



NOTES TO TRANSFER OF MPF ACCRUED BENEFITS (BENEFITS) BY EMPLOYER 僱主轉移強積金累算權益須知

Sections 150 and 150A 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 150 及 150A 條

Please read the following **important notes** before you complete the 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.
「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）的帳戶。
- (b) “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 the benefits of the employees are to be transferred.
「原受託人」（在《強制性公積金計劃（一般）規例》（簡稱《規例》）中亦稱「轉移受託人」）一指轉出僱員的權益的強積金計劃的受託人。
- (c) “New trustee” (also known as “transferee trustee” in the Regulation) - the trustee of an MPF scheme to which the benefits of the employees are to be transferred. If you elect to transfer the 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(E) will be the same as the original trustee.
「新受託人」（在《規例》中亦稱「承轉受託人」）一指轉入僱員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(E) 號表格所指的新受託人將與原受託人相同。
- (d) “Original scheme” - the MPF scheme from which the benefits of the employees are to be transferred.
「原計劃」一指轉出僱員的權益的強積金計劃。
- (e) “New scheme” - the MPF scheme to which the benefits of the employees are to be transferred. If you elect to transfer the benefits to another account within the same MPF scheme, the new scheme on Form MPF(S)-P(E) will be the same as the original scheme.
「新計劃」一指轉入僱員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(E) 號表格所指的新計劃將與原計劃相同。

- (2) Form MPF(S)-P(E) should be used when an employer wishes to transfer the benefits of its employees to another MPF scheme or when a new employer wishes to transfer the benefits of the employees of another employer to the new employer’s scheme. The latter case may occur when there is a change of ownership of the business or when the employees are transferred among associated companies. In such case, Form MPF(S)-P(E) should be completed by the new employer.
如僱主擬把僱員的權益轉移至另一個強積金計劃，或新僱主擬把另一名僱主的僱員的權益轉移至本身所參與的計劃，應使用第 MPF(S)-P(E) 號表格。後者的情況或會在業務擁有權有所變更，或僱員在有聯繫公司之間轉調時出現。在該情況下，第 MPF(S)-P(E) 號表格應由新僱主填寫。

- (3) *If the employee members are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that guaranteed fund as requested in Form MPF(S)-P(E) may result in some or all of the guarantee conditions not being satisfied; thus affecting their entitlements to the guarantee. Please check the offering document of the original scheme or consult the original trustee for details.*
對於現時投資於強積金保證基金的僱員而言，如根據第 MPF(S)-P(E) 號表格的要求從該保證基金轉出權益，可能會導致他們不符合部分或所有保證條件，以致影響他們享有保證的資格。詳情請查閱原計劃的要約文件，或向原受託人查詢。
- (4) *Please ensure that you have participated and enrolled your employees in the new scheme. Otherwise, you have to participate in and enrol your employees in that scheme before you submit Form MPF(S)-P(E) to the new trustee.*
請確保你已參加並已安排你的僱員登記參加新計劃。否則，你須先行參加並安排你的僱員登記參加該計劃，然後才向新受託人提交第 MPF(S)-P(E) 號表格。
- (5) *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(E) 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(E) 號表格後，之前由受託人採取的行政步驟未必能夠撤銷。
- (6) *If any information provided on Form MPF(S)-P(E) (including the signature) is incorrect or incomplete, the trustees may not be able to process the benefit transfer request.*
若你在第 MPF(S)-P(E) 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此項權益轉移要求。
- (7) *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. Copies of that offering document can be obtained from the new trustee upon request.*
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。你可向新受託人索閱要約文件。
- (8) *If you wish to make enquiries or seek assistance in making your election to transfer benefit, please contact your original trustee or new trustee. For general enquiries regarding benefit transfer, you may contact the Mandatory Provident Fund Schemes Authority 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，可聯絡強制性公積金計劃管理局（電郵地址：mpfa@mpfa.org.hk 或熱線電話：2918 0102）。

~End~
~完~



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EMPLOYER'S REQUEST FOR FUND TRANSFER FORM
僱主資金轉移申請表

Form 表格:
MPF(S) - P(E)

Sections 150 and 150A 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 150 及 150A 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 - TYPE OF TRANSFER 第 I 部 - 轉移類別

- (1) 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。
- Type 1 第 1 類: Transfer to another MPF scheme under the same employer
轉移至同一僱主的另一個強積金計劃
- Type 2 第 2 類: Transfer to another/same MPF scheme participated by the new employer (Please complete the form provided by the trustee on transfer of benefits upon change of business ownership / intra-group transfer for each employee involved) 轉移至新僱主參與的另一／同一個強積金計劃（請就轉移申請所涉及的每名僱員填寫由受託人提供有關在業務擁有權變更／集團內轉調的情況下轉移權益的表格）

**SECTION II - DETAILS OF EXISTING EMPLOYER (FOR TYPE 1 TRANSFER)
OR NEW EMPLOYER (FOR TYPE 2 TRANSFER) 第 II 部 - 現任僱主資料（適用於第 1 類轉移）或新僱主資料（適用於第 2 類轉移）**

(2) Name of employer^{Note 1}
僱主名稱^{註 1}: _____

(3) Correspondence address
通訊地址:

Flat/Room 室	Floor 樓層	Block 座	Building 大廈
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Street no. 街道號碼	Street 街道
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District 地區	* Hong Kong 香港 / Kowloon 九龍 / N.T. 新界
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(4) Name of contact person
聯絡人姓名: _____

- (5) (a) Telephone number
電話號碼： _____
- (b) Mobile phone number
手提電話號碼： _____
- (6) Facsimile number
傳真號碼： _____
- (7) Email address
電郵地址： _____

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

- (8) Details of the scheme from which benefits ^{Note 2} are to be transferred:
轉出權益^{註 2}的計劃的資料

Name of employer ^{Note 3} in the original scheme:

原計劃的僱主名稱^{註 3}： _____

Name of original trustee

原受託人名稱： _____

Name of original scheme

原計劃名稱： _____

Employer's identification number

^{Note 4}

僱主識別號碼^{註 4}： _____

Contributions to original scheme should be paid up to

向原計劃供款的最後日期： _____

日 dd 月 mm 年 yyyy

- (9) Do you wish to transfer the benefits ^{Note 2} of all employees participating in the original scheme? (please ✓ as appropriate)

你是否擬轉移所有參與原計劃的僱員的權益^{註 2}? (請於適當方格內填上✓號)

Yes 是

No 否

- (10) Details of the employee(s) whose benefits ^{Note 2} are to be transferred:

將獲安排轉移權益^{註 2}的僱員的詳細資料：

No. 編號	Name of employee 僱員姓名	HKID Card number ^{Note 5} of employee 僱員的香港身份證號碼 ^{註 5}
1		
2		
3		
4		
5		

(Employer may provide details of employees, together with authorized signature and company chop, on separate sheets of paper.)

(僱主可另紙提供僱員的詳細資料；請由獲授權簽署人簽署及蓋上公司印章。)

(11) Details of the scheme to which benefits are to be transferred:

轉入權益的計劃的資料

Name of new trustee

新受託人名稱：

Name of new scheme

新計劃名稱：

Employer's identification number^{Note 4}

僱主識別號碼^{註 4}：

Effective date of transfer

轉移開始生效日期：

日 DD	月 MM	年 YYYY	

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

(12) I/We* declare that: 本人／我們*聲明：

- (a) I/We* acknowledge and confirm that I/We* have read and understood and agree with the terms of the Personal Information Collection Statement (“PICS”) attached herein; and 本人／我們*知悉及確認本人／我們*已閱讀並明白及同意收集個人資料聲明條款。；及
- (b) I/We* have obtained consent(s) from the employee(s) and from the participating employer of the original scheme for using his/her/their personal data disclosed in this Form for the purpose(s) mentioned in this Form. 本人／我們*已獲得原計劃的僱員及參與僱主的同意，同意為達致本表格內所述的目的而使用他/她/他們於本表格內披露的個人資料。

(13) I/We* further declare that 此外，本人／我們*聲明：

- (a) I/We* have read and understood the Notes to Transfer of Benefits by Employer and the Explanatory Notes; and 本人／我們*已閱讀及明白《僱主轉移權益須知》及註釋的內容；及
- (b) I/We*, as the participating employer in the original scheme (applicable to Type 1 transfer ONLY), hereby provide notice of my/our* intention to cease participating in the original scheme in respect of the employee(s) identified in Section III; and 本人／我們*，作為原計劃的參與僱主(只適用於第 1 類轉移)，特此作出通知，本人／我們有意就第 III 部列出的僱員終止參與原計劃；及
- (c) to the best of my/our* knowledge and belief, the information given in this Form is correct and complete. 盡本人／我們*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 employer and company chop (if Applicable)^{Note 6}

[僱主簽署及公司印章 (如適用)]^{註 6}

Date 日期

Agent Name 代理人名稱		Agent Code 代理人編號		MPF Intermediaries 中介人編號	
For office use only 公司專用	Input by	Verify by	Remarks 備註		

Explanatory Notes 填報須知

- (1) In case of transfer of benefits of employees to the new scheme under a new employer, this refers to the new employer. 如把僱員的權益轉移至新僱主參加的新計劃，則指新僱主。
- (2) The benefits are confined to the benefits held in the contribution account(s) in the original scheme in respect of the employees of the existing employer. 所指的權益僅限於現任僱主的僱員在原計劃的供款帳戶內的權益。
- (3) Leave it blank if it is the same as the name of the employer in section II(2) 如這個名稱與第II(2)部的僱主名稱相同，則無須填寫此項。
- (4) 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) If you are in doubt of the number, please contact the relevant trustee. 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識別號碼(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)。如不清楚識別號碼，請聯絡有關受託人。
- (5) If any of the employees do NOT possess a HKID Card, please fill in their passport number and also indicate that it is a passport number. 如僱員沒有香港身份證，請填上他們的護照號碼，並註明其為護照號碼。
- (6)
 - (a) For transfer of benefits of employee(s) to the MPF scheme of a new employer, this Form must be signed by the new employer. 如把僱員的權益轉移至新僱主的強積金計劃，則本表格須由新僱主簽署。
 - (b) If the employer is not a natural person, this Form may be signed by the Managing Director, Chief Executive Officer or any person authorized to sign on behalf of the employer. 假如僱主並不是自然人，本表格可由行政總監、行政總裁或任何獲授權人士代表僱主簽署。

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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。