



**CHINA LIFE MPF MASTER TRUST SCHEME (“the Scheme”)**  
**中國人壽強積金集成信託計劃 (“本計劃”)**

**Amendment to the “Participation Form of the Personal Account Holder (“PAH”)” / “Application of Participation Form for Smart Easy Personal Contributions (“SVC”)” / “Application of Participation Form for Tax Deductible Voluntary Contribution (“TVC”) Account”**

**更改“個人帳戶持有人參加表” / “智易個人供款參加申請表” / “可扣稅自願性供款帳戶參加申請表”**

The amended information on this form will become part of the Application of Participation Form of the Personal Account Holder / Application of Participation Form for Smart Easy Personal Contributions / Application of Participation Form for Tax Deductible Voluntary Contribution (“TVC”) Account. 本表格上所更改之資料，將成為個人帳戶持有人參加申請表 / 智易個人供款 / 可扣稅自願性供款帳戶參加申請表之其中一部份。

**Part I Details of PAH/SVC/TVC 第一部份 個人帳戶持有人/智易個人供款/可扣稅自願性供款資料**  
(\*please delete whichever is inappropriate \*請刪去不適用者)

Scheme No. 計劃編號	
Name of PAH / SVC / TVC 個人帳戶持有人/智易個人供款/可扣稅自願性供款姓名	
*HKID No/ Passport No. 身份證號碼/護照號碼	
Change Effective Date 更改生效日期	

**Part II Amendment to PAH/SVC/TVC Details 第二部份 更改個人帳戶持有人/智易個人供款/可扣稅自願性供款資料**  
(Please complete the applicable portion only. 只需填寫適用部份)

Please apply the below amendment to 請將以下更改應用於:  (1) ALL of my account(s) within the Scheme 本計劃內本人的所有帳戶  
 (2) the abovementioned account 上述的帳戶。

**(Note: If no option is specified, the relevant amendment request will automatically be applied to all account(s) under your name.**  
**注意: 如沒有註明選項, 有關更改要求將會自動應用於閣下名下的所有帳戶。)**

If you change the date of birth and the updated information shows that your age reached 50 and below 65 while you have invested in the MPF Default Investment Strategy, the investment allocation between Core Accumulation Fund and Age 65 Plus Fund, and the date of annual de-risking will be adjusted according to your updated date of birth. The change of date of birth will apply to all of your account(s) within the Scheme. For details, please refer to the MPF Scheme Brochure of the Scheme.

如閣下更改出生日期, 而更新資料後顯示閣下已年滿 50 歲並在 65 歲以下, 及有投資於強積金預設投資策略, 其核心累積基金及 65 歲後基金的投資分配及每年降低風險日, 將根據更新後的出生日期作出調整。而此更改出生日期將應用於閣下在本計劃內的所有帳戶。詳情請參閱本計劃之強積金計劃說明書。

Name of PAH / SVC / TVC 個人帳戶持有人 / 智易個人供款 / 可扣稅自願性供款姓名	English (英文)
	Chinese (中文) (Please provides supporting document(s) for change of name. 若更改姓名, 請提供證明文件。)
Residential Address 住址	
Telephone No. (Home) 電話號碼 (住宅)	Telephone No. (Office) 電話號碼(辦公室)
Mobile Phone No. 流動電話號碼	Fax No. 傳真號碼
E-mail Address 電郵地址	
Others, Please specify 其他 (請註明)	

**Part III Declaration and Signature 第三部份 聲明及簽署**

I hereby declare that all the information herein together with other documents in connection with this form are completed and true.  
本人在此聲明本表內之資料及其他之附件皆為完整及真確。  
Signature of PAH / SVC / TVC  
個人帳戶持有人 / 智易個人供款 / 可扣稅自願性供款簽署  
(Need to match with Trustee record 必須與信託人的記錄相符)

\_\_\_\_\_  
Date 日期

## 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, we 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 any mandatory provident fund (“**MPF**”) schemes 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 schemes or related products/services;
2. processing and evaluating any applications or requests made by you or in respect of your benefits on any MPF schemes or related products/services offered by the Company and our affiliates;
3. providing subsequent services to you on any MPF schemes or related business 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 any MPF schemes or related products/services provided by the Company and/or our affiliates;
5. evaluating your financial needs with respect to any MPF schemes and related products/services;
6. designing new or enhancing existing MPF schemes or related products/services of the Company and 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 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 (including the Mandatory Provident Fund Schemes Authority (“**MPFA**”) and the Securities and Futures Commission (“**SFC**”) in Hong Kong or elsewhere;
10. conducting identity and/or credit checks and/or debt collection for any MPF schemes and related business;
11. carrying out other services in connection with the operation of the Company’s MPF schemes or related business;
12. sending out administrative communications about any account you may have with the Company, other MPF schemes communications or about future changes to this Personal Information Collection Statement; and
13. 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 any of 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 any MPF schemes 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 schemes 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 schemes 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 (including the MPFA and the SFC) to whom the Company and/or our affiliates are requested or required by any applicable 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 schemes 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 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 obtain a copy of the 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:

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

A reasonable fee may be charged to offset the Company’s administrative and actual costs incurred in complying with your access requests.

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，我們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用途：

1. 向閣下推介和提供本公司及中國人壽保險（集團）公司的其他公司（“**本公司關聯方**”）的任何強制性公積金（“**強積金**”）計劃或相關產品／服務，以及提供、維持、管理和操作該等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任何強積金計劃或相關產品／服務提出的或者與閣下就該等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任何強積金計劃或相關業務向閣下提供後續服務，以及執行／管理該等強積金計劃或相關業務，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任何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索賠或權益的支付或轉移要求相關的任何目的；
5. 就任何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係的任何資料進行核對；
9. 滿足任何適用法律、規則、規例、實務守則或指引規定的要求（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（包括香港強制性公積金計劃管理局和香港證券及期貨事務監察委員會）執法及進行調查；
10. 為任何強積金計劃和相關業務進行身份和／或信用核查和／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、其他強積金計劃通訊或本聲明未來的變更發出行政性通訊；及
13. 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的職能的目的而與下列任何人士共享：

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任何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索賠相關的任何人士；
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／服務協助提供服務的任何代理、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. 任何適用法律、規定、法規、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（包括香港強制性公積金計劃管理局和香港證券及期貨事務監察委員會）。

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而就本公司和／或本公司關聯方提供的任何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，請聯絡我們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，獲取該資料的副本，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：

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

本公司可能會向閣下收取合理的費用，以抵銷本公司為執行閣下的資料查閱要求而引致的行政和實際費用。