



BCT Premier Pooled ORSO Retirement Plan
銀聯信託超卓匯集退休計劃
Deferred Withdrawal of Benefits Application Form
延遲提取權益申請表格

FORM: DR (REE) - ORSO

Note 注意

1. Please read the below Terms and Conditions carefully before completing this Form. 請於填寫此表格前細閱以下之條款。
2. 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。
3. Your contact information provided hereunder will supersede previous record(s) and will be updated to BCT's system. Please provide the latest information for future contact. 閣下以下提供的聯絡資料將更新並取代銀聯信託系統內的記錄。請提供最新資料以便日後聯絡。
4. Please complete and return this Form to the employer at least 7 working days before your last employment date. 請閣下於離職前至少7個工作天將填妥之表格交回僱主。

Part I. Employer / Employee Details 僱主 / 僱員資料		
Name of Company 公司名稱		
English 英文 _____		
Chinese 中文 _____		
Participating Plan No. 參與計劃編號		
Name of Employee 僱員姓名	English (Mr / Ms / Mrs*) 英文(先生 / 小姐 / 太太*)	HKID Card No. 香港身份證號碼
	Chinese (Mr / Ms / Mrs*) 中文(先生 / 小姐 / 太太*)	Passport No. (ONLY for member without HKID Card) 護照號碼(本欄僅供沒有香港身份證的成員填寫)
Contact Phone No. 聯絡電話號碼	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. Terms and Conditions 條款
<p>1. Deferred Withdrawal of Benefits Application is only applicable to your vested benefits in BCT Premier Pooled ORSO Retirement Plan ("the Plan"). You are allowed to retain the accrued vested benefits in unit holdings under the Plan for the deferred period as agreed between the Participating Employer and the Trustee upon successful application. You will receive a confirmation letter notifying the end date of the deferred period.</p> <p>延遲提取權益申請只適用於閣下在銀聯信託超卓匯集退休計劃「本計劃」之歸屬權益。成功申請後，閣下可暫不贖回所持有之歸屬權益基金單位，延遲提取權益期將根據參與僱主與信託人所同意的年期為限，閣下並會收到延遲提取權益期結束日的確認信。</p>
<p>2. Notwithstanding any other provision in this Form, to the extent that you are entitled to any long service or severance payment under the Employment Ordinance (a "Statutory Payment"), you acknowledge and agree that a portion of your vested benefits derived from employer contributions and equal to the amount of such Statutory Payment shall be considered to have been paid to you immediately after your last employment date and then reinvested by you to the Plan for investment along with the remainder of your vested benefits. You understand and agree that the intention is that the relevant portion of this vested benefits can be applied under Section 311 or 31Y of the Employment Ordinance to offset the amount of the Statutory Payment to which you are entitled as if there had been no request for deferral of your benefits from the Plan.</p> <p>儘管此表格有任何其他條文規定，在閣下根據《僱傭條例》可享有任何長期服務金或遣散費（「法定付款」）之範圍內，閣下確認並同意由僱主供款衍生之歸屬權益中相當於該法定付款之一部分，將視作已在閣下之最後在職日之後，立即支付予閣下，然後閣下連同其餘之歸屬權益餘額，再投資於本計劃中。閣下明白並同意此乃按《僱傭條例》第311或31Y條例，以歸屬權益之有關部分，抵銷閣下享有之法定付款金額，就如閣下並沒有申請延遲提取閣下於本計劃之權益一樣。</p>
<p>3. During the deferred period, your unit holdings under the Plan will continue to be invested according to your instructions until Bank Consortium Trust Company Limited ("BCTC") receives a valid redemption instruction to withdraw your unit holdings. You can change the investment allocation of the investment units during the deferred period.</p> <p>在延遲提取權益期間，閣下之基金單位將繼續按閣下之指令投資，直至銀聯信託有限公司（「銀聯信託」）收到有效之基金單位贖回指令。閣下亦可於延遲提取權益期內更改您的基金投資組合。</p>
<p>4. Subject to clause 5 below, if you fail to redeem your unit holdings by the end of the deferred period, your investments will be redeemed by default and the proceeds less the administration fees for the deferred period, if applicable, will be paid to you by cheque to your correspondence address recorded in the Plan.</p> <p>在不抵觸下文第5條之規定下，如閣下在延遲提取權益期結束時還未贖回基金單位，銀聯信託將自行贖回閣下的投資，並扣除延遲提取權益期之行政費用後，將餘額以支票退回閣下於本計劃所登記之通訊地址。</p>
<p>5. In the unfortunate event of your death or bankruptcy or the Plan being terminated or wound-up before you elect to redeem or are deemed to have elected to redeem your unit holdings in accordance with clause 4 above, all of your unit holdings will be immediately redeemed and the redemption proceeds less the administration fees for the deferred period, if applicable, will be paid in accordance with the Plan rules.</p> <p>假如閣下根據上文第4條選擇贖回或被當作已選擇贖回基金單位前不幸身故、破產或本計劃終止或結束，銀聯信託將立即贖回閣下之所有基金單位，在扣除延遲贖回期之行政費用後，餘額將按照本計劃之規則支付。</p>
<p>6. BCTC reserves the right to make any changes to the Terms and Conditions of the Deferred Withdrawal of Benefits at any time. Such changes will be notified to you by BCTC.</p> <p>銀聯信託保留隨時修改延遲提取權益條款之權利。屆時銀聯信託將通知閣下有關於修訂。</p>
<p>7. Please complete and return this Form to the employer at least 7 working days before your last employment date.</p> <p>請閣下於離職前至少7個工作天將填妥之表格交回僱主。</p>
<p>8. Should you have any question, please call the Plan Hotline at 2298 9389.</p> <p>如閣下有任何疑問，請致電本計劃熱線 2298 9389 查詢。</p>

* 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 Plan / Participating Plan (concerning application records and operational records and / or their dealing / transaction details records) will only be accessed and handled by properly authorised staff of BCTC (the trustee of the Plan / Participating Plan), BCT Financial Limited ("BCTF", the sponsor of the Plan) 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 Occupational Retirement Schemes Ordinance and Mandatory Provident Fund Schemes (Exemption) Regulation; (ii) providing 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 provident fund services; (iii) improving the provision of provident fund services by BCTC to customers generally (including the facilitation of the provision of services to enable the customers of BCTC generally to access the 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.

由本計劃 / 參與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 (本計劃 / 參與計劃之受託人)、銀聯金融有限公司 (「銀聯金融」, 本計劃之保薦人) 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) 行使或執行職業退休計劃條例及強制性公積金計劃 (豁免) 規例下所授予或施加之職能或根據條例及規例的目的而行使或執行職能; (二) 提供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, 及直銷公積金服務; (三) 改善銀聯信託提供予客戶一般之公積金服務 (包括協助提供服務以令銀聯信託之客戶可於互聯網或其他途徑處理公積金 (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 IV. Authorisation and Declaration 授權及聲明

I confirm that I have read and understood the Terms and Conditions of this form in relation to the Plan. I agree to be bound by them and any changes to such Terms and Conditions which may be notified to me by BCTC from time to time. I understand that my entitlement to any Long Service Payment / Severance Payment, if any, could be offset against the deferred amount of my vested benefits under the Plan. I also understand that the unit price of the fund(s) can go up as well as down and neither the employer nor BCTC is liable in any way for the deferred withdrawal of benefits and the corresponding investment returns.

本人已細閱及明白有關本計劃之條款。本人同意受此條款及銀聯信託不時通知本人之有關條款之任何修訂約束。本人清楚本人於本計劃的歸屬權益之延遲提取權益金額, 可抵銷本人享有之任何長期服務金 / 遣散費 (如適用者), 同時亦清楚明白基金價格可升亦可跌, 並明白僱主及銀聯信託將不會為本人之延遲提取權益及其相關的投資回報負上任何責任。



Signature of Member 成員簽署

Date 日期 (D / M / Y 日 / 月 / 年)

(Must be identical to the signature under BCT record 必須與銀聯信託之簽署記錄相符)

Part V. Confirmation 確認 (To be Completed by The Employer 由僱主填寫)

Your application for Deferred Withdrawal of Benefits under the Plan is confirmed.

閣下於本計劃之延遲提取權益申請已經確認。



Authorised Signature(s) with Company Stamp (if applicable)

Date (D / M / Y) 日期 (日 / 月 / 年)

有效簽署及公司印章 (如適用)

Internal Use Only 內部專用

Date Received:

Input By:

Verified By:

Remarks: