



NOTES TO TRANSFER OF MPF ACCURED BENEFITS (BENEFITS) BY SCHEME MEMBER

計劃成員轉移強積金累算權益須知 (for self-employed person, personal account holder or employee ceasing employment) (適用於自僱人士、個人帳戶持有人或終止受僱的僱員)

Sections 145, 146, 147, 148 and 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)
《強制性公積金計劃(一般)規例》(第485章)第145、146、147、148及149條

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**：

(1) **Definition of terms 用詞定義：**

- (a) “Contribution account” - an account in an MPF scheme which is mainly used to receive MPF contributions (both employer and employee portions) made by an employer for an employee and on behalf of the employee or by a self-employed person.
「供款帳戶」一指強積金計劃下主要用以接收僱主為僱員所作出以及代表僱員所作出的強積金供款(包括僱主及僱員部分)或自僱人士所作出的強積金供款的帳戶。
- (b) “Personal account” - an account in an MPF scheme which is mainly used to receive the benefits transferred from another contribution or personal account(s).
「個人帳戶」一指強積金計劃下主要用以接收由另一供款或個人帳戶轉入的權益的帳戶。
- (c) “Original trustee” (also known as “transferor trustee” in the Mandatory Provident Fund Schemes (General) Regulation (“the Regulation”)) - the trustee of an MPF scheme from which your benefits are to be transferred.
「原受託人」(在《強制性公積金計劃(一般)規例》(《規例》)中亦稱「轉移受託人」)一指轉出你的權益的強積金計劃的受託人。
- (d) “New trustee” (also known as “transferee trustee” in the Regulation) - the trustee of an MPF scheme to which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same MPF scheme or to another MPF scheme under the same trustee, the new trustee on Form MPF(S)-P(M) will be the same as the original trustee.
「新受託人」(在《規例》中亦稱「承轉受託人」)一指轉入你的權益的強積金計劃的受託人。如你選擇把權益轉移至同一強積金計劃的另一個帳戶或轉移至同一受託人的另一個強積金計劃，在第MPF(S)-P(M)號表格所指的新受託人將與原受託人相同。
- (e) “Original scheme” - the MPF scheme from which your benefits are to be transferred.
「原計劃」一指轉出你的權益的強積金計劃。
- (f) “New scheme” - the MPF scheme to which your benefits are to be transferred. If you elect to transfer your benefits to another account within the same MPF scheme, the new scheme on Form MPF(S)-P(M) will be the same as the original scheme.
「新計劃」一指轉入你的權益的強積金計劃。如你選擇把權益轉移至同一強積金計劃的另一個帳戶，在第MPF(S)-P(M)號表格所指的新計劃將與原計劃相同。

- (2) If you are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that 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 original scheme or consult your original trustee for details.
如你現時投資於強積金保證基金，從該保證基金轉出權益，可能會導致你不符合部分或所有保證條件，以致影響你享有保證的資格。詳情請查閱原計劃的要約文件，或向原受託人查詢。

- (3) *If you wish to transfer your benefits from one MPF scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy (“DIS”) if you either (a) do not give or have not given any investment instructions for the account to your new trustee or (b) have given investment instructions for the account to invest benefits according to the DIS. Please approach your new trustee to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in the new scheme, please also approach the new trustee.*
如欲把權益從一個強積金計劃轉移至另一個強積金計劃，請留意轉入帳戶的權益將會如何投資。一般而言，如你(a)沒有或尚未就有關帳戶向你的新受託人給予任何投資指示；或(b)已就有關帳戶給予投資指示，要求把權益按照預設投資策略投資，則轉入該帳戶的權益將按照預設投資策略投資。如有需要，請向新受託人查詢詳情。如欲就新計劃的帳戶更改或給予投資指示，亦請聯絡新受託人。
- (4) *If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the 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 investment in the DIS and your transfer request take place at around the same time, the trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant trustee(s) if you wish to know the details of how the trustee(s) will handle these transactions.*
如你已年滿或快將年滿50歲，而現時你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你的投資風險的時間，與接獲你的轉移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《強制性公積金計劃條例》規定的情況下，訂定處理降低風險及轉移權益的次序。如欲瞭解核准受託人如何處理該等交易，請向相關受託人查詢詳情。
- (5) *Please ensure that you have a personal account or a contribution account in the new scheme. Otherwise, you have to enrol in that scheme before you submit Form MPF(S)-P(M) to the new trustee.*
請確保你在新計劃已開立個人帳戶或供款帳戶。否則，你須先行登記參加該計劃，然後才向新受託人提交第MPF(S)-P(M)號表格。
- (6) *If you wish to transfer-out the benefits from more than one accounts, you should submit a separate Form MPF(S)-P(M) for each of those accounts.*
如欲從多於一個帳戶轉出權益，請就每個帳戶分別提交一份第MPF(S)-P(M)號表格。
- (7) *If you wish to transfer-out the benefits from your contribution account during employment, you should complete Form MPF(S)-P(P).*
如欲在現職期間從你的供款帳戶轉出權益，請填寫第MPF(S)-P(P)號表格。
- (8) *For each account, a scheme member should transfer the entirety of his benefits therein in a lump sum except the part of the benefits derived from voluntary contributions which the scheme member may elect to withdraw in accordance with the governing rules of the original scheme.*
就每一個帳戶，除了由自願性供款所產生的權益或可根據原計劃管限規則選擇提取外，計劃成員應把帳戶內的所有權益整筆轉移。
- (9) *In order to prevent a third party from filling in incorrect information, please **DO NOT sign on a blank form.** After the completed Form MPF(S)-P(M) has been received by the new trustee, the administration procedures taken by the trustees may not be reversible.*
為免被第三者填上不正確的資料，請勿在空白的表格上簽署。在新受託人收到已填妥的第MPF(S)-P(M)號表格後，之前由受託人採取的行政步驟未必能夠撤銷。
- (10) *If any information provided on Form MPF(S)-P(M) (including the signature) is incorrect or incomplete, the trustees may not be able to process your benefit transfer request.*
若你在第MPF(S)-P(M)號表格上所提供的任何資料(包括簽署)不正確或不完整，受託人可能無法處理你的權益轉移要求。

- (11) Please refer to the publication of the Mandatory Provident Fund Schemes Authority (“MPFA”) available from the MPFA website (www.mpfa.org.hk) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment.
有關選擇計劃時各項考慮因素及強積金投資的潛在風險，請參閱強制性公積金計劃管理局（「積金局」）網站（www.mpfa.org.hk）的相關宣傳刊物。
- (12) Information about the new scheme is set out in the offering document of that scheme. This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the relevant trustee for enquiries about account details and information on specific MPF schemes or funds..
新計劃的要約文件載有該計劃的資料，這些資料將有助你決定是否把權益轉移至該計劃。如欲查詢帳戶詳情及個別強積金計劃或基金的資料，請聯絡相關受託人。
- (13) If you wish to make enquiries or seek assistance in relation to your election to transfer benefit, please contact your original trustee or new trustee. For general enquiries regarding benefit transfer, you may contact the MPFA via e-mail: mpfa@mpfa.org.hk or hotline: 2918 0102.
如欲就你的權益轉移申請作出查詢或尋求協助，請聯絡你的原受託人或新受託人。有關權益轉移的一般查詢，可聯絡積金局（電郵地址：mpfa@mpfa.org.hk 或熱線電話：2918 0102）。

~END~

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[This page is blank. Please complete Form MPF(S)-P(M) at page i to page iv and submit it to the new trustee after completion.]

[此乃空白頁。請填妥載於第 i 頁至第 iv 頁的第 MPF(S)-P(M)號表格，並提交該表格予新受託人。]



SCHEME MEMBER'S REQUEST FOR FUND TRANSFER FORM 計劃成員資金轉移申請表

Form 表格:
MPF(S) - P(M)

(for self-employed person, personal account holder or employee ceasing employment)
(適用於自僱人士、個人帳戶持有人或終止受僱的僱員)

Sections 145, 146, 147, 148 and 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap 485A)
《強制性公積金計劃(一般)規例》(第485章)第145、146、147、148及149條

- (a) Please use **BLOCK LETTERS** to complete this Form.
- (b) *means delete whichever is inappropriate. Please insert "N.A." if not applicable. *請刪去不適用者。請在不適用處填上「不適用」。
- (c) The personal data to be supplied in support of this election of transfer are to be used for processing your election of transfer. The personal data you supply may, for such purpose, be transferred to the trustee(s) concerned, the relevant service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority ("MPFA"). 你就此項轉移申請提供的個人資料，將用作處理你的轉移申請。你提供的個人資料可能會為該目的而轉交相關核准受託人、相關服務提供者，以及政府或規管機構，包括強制性公積金計劃管理局(「積金局」)。

SECTION I - SCHEME MEMBER'S DETAILS 第 I 部 — 計劃成員資料

- (1) Name 姓名 : (a) Surname 姓氏 : _____
(as shown on your Hong Kong Identity (HKID) Card^{Note 1}) (與你的香港身份證上的姓名相同^{註 1}) (b) Other Name 名字 : _____
- (2) Identification 身份證明 : (a) HKID Card number 香港身份證號碼 : _____
(b) Passport number 護照號碼 : _____
(ONLY for scheme member without HKID Card) (本欄僅供沒有香港身份證的計劃成員填寫)
- (3) Contact details 聯絡資料 : (a) Daytime contact number 日間聯絡電話號碼 : _____
(b) Mobile phone number 手提電話號碼 : _____
(c) Email address (if any) 電郵地址 (如有) : _____
- (4) Correspondence address 通訊地址 : _____

SECTION II - TRANSFER INFORMATION 第 II 部 — 轉移資料

(5) MPF account information in the original scheme 原計劃的強積金帳戶資料：

Name of original trustee^{Note 2}

原受託人名稱^{註 2}：

Name of original scheme^{Note 2}

原計劃名稱^{註 2}：

Type of MPF account (*please select ONE of the following accounts and ✓ as appropriate*)

強積金帳戶類別 (請選擇以下其中一個帳戶，並於適當方格內填上✓號)：

Personal account OR Contribution account
個人帳戶 或 供款帳戶

Scheme member's account number^{Note 2}

計劃成員帳戶號碼^{註 2}：

(6) Details of former employment (*applicable for employee who wishes to transfer-out the benefits from a contribution account after cessation of employment*):

以往受僱詳情 (適用於僱員在終止受僱後欲把供款帳戶內的累算權益轉出。)

Name of former employer 前任僱主名稱：_____

Employer's identification number^{Note 3} 僱主識別號碼^{註 3}：_____

(7) Details of self-employed status (*applicable for self-employed person only*):

自僱人士身份詳情 (只適用於自僱人士)

Please indicate your reason of transfer and ✓ as appropriate.

請於適當方格內填上✓號，表明申請轉移的原因：

Cessation of self-employment, with effect from:
終止自僱，生效日期是：

日 (DD)	月 (MM)	年 (YYYY)

I will remain in self-employment and my benefits will be transferred to another MPF scheme stated in section III(8). Contributions to the original scheme should be paid up to:
本人將會維持自僱，並把本人的權益轉移至第 III(8)部所述的另一個強積金計劃。本人向原計劃供款的最後日期是：

日 (DD)	月 (MM)	年 (YYYY)

SECTION III - TRANSFER OPTIONS 第 III 部 — 轉移選擇

- (8) MPF account information in the new scheme 新計劃的強積金帳戶資料：
I elect to transfer the benefits derived from the mandatory contributions in my account stated in section II(5) to the following account (*Please select option (a),(b) OR (c) and ✓ as appropriate*):
本人選擇把在第 II(5)部所述帳戶內由強制性供款所產生的權益轉移至以下帳戶
(請選擇(a)，(b)或(c)，並於適當方格內填上✓號)：

(a) **To my contribution account with my new employer**

轉移至本人新僱主就本人開立的供款帳戶

Name of new trustee^{Note 4}

新受託人名稱^{註 4}：

China Life Trustees Limited

中國人壽信託有限公司

Name of new scheme^{Note 4}

新計劃名稱^{註 4}：

China Life MPF Master Trust Scheme

中國人壽強積金集成信託計劃

Scheme member's account number^{Note 4}

計劃成員帳戶號碼^{註 4}：

Name of new employer

新僱主名稱：

Employer's identification number^{Note 3}

僱主識別號碼^{註 3}：

(b) **To my designated account in the new scheme**

轉移至本人新計劃內的指定帳戶

Name of new trustee^{Note 4}

新受託人名稱^{註 4}：

China Life Trustees Limited

中國人壽信託有限公司

Name of new scheme^{Note 4}

新計劃名稱^{註 4}：

China Life MPF Master Trust Scheme

中國人壽強積金集成信託計劃

Scheme member's account number^{Note 4}

計劃成員帳戶號碼^{註 4}：

(c) **Retained in the original scheme as personal account** (where applicable)

以個人帳戶形式保留在原計劃 (如適用)

- (9) Arrangement of my voluntary contributions^{Note 5} (if any) in my account stated in section II(5)
有關本人在第 II(5)部所述帳戶內的自願性供款^{註 5} (如有) 的安排。

Please select option (a) OR (b) and ✓ as appropriate.
請選擇(a)或(b)，並於適當方格內填上✓號：

(Remarks: If you do not select any options but there are benefits derived from voluntary contributions, those benefits will be handled in the same way as those stated in section III(8). If there are no such benefits in your account and you have made an election in section III(9), the selected option will not be processed.) (備註：如你沒有作出任何選擇，而帳戶內有由自願性供款產生的權益，則該等權益將以處理第 III(8)部所述權益的同樣方式處理。如你已在第 III(9)部作出選擇，而帳戶內並沒有該等權益，則有關選擇將不會獲處理。)

- (a) Transferred together with the benefits derived from the mandatory contributions as in section III(8). 與在第 III(8)部所述由強制性供款所產生的權益一併轉移。
- (b) Withdrawn in accordance with the governing rules of the original scheme 按照原計劃的管限規則提取權益。

Method of payment (please ✓ as appropriate) 付款方式

(請在適當方格內填上✓號)：

- (i) By cheque 支票付款
- (ii) By depositing directly in a bank account under the name of scheme member only (a bank account under the name of a third party is not applicable). (This option is applicable only to trustees who provide such services and there may be bank charges involved. Please check with the original trustee for details.) 直接存入只以計劃成員名義開立的銀行帳戶（不適用於以第三者名義開立的銀行帳戶）。（這項選擇只適用於有提供此項服務的受託人，並銀行可能會因此而收取費用。詳情請向原受託人查詢。）

Name of bank account holder

銀行帳戶持有人姓名： _____

Name of bank:

銀行名稱： _____

Bank account number:

銀行帳戶號碼： _____

SECTION IV – TERMINATION OF MPF ACCOUNT WITH NO RESIDUAL BALANCE (IF APPLICABLE)

第 IV 部 – 終止沒有剩餘款項的強積金帳戶（如適用）

- (10) I hereby give the original trustee an instruction to terminate my relevant MPF member account as referred to in section II(5) upon transfer of the full benefits to the new trustee and there is no residual balance in the said account. 本人謹此指示原受託人在把本人於第 II(5)部所述的強積金成員帳戶內的所有權益轉移至新受託人後，以及在該帳戶內並無剩餘款項的情況下，終止該強積金成員帳戶。

SECTION V – AUTHORIZATION AND DECLARATION 第 V 部 – 授權及聲明

- (11) I hereby give consent to the new trustee and the MPFA to disclose information supplied by me in support of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer. 本人同意，新受託人及積金局可為處理本人的轉移申請，向相關受託人及相關服務提供者披露本人就此項轉移申請提供的資料，或使該等機構／人士能夠取覽或披露該等資料。
- (12) I declare that 本人聲明：
- (a) I have read and understood the Notes to Transfer of Benefits by Scheme Member and the Explanatory Notes; and 本人已閱讀及明白《計劃成員轉移權益須知》及註釋的內容；及
- (b) I acknowledge and confirm that I have read and understood and agree with the terms of the Personal Information Collection Statement (“PICS”) attached herein; and 本人知悉及確認本人已閱讀並明白及同意收集個人資料聲明條款；及
- (c) to the best of my knowledge and belief, the information given in this Form is correct and complete. 盡本人所知所信，本表格所提供的資料均屬正確無訛且無缺漏。

Signature of the scheme member^{Note 6} 計劃成員簽署^{註 6}

Date 日期

Agent Name and Code 代理人名稱及編號:	
MPF Intermediaries 中介人編號:	

Explanatory Notes 填報須知

- (1) If you do **NOT** possess a HKID Card, please fill in your name as shown on your passport. 如你沒有香港身份證，請填上你在護照上的姓名。
- (2) The transfer request may not be processed if the name of the original trustee, the name of the original scheme, your scheme member's account number in the original scheme, type of MPF account, the name of your former employer or the employer's identification number is not provided or is incorrect. This information can be found: 如你沒有提供原受託人名稱、原計劃名稱、原計劃成員帳戶號碼、強積金帳戶類別、前任僱主名稱或僱主識別號碼，或所提供的資料有誤，則此項轉移要求或不獲處理。你可透過以下途徑獲取有關資料：
- (a) in your membership certificate, notice of acceptance, or notice of participation; or 查閱成員證明書、接納通知或參與通知；或
 - (b) in your annual benefit statement, or other statements provided by the trustee; or 查閱周年權益報表或受託人提供的其他報表；或
 - (c) through the member enquiry facilities available from the trustees 受託人提供的成員查詢服務。

If you are in doubt, please contact your original trustee or your employer. 如有疑問，請聯絡你的原受託人或僱主。

- (3) The employer's identification number is the number assigned by the trustee to the employer concerned. Trustees may use different names for this number (e.g. account number, company code, contract number, employer account number, employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). The number can be found in the statements issued by the trustees or through the member enquiry facilities available from the trustees. If you are in doubt, please contact your trustee or your employer. 僱主識別號碼即受託人為有關僱主編配的號碼。受託人或會使用不同名稱來設定此號碼（例如帳戶編號、僱主編號、合約編號、強積金客戶編號、參與計劃編號、計劃編號、附屬計劃編號）。你可查閱受託人發出的報表或透過受託人提供的成員查詢服務獲取該號碼。如有疑問，請聯絡你的受託人或僱主。
- (4) The transfer request may not be processed if the name of the new trustee, the name of the new scheme or your scheme member's account number in the new scheme is not provided or is incorrect. The information can be found: 如你沒有提供新受託人名稱、新計劃名稱或新計劃成員帳戶號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可透過以下途徑獲取有關資料：
- (a) in your membership certificate, notice of acceptance, or notice of participation; or 查閱成員證明書、接納通知或參與通知；或
 - (b) in your annual benefit statement, or other statements provided by the trustee; or 查閱周年權益報表或受託人提供的其他報表；或
 - (c) through the member enquiry facilities available from the trustees 受託人提供的成員查詢服務。

You may, however, leave the scheme member's account number blank if you have recently enrolled in the scheme and have not been notified of the new account number. If you are in doubt, please contact your new trustee. 不過，如你最近才參加計劃，並未獲悉新的成員帳戶號碼，則可留空此項。如有疑問，請聯絡你的新受託人。

- (5) A scheme member can check whether his existing MPF account contains any benefits derived from voluntary contributions from his annual benefit statement issued by the original trustee to the scheme member. The scheme member can also check this information through the member enquiry facilities available from the trustees. If you are in doubt, please contact your original trustee. 計劃成員可在原受託人向計劃成員發出的周年權益報表上，獲知其現有強積金帳戶內是否有由自願性供款產生的權益。計劃成員亦可透過受託人提供的成員查詢服務查核這項資料。如有疑問，請聯絡你的原受託人。
- (6) The signature must be the same as your specimen signature previously given to your original trustee. Please note that the transfer may not be processed if the signature provided in this Form does not match your specimen signature previously given to your original trustee. If you are in doubt, please contact your original trustee. 你的簽署必須與你之前給予原受託人的簽署式樣相同。請注意，若本表格上的簽署與你之前給予原受託人的簽署式樣不符，有關轉移或不獲處理。如有疑問，請聯絡你的原受託人。

~END~

~完~

Personal Information Collection Statement 收集個人資料聲明

China Life Trustees Limited (the “Company”) recognises its responsibilities in relation to the collection, holding, processing or use of personal data under the Personal Data (Privacy) Ordinance. Personal data will be collected only for lawful and relevant purposes and all practicable steps will be taken to ensure that personal data held by the Company is accurate. The Company will take all practicable steps to ensure security of the personal data and to avoid unauthorized or accidental access, erasure or other use.

The provision of your personal data is voluntary. Please note that if you do not provide us with the required personal information, the Company may not be able to provide your requested information, products or services.

Purpose: From time to time it is necessary for us to use your personal data for the following purposes:

1. offering and providing to you the China Life MPF Master Trust Scheme (“MPF Scheme”) or related products/services of the Company and other companies of the China Life Group (“our affiliates”), and administering, maintaining, managing and operating such MPF Scheme or related products/services;
2. processing and evaluating any applications or requests made by you or in respect of your benefits in the MPF Scheme or related products/services offered by the Company and our affiliates;
3. providing subsequent services to you on the MPF Scheme or related products/services of the Company and our affiliates and the administration thereof e.g. enrollment and termination, variations, calculation of contributions and benefits and the processing of redemption/withdrawal/switching/transfer requests;
4. any purposes in connection with any claims or benefits payment or transfer requests made by or against or otherwise involving you or your benefits in respect of the MPF Scheme or related products/services provided by the Company and/or our affiliates;
5. evaluating your financial needs with respect to the MPF Scheme and related products/services;
6. designing new or enhancing existing MPF scheme or related products/services of the Company and/or our affiliates;
7. conducting market or actuarial research for statistical or similar purposes undertaken by the Company and/or our affiliates, the MPF industry or our respective regulators;
8. matching any data held which relates to you from time to time for any of the purposes listed herein;
9. meeting requirements imposed by any applicable, present, existing or future law, rules, regulations, codes of practice or guidelines (including sending of information) or assisting with law enforcement purposes, investigations by police or other government or regulatory authorities in Hong Kong or elsewhere;
10. conducting identity check and/or debt collection for the MPF Scheme and related business;
11. carrying out other services in connection with the operation of the Company’s MPF Scheme or related business;
12. sending out administrative communications about any account you may have with the Company, MPF Scheme communications or about future changes to this Personal Information Collection Statement;
13. performing relevant due diligence procedures in accordance with the Common Reporting Standard (or Automatic Exchange of Financial Account Information) as set out in the Inland Revenue Ordinance (Cap. 112); and
14. other purposes directly relating to any of the above.

Transfer of personal data: Personal data will be kept confidential but, subject to the provisions of any applicable law, may be shared with the following for the purpose of exercise and performance of the Company’s functions conferred or imposed by or under the MPF laws:

1. any of our affiliates;
2. any person in connection with any claims made by or against or otherwise involving you or your benefits in respect of the MPF Scheme or related products/services provided by the Company and/or our affiliates;
3. any agent, contractor or third party who help provide services in connection with the MPF Scheme or related product/services provided by the Company and/or our affiliates, including any service providers engaged by the Company, MPF intermediary, fund management company or financial institution;
4. any agent, contractor or third party who provides administrative, technology, data processing, telecommunications, computer, payment, debt collection, securities clearing, call centre services or other services to the Company and/or our affiliates in connection with the MPF Scheme or related business;
5. any actual or proposed assignee, transferee, participant or sub-participant of our rights or business; and
6. any government department or other appropriate governmental or regulatory authority (which may be further transferred to governmental or regulatory authority of certain other jurisdiction(s)) to whom the Company and/or our affiliates are requested or required by any applicable, present, existing or future law, rules, regulations, codes of practice or guidelines to make disclosures.

Your personal data may be provided to any of the above parties who may be located in Hong Kong or outside of Hong Kong, and in this regard you consent to the transfer of your data outside of Hong Kong.

Use of Personal Data for Direct Marketing Purposes: The Company intends to:

1. use your name, contact details, products and services portfolio information, transaction pattern and behaviour, financial background and demographic data held by the Company from time to time for direct marketing of the MPF Scheme or related products/services by the Company and/or our affiliates;
2. The Company requires your written consent (which includes an indication of no objection) to use your personal data for any promotional or marketing purpose.

You may withdraw your consent to the use of your personal data for direct marketing purposes at any time, and thereafter the Company shall, without charge to you, cease to use such data for direct marketing purposes. If you wish to withdraw your consent, please contact our Personal Data Protection Officer (details below).

Access and correction of personal data: Under the Personal Data (Privacy) Ordinance, you have the right to ascertain whether the Company holds your personal data, to correct any data that is inaccurate, and to ascertain the Company’s policies and practices in relation to personal data. You may also request the Company to inform you of the type of personal data held by it.

Requests for access and correction or for information regarding policies and practices and types of data held should be addressed in writing to:

The Personal Data Protection Officer
China Life Trustees Limited
17/F, CLI Building, 313 Hennessy Road,
Wan Chai, Hong Kong
Telephone: (852) 3999 5555
Fax: (852) 2893 2103

The Company has the right to charge a reasonable fee for the processing of any data request.

中國人壽信託有限公司（下稱“本公司”）明白其在《個人資料（私隱）條例》下就個人資料的收集、持有、處理或使用所負有的責任。本公司僅將為合法和相關的目的收集個人資料，並將採取一切切實可行的步驟，確保本公司所持個人資料的準確性。本公司將採取一切切實可行的步驟，確保個人資料的安全性，及避免發生未經授權或者因意外而擅自取得、刪除或另行使用個人資料的情況。

閣下的個人資料為自願提供。敬請注意，如果閣下不向本公司提供所需的個人資料，本公司可能無法提供閣下要求的資料、產品或服務。

目的：本公司不時有必要使用閣下的個人資料作下列目的：

1. 向閣下推介和提供本公司及中國人壽集團的其他公司（“本公司關聯方”）的中國人壽強積金集成信託計劃（下稱“強積金計劃”）或相關產品／服務，以及提供、維持、管理和操作該強積金計劃或相關產品／服務；
2. 處理和評估閣下就本公司及本公司關聯方的強積金計劃或相關產品／服務提出的或與閣下就該強積金計劃或相關產品／服務所享有的權益有關的任何申請或要求；
3. 就本公司及本公司關聯方的強積金計劃或相關產品／服務向閣下提供後續服務，以及執行／管理該強積金計劃或相關產品／服務，例如登記加入和終止、變更、計算供款和權益以及處理贖回／提取／轉換／轉移要求；
4. 就本公司和／或本公司關聯方提供的強積金計劃或相關產品／服務而由閣下提出的、針對閣下或閣下的權益提出的、或者其他涉及閣下或閣下的權益的任何申索或權益的支付或轉移要求相關的任何目的；
5. 就強積金計劃及相關產品／服務而評估閣下的財務需求；
6. 為本公司和／或本公司關聯方設計新的強積金計劃或相關產品／服務或改進現有的強積金計劃或相關產品／服務；
7. 為本公司和／或本公司關聯方、強積金行業或相關的監管機構的統計或類似目的進行市場或精算研究；
8. 基於本收集個人資料聲明（“本聲明”）所列的任何目的，將本公司不時持有並與閣下有關的任何資料進行核對；
9. 滿足任何適用已存在、現有或將來法律、規則、規例、實務守則或指引要求（包括發送資訊），或協助在香港或香港以外其他地方的警方或其他政府或監管機構執法及進行調查；
10. 為強積金計劃和相關業務進行身份和／或債務追收；
11. 開展與本公司的強積金計劃或相關業務經營有關的其他服務；
12. 就閣下在本公司持有的任何帳戶、強積金計劃通訊或本聲明未來的變更發出行政性通訊；
13. 根據第112章《稅務條例》中自動交換財務帳戶資料的規定，進行所需的盡職審查程序；及
14. 與上述任何目的直接有關的其他目的。

個人資料的移轉：個人資料將予以保密，但在遵守任何適用法律條文的前提下，可為本公司行使和履行強積金法律賦予或委予其職能的目的而與下列人士共享：

1. 任何本公司關聯方；
2. 就本公司和／或本公司關聯方提供的強積金計劃或相關產品／服務而由閣下提出的、針對閣下或閣下的權益提出的、或其他涉及閣下或閣下的權益的任何申索相關的任何人士；
3. 就本公司和／或本公司關聯方所提供的強積金計劃或相關產品／服務的任何代理、承包商或第三方，包括本公司聘用的任何服務提供商、強積金中介人、基金管理公司或金融機構；
4. 就強積金計劃或相關業務向本公司和／或本公司關聯方提供行政、技術、數據處理、電訊、電腦、支付、債務追收、證券交收、電話中心服務、或其他服務的任何代理、承包商或第三方；
5. 本公司權利或業務的任何實際或建議的承讓人、受讓方、參與者或次參與者；及
6. 任何適用已存在、現有或將來法律、規則、規例、實務守則或指引要求或規定本公司和／或本公司關聯方向其作出披露的任何政府部門或其他適當的政府或監管機關（被移轉的資料或會進一步轉交予其他司法管轄區的政府部門或適當的政府或監管機關）。

閣下的個人資料可能會提供給上述任何一方（該方可能位於香港境內或境外），而就此而言，閣下同意將閣下的資料移轉至香港境外。

為直接促銷目的而使用個人資料：本公司打算：

1. 使用本公司不時持有的閣下的姓名、聯絡資料、產品和服務的組合資料、交易模式和行為、財政背景和統計數據以就本公司和／或本公司關聯方提供的強積金計劃或相關產品／服務進行直接促銷；
2. 本公司需取得閣下的書面同意（包括表示不反對）方可為任何推廣或促銷目的而使用閣下的個人資料。

閣下可隨時撤回給予本公司有關使用閣下的個人資料作直接促銷用途的同意，而本公司將在不收取任何費用的情況下停止使用該等資料作直接促銷用途。閣下如欲撤回閣下給予本公司的同意，請聯絡本公司的個人資料保護主任（詳情參閱下文）。

個人資料的查閱和更正：根據《個人資料（私隱）條例》，閣下有權查明本公司是否持有閣下的個人資料，更正任何不準確的資料，以及查明本公司有關個人資料的政策及常規。閣下還可以要求本公司告知閣下本公司所持個人資料的種類。

查閱和更正的要求，或有關獲取政策、常規及所持的資料種類的資料，均應以書面形式發送至：

個人資料保護主任
中國人壽信託有限公司
香港灣仔軒尼詩道 313 號
中國人壽大廈 17 樓
電話：(852) 3999 5555
傳真：(852) 2893 2103

本公司有權就因處理任何查閱個人資料的要求收取合理費用。