



銀聯信託超卓匯集退休計劃

Member Enrolment Form

成員參加表格

Note 注意

- 1. Please read the Explanatory Memorandum (and any addendum thereto) of the BCT Premier Pooled ORSO Retirement Plan ("the Plan") carefully before completing this Form. 填寫此申請書前，請先細閱銀聯信託超卓匯集退休計劃(「本計劃」)解釋說明書及任何其附錄的條款。
- 2. Please mark "✓" in the appropriate box. 請於適用的方格內填上"✓"號。
- 3. 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。

Part I. Employer Details (Mandatory Field) 僱主資料 (必填部份)	
Name of Participating Plan 參與計劃名稱	Participating Plan No. 參與計劃編號
Name of Company 公司名稱 English 英文 _____ Chinese 中文 _____	Membership No. (Internal Use Only) 成員編號 (內部專用)

Part II. Member Details (Mandatory Field) 成員資料 (必填部份)				
Name of Member 成員姓名 (Must be identical to the one shown on your Hong Kong ID Card / Passport 須與您的香港身份證 / 護照上之姓名相同)				
<input type="checkbox"/> Mr. 先生 <input type="checkbox"/> Mrs. 太太 Surname 姓 (English 英文) _____	First Name 名 (English 英文) _____			
<input type="checkbox"/> Ms. 女士 <input type="checkbox"/> Prof. 教授 Chinese Name 中文姓名 _____				
<input type="checkbox"/> Dr. 醫生 / 博士				
(Copy of HKID card / passport may be requested afterwards, where appropriate. 如有需要，您或會被要求提供香港身份證 / 護照副本。)				
<input type="checkbox"/> HKID Card No. 香港身份證號碼	Sex 性別 _____			
<input type="checkbox"/> Passport No.** 護照號碼** _____				
Date of Birth (D / M / Y) 出生日期 (日 / 月 / 年) _____	Staff No. / Department Code 職員號碼 / 部門編號 (if any 如有) _____			
Date of Employment (D / M / Y) 受僱日期 (日 / 月 / 年) _____	Date of Joining Plan▲ (D / M / Y) 參與計劃日期▲ (日 / 月 / 年) _____			
Residential Address 住址 (P.O. Box address will not be accepted. All correspondence will be sent to the following address. 郵政信箱恕不接受。所有通訊將寄往以下地址。)				
Flat / Room 室 _____	Floor 樓 _____	Block 座 _____		
Building / Estate Name 大廈 / 屋苑名稱 _____				
Street / Road 街道 _____		District 地區 _____		
<input type="checkbox"/> Hong Kong 香港 <input type="checkbox"/> Kowloon 九龍 <input type="checkbox"/> New Territories 新界 <input type="checkbox"/> Overseas 海外 (Please specify 請說明) _____				
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			_____	
China / Overseas 中國 / 海外	_____	_____	_____	_____
E-mail Address 電郵地址	_____			

** Passport No. should be given only when you do not possess HKID card. 只在沒持有香港身份證的情況下才填寫護照號碼。
▲ If the Date of Joining Plan is left blank, it will be considered the same as the Date of Employment. 如沒有填寫參與計劃日期，該日期將視作與受僱日期相同。

Part III. SMS Services 短訊服務**1. SMS Notification Service 短訊通知服務**

Please select language & register a local mobile phone no. (Remark 1) in Part II space provided overleaf to receive SMS notification in relation to general account information, (if any). 請選擇短訊語言及在背頁第 II 部份的空格登記本地之手提電話號碼 (註 1)，以收取有關帳戶一般資訊(如有)。

English 英文 Traditional Chinese 繁體中文

2. Account Balance SMS Service (Remark 2) 計劃戶口結餘短訊提示服務 (註 2)

To keep you updated of your account status, you may choose to receive an SMS message from us via your local mobile phone no. provided in the Part II overleaf advising your account balance (Remark 3) every month. 選擇短訊提示服務，透過背頁第 II 部份所提供之手提電話號碼每月為您提供戶口結餘 (註 3)，讓您掌握戶口最新狀況。

Apply 申請 Not apply 不申請

Remarks 備註

- Hong Kong mobile phone users and 5, 6, or 9 word at the beginning of the mobile phone no. only. 此服務只限香港地區之手提電話用戶並只適用於 5、6 或 9 字開頭的手提電話號碼。
- The figures will be calculated by using the fund price as at the 15th day of each month and, if the 15th day is not a business day, the following business day. Information on account balance is for reference only. 數額將根據每月第 15 日當天之基金價格計算。假如第 15 日並非工作天，則以第 15 日之後的下一個工作天之基金價格計算。戶口結餘資料僅供參考。

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 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 Bank Consortium Trust Company Limited ("BCTC" the trustee of the 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 and / or automated teller machine networks such as JETCO); (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.

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.

由本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」, 本計劃之受託人)、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及 / 或自動櫃員機網絡例如銀通處理公積金 (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。

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 V. Authorisation, Declaration and Consent 授權、聲明及同意

By signing this document:

- (1) I apply for membership of the Participating Plan and agree to be bound by the terms and conditions of the Participating Plan. I acknowledge and agree that the provision of benefits to which I am entitled under the Participating Plan shall entail regular contributions to the Participating Plan by deduction from my salary.
- (2) I undertake that if there is any change in the information so provided, I shall notify BCTC as soon as reasonably practicable.
- (3) I confirm that I have received, read and understood the contents contained in the latest version of the Explanatory Memorandum (and any addendum thereto) of the Plan. I accept and agree to be bound by the terms of such principal brochure (and addendum thereto, if any), the trust deed constituting the Plan (including any deed of amendment), the rules thereof and any other notification sent to me from time to time pursuant to the terms of the relevant trust deed. I understand that such terms constitute the "terms of the Participating Plan" referred to above.
- (4) I understand and agree to the terms of the Personal Information Collection Statement as set out in this form.
- (5) I declare that to the best of my knowledge and belief, the information given in this form and / or its attachment(s), if any, is correct and complete.
- (6) I expressly consent to the use of my personal data (name, telephone no., fax no., e-mail address, address and account records) for the purpose of direct marketing of pension and / or investment fund related services (such as provident fund services and financial advice / planning services) and ancillary products by BCTC and BCTF (or their employees or agents); but I understand that BCTC and BCTF cannot make such use of my personal data without my consent and will cease upon my written or verbal request. I further understand that if I do not wish to consent to my personal data being used for the said direct marketing purpose, I should indicate that no consent is given, by ticking this box.

經簽署本文件:

- (1) 本人現申請成為參與計劃之成員，並同意遵守有關參與計劃之條款及條件。本人確認並同意須從本人收入內扣除有關參與計劃中列明之定期供款，本人才得以依照有關參與計劃之規定享有權益。
- (2) 本人承諾假使所提供之資料有任何更改，本人將於改動後儘快通知銀聯信託。
- (3) 本人確認本人已收取、細閱及明白最新版本之本計劃的解釋說明書及任何其附錄的條款。本人接受及同意受此解釋說明書及其附錄的條款、成立該計劃的信託契約(包括其後之修訂契約，如有)、信託契約內的規則及日後根據有關信託契約之條款向本人不時發出有關之通知所約束。本人明白此條款屬於以上「有關參與計劃之條款」的一部份。
- (4) 本人明白及同意於此表格之收集個人資料聲明條款。
- (5) 本人聲明，盡本人所知及所信，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。
- (6) 本人即明確表示同意銀聯信託及銀聯金融(及其僱員或代理)使用本人的個人資料(姓名、電話號碼、傳真號碼、電郵地址、地址及戶口記錄)作直銷退休及 / 或投資基金的相關服務(例如退休金服務及財務建議 / 財務計劃服務)及有關產品，但本人明白倘本人不同意銀聯信託及銀聯金融不能如此使用本人的個人資料及倘接獲本人之書面或口頭要求，該使用將停止。本人亦明白如本人不欲將本人的個人資料用作上述直銷用途，本人應在此方格內加上“✓”號，以表示不同意。

Signature of Member 成員簽署

Full Name 全名

Date (D / M / Y) 日期(日 / 月 / 年)

To be Completed by The Employer 由僱主填寫

Payroll Cycle 出糧周期	<input type="checkbox"/> Yearly 每年 (_____ month 月)	<input type="checkbox"/> Monthly 每月	<input type="checkbox"/> Semi-monthly 每半月	<input type="checkbox"/> Weekly 每星期	<input type="checkbox"/> Others 其他 _____	Member Category (if any) 成員類別 (如有)
-----------------------	--	--	--	--	---	---------------------------------------

Asset Transfer In / Recognised Past Service 資產轉入 / 認可過往服務年資

- Asset Transfer In (Please complete [FORM: ORSO-ST (EE)])
資產轉入 (請填寫 [FORM: ORSO-ST (EE)])
- Recognised Service Effective Date: _____
認可服務生效日期: D 日 - M 月 - Y 年



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)

Internal Use Only 內部專用

Date Received:	Input By:	Verified By:	Remarks:
Broker Code:	Agent Code:	Campaign Code:	BD Code: