



**CHINA LIFE MPF MASTER TRUST SCHEME ("the Scheme")**  
**中國人壽強積金集成信託計劃 (“本計劃”)**  
**智易個人供款 - 供款安排表格**  
**Smart Easy Personal Contributions – Contribution Arrangement Form**

**CL 82**

**I. MEMBER'S DETAIL 成員資料**

Name of Member 成員名稱	:	Chinese 中文	:	English 英文
Member No.: 成員編號	:		:	Scheme No.: 計劃編號
HKID/Passport No.: 香港身份證/護照號碼	:		:	Contact Tel. No.: 聯絡電話號碼
Effective Date (dd/mm/yy) 生效日期(日/月/年)	:		:	

**II. Amendment of Contribution Details 更改供款資料** (Please tick whichever is appropriate. 請在適當方格內填上“✓”號)

Add Lump Sum Contribution Amount (HK\$) (Note1,4)  
增加一次性供款為(港幣)(註 1,4) :

Set up Monthly Contribution Amount (HK\$(Note2,4)  
設立每月供款為(港幣)(註 2,4) :

Change Monthly Contribution Amount (HK\$) (Note4)  
更改每月供款金額為(港幣) (註 4) :

Suspend Monthly Contribution and **retain benefits** in all constituent funds  
暫停每月供款並保留全部基金內之權益

Suspend Monthly Contribution and **withdraw partial benefits** from constituent funds (Note3)  
暫停每月供款並提取部份基金內之權益(註 3)

Note 註 :

- Please return this form together with a crossed cheque made payable to “China Life MPF Master Trust Scheme” to us  
請將劃線支票連同此表格一併交回本公司，支票抬頭請填寫「中國人壽強積金集成信託計劃」。
- Please complete and return a Direct Debit Authorization form along with Contribution Arrangement Form.  
請填妥「直接付款授權書」並連同供款安排表格一同遞交。
- Please complete and return Benefit Withdrawal Form along with Contribution Arrangement Form.  
請填妥「提取利益表格」並連同供款安排表格一同遞交。
- Each monthly payment must not be less than HK\$300. In the case of irregular lump sum contribution, it must not be less than HK\$500. For investment in China Life Joyful Retirement Guaranteed Fund, the maximum aggregate amount of Smart Easy Personal Contributions (by way of new contributions) in any financial period of the Scheme must not exceed HK\$1,000,000, unless agreed by China Life Trustees Limited on a case by case basis.  
月供每次不能少於港幣 300 元，而一次性供款則每次不能少於港幣 500 元。投資於中國人壽樂安心保證基金的智易個人供款(以新供款方式)，除非中國人壽信託有限公司按個別情況同意，每一財政年度上限總額不得超過一百萬港元。

**III. Instruction 指示**

I hereby request to amend the above information in respect of my Smart Easy Personal Contribution Account. I confirm that the information provided herein is complete and accurate.  
有關本人之智易個人供款帳戶，本人現要求更改以上資料。本人確認在此所提供之資料實屬完備及正確。  
I acknowledge and confirm that I have read and understood and agree with the terms of the Personal Information Collection Statement (“PICS”) attached herein.  
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。

Signature of Member 成員簽署

Date 日期

**For Official Use Only 公司專用**

Input by:		Checked by:	
Date of input:		Date of checking:	

## 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係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。