chinese medicine practitioner, within the meaning assigned to it by section 2(1) of the Chinese Medicine Ordinance (Cap. 549).
 9. For a claim made on the grounds of total incapacity, the claimant shall ask a medical practitioner to fill in the Form MPF(S) – W(M) and attach it to the FORM: ABD (MEM)-W(O).

For a claimant who also claims long service payment on the grounds of permanent unfitness for his present job under the Employment Ordinance (Cap. 57), the claimant may use the form "Certificate of an employee's permanent unfitness for a particular type of work" under that Ordinance to substitute for the Form MPF(S) – W(M) for the purpose of claiming payment of MPF benefits on the grounds of total incapacity.
 10. For a claim made by a scheme member for payment of benefits from a contribution account on the grounds of terminal illness, the scheme member may continue his current employment or current self-employment after he has received the payment of benefits. In that case, future contributions made by the employer (both employer and employee portions) or by the self-employed person himself will continue to be made to the contribution account. If the scheme member wishes to withdraw the benefits derived from future contributions and transfer-in benefits (if any) in the contribution account again, he should lodge another claim for payment of benefits.

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Form Guide for Claim Form for Payment of MPF Accrued Benefits (Benefits) on Grounds of Permanent Departure from Hong Kong / Total Incapacity / Terminal Illness / Small Balance / Death (For Scheme Member)

如何填寫「基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益(權益)的表格(計劃成員適用)」

FORM: ABD (MEM)-W(O)

基於永久性地離開香港 / 完全喪失行為能力 / 罹患末期疾病 / 小額結餘 / 死亡的理由而申索強積金累算權益(權益)的表格(計劃成員適用)[表格：ABD (MEM)-W(O)]

註釋

1. I. 基於死亡的理由而提出的權益申索，只可由《強制性公積金計劃條例》所界定的遺產代理人作為申索人，代表已故計劃成員提出。這些人包括由《遺囑認證及遺產管理條例》(第10章)所界定的遺產代理人及按該條例第15條，在無須任何授予書或其他法律手續的情況下，將已故計劃成員的遺產收集及以簡易方式管理的遺產管理官。假如遺產代理人超過一名，而該些遺產代理人並未授權其中一人作為申索代表，則申索表格須由所有遺產代理人聯名提交。請就第I部另紙詳載各申索人的資料。在這種情況下，本表格須由所有遺產代理人聯署。
- II. 基於所有其他理由(即永久性地離開香港、完全喪失行為能力、罹患末期疾病或小額結餘)而要求支付權益的申索，可由計劃成員或根據《精神健康條例》(第136章)獲委任代表精神上無行為能力的計劃成員行事的產業受託監管人(產業受託監管人)作為申索人提出。如法庭委任超過一人為產業受託監管人，該等人士應按照委任條款及有關法庭命令所載的任何其他規定，以產業受託監管人的身份提出申請及在相關文件簽署。請就第I部另紙詳載各申索人的資料。在此情況下，除非法庭另有授權，否則本表格須由所有獲法庭委任為該計劃成員的產業受託監管人的人士簽署。
2. 如申索人 / 計劃成員沒有香港身份證，請填上護照上的姓名。
3. 參與計劃編號及成員編號可循以下途徑查閱 / 查詢：
 - I. 查閱成員證明書、接納通知或參與通知；或
 - II. 查閱成員權益報表(周年)或受託人提供的其他報表；或
 - III. 受託人為成員提供的諮詢服務。如有疑問，請聯絡有關強積金註冊計劃(計劃)的受託人。
4. 如有需要，有關計劃的受託人在處理付款申索時可能會要求申索人提交文件的正本，以核對資料。
5. 由產業受託監管人代表計劃成員提出的申索，除須提供有關該計劃成員的所需文件外，亦應夾附以下文件：
 - I. 產業受託監管人身份的證明文件副本，即法庭命令的副本；
 - II. 每名申索人的香港身份證副本，以供核對其姓名及身份證號碼(如不擬親身出示申索人的香港身份證供核對有關資料)^{註6}；及
 - III. 產業受託監管人就申索權益所作的法定聲明表格[第MPF(S) – W(SD4)號表格]^{註7}正本(如適用)。如使用該表格作出聲明並把該表格夾附於本申索，便無須提交基於永久性地離開香港及小額結餘的理由作出申索的法定聲明表格[即第MPF(S) – W(SD2)號表格及第MPF(S) – W(SD3)號表格]。
6. 如申索人 / 計劃成員沒有香港身份證，而又不擬親身出示護照以供核對資料，則須提供護照副本(只須提供載有個人資料及護照號碼之頁)，以供受託人核對申索人 / 計劃成員的姓名及護照號碼。
7. 法定聲明必須是一份屬該聲明宣誓所在地有效的法定聲明(例如在香港，法定聲明須在監督員(例如在民政事務總署諮詢服務中心)或公證人或太平紳士面前作出，並由他們簽署)。在香港以外地方所作的法定聲明，只要是在公證人或獲該地方法律授權監督或監理法定聲明的人士面前作出，並由他們簽署，亦可予接受。
8. 證明計劃成員完全喪失行為能力的醫學證明書[第MPF(S) – W(M)號表格]或罹患末期疾病的醫學證明書[第MPF(S) – W(T)號表格]須由下述醫生簽署：
 - I. 根據《醫生註冊條例》(第161章)註冊的註冊醫生，即：
 - (i) 在香港醫務委員會正式註冊為醫生的人；或
 - (ii) 獲視作為根據《醫生註冊條例》(第161章)註冊成為醫生的人(即獲豁免無須註冊的人)；
 - 或
 - II. 《中醫藥條例》(第549章)第2(1)條所界定的註冊中醫。
9. 基於完全喪失行為能力的理由而提出的權益申索，申索人須請醫生填寫第MPF(S) – W(M)號表格並夾附於表格：ABD (MEM)-W(O)。
- 申索人如按《僱傭條例》(第57章)的規定，以永久不適合擔任其現時工作為理由同時申索長期服務金，則可採用按該條例填寫的「證明僱員永久不適合擔任某類工作的證明書」，替代填寫第MPF(S) – W(M)號表格，以提出基於完全喪失行為能力的理由而支付強積金權益的申索。
10. 計劃成員如基於罹患末期疾病的理由而要求從供款帳戶提取權益，該計劃成員在獲支付權益後，可能繼續從事其現時的受僱或自僱工作。在此情況下，僱主日後作出的供款(包括僱主及僱員部分)或該自僱人士日後作出的供款，將繼續分配至該供款帳戶。計劃成員如欲再度從該供款帳戶提取由未來供款及轉入的權益(如有)所產生的權益，須另行提出權益的申索。

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