

永明彩虹強積金計劃 - 成員資料更改表格  
SUN LIFE RAINBOW MPF SCHEME -  
MEMBER INFORMATION CHANGE FORM



重要事項 Important Notes:

- 本表格所列之更改將取代所有之前已遞交永明信託有限公司(「受託人」)的資料/表格。如本表格沒有更新,現有資料維持不變。The changes filled in this form will supersede any previous information/form(s) which has/have been submitted to Sun Life Trustee Company Limited (the "Trustee"). Information will remain unchanged if no update in this form.
- 如屬自僱人士,請填寫「自僱人士資料更改表格」。For Self-employed Person, please complete the "Self-employed Person Information Change Form".
- 本表格內更改的資料,將根據閣下所提供的香港身份證/護照號碼更新至閣下於永明彩虹強積金計劃內所有強積金帳戶。The information updated in this form will be applied to all your MPF accounts under Sun Life Rainbow MPF Scheme according to the HKID / Passport Number provided.
- 你必須在改變後的 30 天內通知受託人有關的改變並提供適當地更新的自我證明。You must notify the Trustee within 30 days if there is any change in circumstances that makes any of the information provided in the self-certification incorrect or incomplete and provide a suitably updated self-certification form.
- 請用正楷填寫本表格,並在適當空格內加(✓)號。Please complete this form in BLOCK LETTERS and tick the appropriate boxes.
- 如須作出任何刪改,請於刪改之位置旁簽署,而該簽署必須與第四部份之成員簽署相同。Please countersign next to any corrections you make on this form with the same member signature as shown in Section IV.



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第一部分 SECTION I 個人資料 PERSONAL DETAILS

成員姓名  
Name of Member  
(須與香港身份證/護照上的  
相同 Must be same as  
HKID / Passport)

(姓 Surname)

(名 Given Name)

成員編號  
Member No.

電話號碼  
Telephone No.

身份證明文件  
Identity Document

☐ 香港身份證號碼 HKID No.

( )

☐ 護照號碼 Passport No.

(護照號碼僅供沒有香港身份證的成員填寫 Passport No. is applicable **ONLY** for member without HKID Card)

第二部分 SECTION II 更新個人記錄 (只需填上適用部分)  
UPDATE PERSONAL RECORD (Only Complete Relevant Part(s))

請在適當方格加上剔號 (✓)。Please check (✓) the appropriate box(es).

☐ 更改聯絡資料 Change of Contact Information

住址 <sup>備註 1</sup> (郵政信箱恕不受理) New Residential Address <sup>Note 1</sup> (P.O. Box will **NOT** be accepted)

只需提供中文或英文地址 Please provide either Chinese **OR** English address below:

室 Flat / Room

樓 Floor

座 Block

大廈 / 屋邨

Building / Estate

門牌號碼及街道名稱

Number and name of Street

地區/城市

District Area / City



香港  
Hong Kong



九龍  
Kowloon



新界  
New Territories

國家

Country

(適用於非香港地址 applicable to non-Hong Kong address)

備註 Notes:

- 如新住址適用於特選私人帳戶,請附上住址證明副本連同此表格一併遞交。可接納為住址證明的文件是由水/電/煤/中央石油氣供應商、銀行、政府部門等在申請日前三個月內發出的文件、收費單或通知書。If the new residential address is applicable to Special Private Account, please attach a copy of address proof and submit with this form. Valid address proof is document, bill or correspondence issued within the last three month from the submission date by utility companies, banks, government department etc.

## 新通訊地址 New Correspondence Address

只需提供中文或英文地址 Please provide either Chinese OR English address below:

- ☐ 以本人於計劃內最新的住址記錄更新本人通訊地址 (如已選擇此項, 則無需在本部分提供地址。)  
Update my correspondence address according to the latest record of the residential address under the Scheme (If you tick this item, you are not required to provide address in this part.)

室 Flat / Room \_\_\_\_\_ 樓 Floor \_\_\_\_\_ 座 Block \_\_\_\_\_

大廈 / 屋邨  
Building / Estate \_\_\_\_\_

門牌號碼及街道名稱  
Number and name of Street \_\_\_\_\_

地區 / 城市  
District Area / City \_\_\_\_\_

☐ 香港  
Hong Kong

☐ 九龍  
Kowloon

☐ 新界  
New Territories

國家  
Country \_\_\_\_\_

(適用於非香港地址 applicable to non-Hong Kong address)

## 新聯絡電話及電郵地址 New Contact No. and E-mail Address

電話號碼 Telephone No. \_\_\_\_\_  
住宅 Home \_\_\_\_\_  
( )  
國家號碼 Country Code

公司 Office \_\_\_\_\_  
( )  
國家號碼 Country Code

如欲登記/取消以下服務, 請在適當空格內加 (✓) 號, 並請閱讀以下相關條款。 Please tick the appropriate box if you want to enroll / cancel the below service and please read the relevant terms below.

### 強積金帳戶結餘短訊提示服務

#### MPF Account Balance SMS Service

☐ 登記 Enroll ☐ 取消 Cancel

### 以電子通訊收取受監管的通知

#### E-Notification for Regulatory Documents

☐ 登記 Enroll ☐ 取消 Cancel

電郵地址  
Email Address \_\_\_\_\_



### 強積金帳戶結餘短訊提示服務 MPF Account Information SMS Service

每季以短訊通知成員自帳戶成立日截至季末的 1) 帳戶結餘及 2) 盈 / (虧) 總額。服務詳情如下:

Member will receive an SMS each quarter including the information of 1) account balance and 2) gain/(loss) amount since account setup to the quarter end. Service details are as follows:

1. 本服務包括成員在本計劃下的所有現存帳戶。 This service covers all existing accounts of members under the Scheme.
2. 短訊將發出最後更新的有效香港手提電話號碼。 SMS will be sent to the latest record of valid Hong Kong mobile number under the Scheme.
3. 短訊語言將根據本計劃最後紀錄的語言選擇。 SMS language will follow the latest record of language selection under the Scheme.



### 以電子通訊收取受監管的通知 E-Notification for Regulatory Documents

在「以電子通訊收取受監管的通知」旁邊的方格內加上剔號, 即代表閣下同意永明信託有限公司(「受託人」) 以電子方式取代郵寄提供予閣下(即於本永明彩虹強積金計劃表格上指定之成員)紙本的受監管通知 (包括但不限於成員權益報表、基金便覽、主要計劃資料文件、強積金計劃說明書及其補充資料及受託人不時定義的其他文件), 受託人不時定義的特別情況除外。根據此電子形式安排, 適用的受監管通知會依據適用的時序被上載到網上退休金服務中心。我們將以電郵或短訊通知閣下在網上退休金服務中心查閱相關的受監管文件(短訊通知只適用於香港本地電話號碼, 並只會發放給沒有提供電郵地址或沒有有效電郵地址的客戶)。如閣下欲更改電郵地址、流動電話號碼或取消此項服務, 請至少在 14 天前透過本公司之網上退休金服務中心或聯絡客戶服務熱線遞交通知, 或填妥及寄回更改表格給本公司辦理。 By checking the box for "E-Notification for Regulatory Documents" above, you consent to the use of electronic means by Sun Life Trustee Company Limited ("the Trustee") for giving you (being the named member of the Sun Life Rainbow MPF Scheme on this form) a number of regulatory documents (including but not limited to annual member benefit statements, fund fact sheets, KSID, MPF Scheme Brochures and addendum of the MPF Scheme Brochure or such documents as may be defined by the Trustee from time to time) in place of physical delivery of hard copies, save for exceptional circumstances as may be defined by the Trustee from time to time. Under this electronic arrangement, the applicable regulated documents will be uploaded to the Online Pension Services Center under the applicable timeline and you will receive an email or a SMS reminder (SMS only applicable for local HK number and it would only be sent if no email address is provided or invalid) whenever a specific document is ready for viewing at the Online Pension Services Center. For any change in email address, mobile number or cancellation of this service, please inform us at least 14 days in advance by submitting your request through our Online Pension Services Centre or contact our Sun Life Pension Services Hotline, or complete and return the Information Change Form.

☐ 更改語言選擇 (用作與成員聯絡通訊) **Change of Language Selection (For Member Communication)**

新語言選擇為:

New Language Selection:

☐

中文

Chinese

☐

英文

English

☐ 身份證明文件 **Identity Document**

☐

香港身份證 HKID

☐

護照 Passport

身份證明文件號碼 Identity Document No.

請附上已更新的身份證/護照副本及原有已登記的身份證明文件副本。 Please enclose a copy of the new HKID Card / Passport copy and original registered Identity Document copy.

☐ 更改姓名或簽署式樣<sup>備註 2</sup> **Change of Name or Signature Specimen<sup>Note2</sup>**

成員姓名 Name of Member (須與香港身份證 / 護照上的相同 must be same as HKID / Passport)

(英文 English)

( 姓 Surname )

( 名 Given Name )

(中文 Chinese)

( 姓 Surname )

( 名 Given Name )

稱銜  
Title

☐

先生 Mr

☐

女士 Ms

新簽署式  
New Signature Specimen

☐ 國籍

Nationality

☐ 帳戶文件要求 **Request of Account Document**

☐

最近期的成員權益報告 The latest Member Benefit Statement

☐

由

from

(月/年)至

(MM/YY) to

(月/年) 的供款報告

(MM/YY) Contribution Statement

☐

強積金帳戶結餘摘要 MPF Account Balance Summary

☐

其他 Others (請列明 please specify) :

☐ 其他更改 **Other Changes (請列明 Please specify)**

**備註 Notes:**

2. 若需要更改登記於計劃內的姓名，你需要附上結婚證書及新身份證之副本或附上改名契及新身份證之副本。閣下的現有成員簽署式樣（後頁）須與行政管理人記錄相符，以上之新簽署式樣方可生效。 For change of name to be registered in our records you must attach a copy of the Marriage Certificate and your new Hong Kong Identity Card or a copy of the Deed Poll and your new Hong Kong Identity Card. The above New Signature Specimen will be effective provided that your existing signature specimen (next page) is consistent with the Administrator's record.

### 第三部分 SECTION III

### 個人資料收集聲明 (2018-03 版本)

### PERSONAL INFORMATION COLLECTION STATEMENT (Version 2018-03)

申請人 / 成員明白及同意永明信託有限公司(「受託人」)可以將其所收集的任何個人資料(不論由此申請表所收集或由其他途徑取得)作以下用途:(i)處理成員的此項申請及任何其他申請;(ii)為申請人 / 成員參與本計劃;(iii)管理成員於本計劃的供款和累算權益的事宜;(iv)進行客戶調查;(v)為客戶研究及設計金融、保險或退休金產品;(vi)為申請人 / 成員甄選及參與獎賞、忠實或特選客戶計劃;(vii)因上述目的與成員聯絡;(viii)與上述目的直接有關的任何其他目的;及(ix)為遵守適用的法例、法規或法庭命令。

受託人亦可使用申請人 / 成員的聯絡資料、基本個人資料投資選擇及累算權益、就本計劃的產品的推廣資訊、以包括電話、郵件、電郵、電話短訊或任何電子信息等方法聯絡申請人 / 成員。除非得到申請人 / 成員同意(包括表示不反對),否則受託人不可使用申請人 / 成員資料為該用途。若申請人 / 成員不同意接受此等推廣資訊,可於表格的適當位置填上剔號。

受託人可為以上目的披露申請人 / 成員的個人資料予(a)為協助受託人就上述用途(不論在香港或其他地方)而提供服務的第三方,包括計劃管理人(條件是有關承辦商須把所有個人資料保密並只會為提供有關服務而使用個人資料);(b)申請人 / 成員的銀行作繳款用途;(c)申請人 / 成員的保險經紀(如有);(d)申請人 / 成員的強積金中介人;(e)受託人的關連公司(根據公司條例訂明)包括保險公司及金融服務機構;(f)受託人及其關連公司(不論在香港與否)為遵守監管當局或其他機構發出之指引或就其法例、法規或法庭頒令所約束或規定之責任而需向其作出披露的任何人士;(g)有關僱主;及(h)按法例要求或准許的其他人士。

受託人可就法例准許或於獲得申請人 / 成員的同意後披露或將申請人 / 成員的個人資料作其他用途。

申請人 / 成員明白申請人 / 成員所提供之個人資料均屬自願,然而倘若未能提供所需個人資料,可導致受託人無法處理申請人 / 成員的申請。申請人 / 成員有權查閱及要求更正受託人持有有關成員的個人資料,有關要求可以書面形式郵寄至香港九龍紅磡德豐街 18 號海濱廣場一座 10 樓卓譽金融服務有限公司退休金管理部經理。受託人可就處理任何該等要求收取合理費用。

☐ 若閣下不同意收取由受託人發出的推廣資訊,請於方格內填上剔號。

Applicant/Member(s) understand(s) and consent(s) that, any personal data collected by Sun Life Trustee Company Limited ("Trustee") (whether collected in this application form or otherwise) may be used by the Trustee for the following purposes: (i) processing this application and any other applications applicant/member(s) make(s); (ii) enrolling applicant/member(s) in the Scheme; (iii) administering and managing applicant/member(s)' contributions and accrued benefits under the Scheme; (iv) conducting customer surveys; (v) researching and designing financial, insurance or pensions products for customer use; (vi) selecting and participating in reward, loyalty or privileges program and related service for applicant/member(s); (vii) contacting applicant/member(s) for the above purposes; (viii) purposes which are directly related to the above purposes; and (ix) complying with applicable laws, regulation or court order.

The Trustee may also use applicant/member(s)' contact details, demographic information, investment choices and accrued benefits to contact applicant/member(s) with marketing information regarding the Scheme, including by phone calls, mail, email, SMS or any type of electronic message. The Trustee may not so use applicant/member(s)' data unless the Trustee have received applicant/member(s)' consent (which includes an indication of no objection). Tick the box in appropriate area in the form if member(s) do(es) not consent to receive such marketing information.

The Trustee may disclose member(s)' personal data for the above purposes: (a) to third parties who provide services in Hong Kong or elsewhere which assist the Trustee to carry out the above purposes, including scheme administrator (provided that such contractors are required to keep all such personal data confidential and may only use the personal data to provide those services); (b) to applicant/member(s)' bank for payment purposes; (c) to applicant/member(s)' insurance broker (if any); (d) to applicant/member(s)' MPF intermediaries; (e) to the Trustee's related companies (as defined in the Companies Ordinance) including insurance companies and financial services companies; (f) to any person to whom the Trustee or its related companies (inside or outside Hong Kong) is under an obligation to make disclosure under the requirements of any law, regulation or court order binding on or applying to or to which the Trustee or its related companies (inside or outside Hong Kong) is subject to, or under and for the purposes of any guidelines issued by regulatory or other authorities with which the Trustee or its related companies (inside or outside Hong Kong) is expected to comply; (g) relevant employer(s) and (h) as otherwise required or permitted by law.

The Trustee may also use and disclose member(s)' personal data in other ways with applicant/member(s)' consent or as otherwise required or permitted by law.

Applicant/Member(s) understand(s) that the information applicant/member(s) gave is voluntary, but failure to provide the requested personal data may mean the Trustee is unable to process applicant/member(s)' application. Applicant/Member(s) has/have the right to seek access to and request correction of any personal data the Trustee holds by sending a written request to The Manager, Pensions Administration Department, BestServe Financial Limited, 10/F, One Harbourfront, 18 Tak Fung Street, Hung Hom, Hong Kong. The Trustee may charge a reasonable fee for the processing of any such requests.

☐ Please tick if you do not wish to receive marketing information from the Trustee.

### 第四部分 SECTION IV 聲明 DECLARATION

本人(作為成員身份),謹此確定以上細則/或附上之資料(如有)皆為真實正確。

I, the Member, hereby confirm that the above details and the attached information (if any) are true and correct.

備註 Notes:

成員簽署<sup>Note3</sup> Signature of Member<sup>Note3</sup>

3. 成員簽署必須與之前遞交予本計劃行政管理人的式樣相同。如成員簽署與紀錄不符,我們將邀請閣下到客戶服務中心作身份核實。中心職員將要求閣下出示香港身份證(或護照)以核實閣下身份。如閣下已忘記簽署式樣,請攜同此表格及香港身份證(或護照)親臨我們的客戶服務中心作身份核實。Signature of member must be same as the previous specimen submitted to the Administrator of the Scheme. If your signature does not match with our record, you will be invited to our Client Service Centre for identity verification. Our staff will request you to present your HKID card (or passport) to verify your identity. If you forget your signature specimen, please bring along this form and your HKID card (or passport) in person to our Client Service Centre for identity verification.

日期  
Date

\_\_\_\_/\_\_\_\_/\_\_\_\_

日/月/年  
DD/MM/YYYY

請將填妥表格交予:

永明彩虹強積金計劃行政管理人 — 卓譽金融服務有限公司  
香港九龍紅磡德豐街 18 號海濱廣場一座 10 樓

Please send the completed form to:

Sun Life Rainbow MPF Scheme, The Administrator, BestServe Financial Limited  
10/F, One Harbourfront, 18 Tak Fung Street, Hung Hom, Kowloon, Hong Kong

電話: 3183 1888 傳真: 3183 1889 網址: www.sunlife.com.hk

Tel: 3183 1888 Fax: 3183 1889 Website: www.sunlife.com.hk