文件編號
Form Code
PP

Sun Life 永明金融

SUN LIFE MPF BASIC / COMPREHENSIVE SCHEME

EMPLOYEE CHOICE ARRANGEMENT ("ECA") – TRANSFER ELECTION FORM [FORM MPF(S)-P(P)]

永明強積金基本 / 綜合計劃

「僱員自選安排 」– 轉移選擇表格 [第 MPF(S)-P(P) 號表格]

(For an employee to transfer accrued benefits from a contribution account in a scheme under current employment ("Original Scheme") to an account in a scheme elected by the employee ("New Scheme") during employment)

(適用於僱員在現職期間把現職的計劃(「原計劃」)供款帳戶內的累算權益轉移至自選計劃(「新計劃」)的帳戶)

Sections 148A and 148B of the Mandatory Provident Fund Schemes (General) Regulation ("the Regulation")

《強制性公積金計劃 (一般) 規例》(《規例》) 第148A 及148B條

(a) Please read the Explanatory Notes and Guide to Transfer Benefits Under Employee Choice Arrangement ("ECA") (the "Guide") on page 4 to 6 carefully before you complete this Form. 填寫本表格前， 請先閱讀第4至6頁的註釋及《「僱員自選安排」權益轉移指南》(《指南》)。

(b) Please use BLOCK LETTERS to complete this Form. 請以正楷填寫本表格。

(c) The personal data to be supplied 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 approved 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」）。

(d) Please submit another notice to original/new trustee for any request(s) other than the purpose of this Form separately. 請就本表格以外之要求，分別向原/新受託人另行提交通知。

Section I Scheme Member Details 第 I 部 計劃成員資料

Name (English) ##
姓名 (英文) ##
(Surname 姓氏) (Given Names 名字)

Name (Chinese) ##
姓名 (中文) ##
(Surname 姓氏) (Given Names 名字)

Title Mr/Ms/Miss/Others*
稱銜 先生/女士/小姐/其他*

HKID Card No.
香港身份證號碼

Passport No. ++
護照號碼++

Contact Details
聯絡資料

Home Tel. No.
住宅電話號碼

Mobile Phone No.
手提電話號碼

Fax No.
傳真號碼

Email Address
電郵地址

Correspondence Address
通訊地址

Section II Contribution Account Information in Original Scheme 第 II 部 原計劃的供款帳戶資料

Name of Original Scheme Note 2 原計劃名稱 註 2 :

Scheme Member Account No. Note 2 計劃成員帳戶號碼 註 2 :

Employer's Identification No. Note 2,3 僱主識別號碼 註2，3 :

Section III Contribution Account Information in New Scheme 第 III 部 新計劃的供款帳戶資料

Name of New Scheme Note 2 新計劃名稱 註 2 :

Scheme Member Account No. Note 2 計劃成員帳戶號碼 註 2 :

Employer's Identification No. Note 2,3 僱主識別號碼 註2，3 :

Section IV Transfer Election 第 IV 部 轉移選擇

Tick one box only 只選一項

☐ Transfer all accrued benefits in the Original Scheme to the New Scheme 轉移原計劃的累算權益至新計劃

☐ Transfer accrued benefits in the Original Scheme to the New Scheme except the following 轉移原計劃的累算權益至新計劃，惟下列權益除外

☐ Transfer accrued benefits in the Original Scheme to the New Scheme except the following 轉移原計劃的累算權益至新計劃，惟下列權益除外

Section V Signature 第 V 部 簽署

Signature of Scheme Member
計劃成員簽署

Date
日期

Section VI Employer's Confirmation 第 VI 部 僱主確認

Signature of Employer
僱主簽署

Date
日期

Section VII Trustee's Acceptance 第 VII 部 受託人接受

Signature of Trustee
受託人簽署

Date
日期

Section VIII Trustee's Confirmation 第 VIII 部 受託人確認

Signature of Trustee
受託人簽署

Date
日期

Section IX Trustee's Notification 第 IX 部 受託人通知

Signature of Trustee
受託人簽署

Date
日期

Section X Trustee's Notification 第 X 部 受託人通知

Signature of Trustee
受託人簽署

Date
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Section XI Trustee's Notification 第 XI 部 受託人通知

Signature of Trustee
受託人簽署

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Section XII Trustee's Notification 第 XII 部 受託人通知

Signature of Trustee
受託人簽署

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Section XIII Trustee's Notification 第 XIII 部 受託人通知

Signature of Trustee
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Section XIV Trustee's Notification 第 XIV 部 受託人通知

Signature of Trustee
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Section XV Trustee's Notification 第 XV 部 受託人通知

Signature of Trustee
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Section XVI Trustee's Notification 第 XVI 部 受託人通知

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Section XVII Trustee's Notification 第 XVII 部 受託人通知

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Section XVIII Trustee's Notification 第 XVIII 部 受託人通知

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Section XIX Trustee's Notification 第 XIX 部 受託人通知

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Section XX Trustee's Notification 第 XX 部 受託人通知

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Section XXXXXXXXXXXXXXVIII Trustee's Notification 第 XXXXXXXXXXXXXXVIII 部 受託人通知

Signature of Trustee
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Section XXXXXXXXXXXXXXIX Trustee's Notification 第 XXXXXXXXXXXXXXIX 部 受託人通知

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Section XXXXXXXXXXXXXXX Trustee's Notification 第 XXXXXXXXXXXXXXX 部 受託人通知

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Section III Transfer of Accrued Benefits Note 4 第 III 部 轉移累算權益 註 4

Please indicate the part(s) of accrued benefits in your contribution account of Original Scheme that you wish to transfer out to another MPF account. 請說明你希望把原計劃供款帳戶內哪部分的累算權益轉移至另一個強積金帳戶。

Please select either option (a) **or** (b) and ✓ as appropriate: 請選擇方案 (a) **或** (b)，並在適當方格內加上✓ 號：

☐ (a) **Transfer ALL Accrued Benefits 轉移全部累算權益**

I wish to transfer **ALL** the accrued benefits comprising the following parts from my contribution account of Original Scheme as its governing rules permit: 本人希望把原計劃供款帳戶內管限規則許可的以下**全部**累算權益轉移：

- Employee mandatory contributions in current employment Note 5,6 現職期間的僱員強制性供款 註 5，6
- Employee voluntary contributions in current employment Note 7,8 現職期間的僱員自願性供款 註 7，8
- Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s) Note 9 以往工作所累積並已轉移至供款帳戶的強制性供款 註 9
- Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s) Note 8,10 以往工作所累積並已轉移至供款帳戶的自願性供款 註 8，10

Please transfer the accrued benefits to the following personal account: 請把累算權益轉移至以下個人帳戶：

Name of New Scheme Note 11 **新計劃名稱** 註 11	
Scheme Member Account No. Note 11 **計劃成員帳戶號碼** 註 11	

OR 或

☐ (b) **Transfer Part(s) of Accrued Benefits 轉移部分累算權益**

I wish to transfer the following **part(s)** of the accrued benefits from my contribution account of Original Scheme as its governing rules permit: 本人希望轉移原計劃供款帳戶內管限規則許可的以下**部分**的累算權益：
(you may select one or more parts below and ✓ as appropriate) （你可選擇轉移以下其中一部分或多個部分，請在適當方格內加上✓ 號）

Accrued benefits to be transferred from Original Scheme **由原計劃轉出的累算權益**	**Type of account receiving the accrued benefits** **接收累算權益的帳戶類別**
☐ Employee mandatory contributions in current employment Note 5,6 現職期間的僱員強制性供款 註 5，6 ☐ Employee voluntary contributions in current employment Note 7,8 現職期間的僱員自願性供款 註 7，8	Personal account only 只限個人帳戶
☐ Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s) Note 9 以往工作所累積並已轉移至供款帳戶的強制性供款 註 9 ☐ Voluntary contributions that have been transferred into the contribution account and are attributable to former employment(s) Note 8,10 以往工作所累積並已轉移至供款帳戶的自願性供款 註 8，10	Personal account **or** contribution account 個人帳戶 **或** 供款帳戶

Please transfer the accrued benefits selected above to the following account:

請把上述選擇的累算權益轉移至以下帳戶：

Name of New Scheme Note 11 **新計劃名稱** 註 11	
Account Type Note 11 **帳戶類別** 註 11 (Select one only* and ✓ as appropriate) (只可選一項*，請於適當方格內加上✓號)	☐ Personal account 個人帳戶 **or** ☐ Contribution account 供款帳戶 (Employer's Identification No.: Note 3, 11) (僱主識別號碼: 註 3，11)
Scheme Member Account No Note 11 **計劃成員帳戶號碼** 註 11	

* If you wish to transfer different parts of accrued benefits from your contribution account to different MPF accounts, please fill in a separate Form MPF(S)-P(P) for each MPF account that receives the accrued benefits.

* 如欲把供款帳戶內不同部分的累算權益轉移至不同的強積金帳戶，請分別就每個將會接收該等累算權益的強積金帳戶填寫一份第 MPF(S)-P(P)號表格。

Section IV Authorization and Declaration 第IV部 授權及聲明

(a) I hereby give consent to the approved trustee of New Scheme and the MPFA to disclose information supplied by me in support of this election of transfer to the approved 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，新計劃的核准受託人及積金局可為處理本人的轉移申請，向相關核准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。

(b) I confirm and declare that: 本人確認及聲明：

- I have read and understood the Explanatory Notes and the Guide, and have voluntarily elected to transfer my MPF accrued benefits in accordance with this Form; 本人已閱讀及明白註釋及《指南》的內容，並自願選擇按照本表格轉移強積金累算權益；
- at the date of submitting this Form, I am employed by the employer in relation to the contribution account in Original Scheme; and 在提交本表格當日，本人受僱於為本人開設原計劃供款帳戶的僱主；及
- 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正確及詳盡。

Signature of the Scheme Member Note 12 計劃成員簽署 註 12

Date 日期 dd 日/mm 月/yyyy 年

To be completed by MPF Intermediary 請由強積金中介人填寫:

Sun Life Retirement Scheme Hotline: 3183 1900
永明退休金計劃熱線: 3183 1900

For MPF Intermediary only 只適用於強積金中介人

☐ **I confirm that regulated activity is involved / conducted in this benefits transfer. 本人確認於是次權益轉移中涉及 / 進行受規管活動。**

If I have not : (i) ticked the box above; and (ii) submitted any "MPF Customer Declaration Form", it shall be regarded as no regulated activity is conducted in this benefits transfer.
如本人：(i) 沒有於以上方格填上剔號；及(ii) 沒有遞交「強積金客戶聲明書」，即代表本人於是次權益轉移中並沒有進行受規管活動。

NOTE : If regulated activity is involved / conducted, then this request form must be accompanied by a duly signed "MPF Customer Declaration Form".
附註 ：若當中涉及 / 進行受規管活動，此申請表格必須跟客戶已簽妥之「強積金客戶聲明書」一併遞交。

Name of MPF Intermediary (English) 強積金中介人姓名（英文） _____

Agent Code 營業員編號 _____

Contact Tel. No. 聯絡電話號碼 _____

Sun Life Pension Trust Limited 永明退休金信託有限公司

Please complete this Form at page 1 to 3 and submit it (excluding the Explanatory Notes and Guide to Transfer Benefits Under Employee Choice Arrangement ("ECA")) to the approved trustee of New Scheme. If you want to transfer your accrued benefit to Sun Life MPF Basic / Comprehensive Scheme, please submit the Form to:

Sun Life MPF Basic / Comprehensive Scheme, The Administrator, BestServe Financial Limited
10/F, One Harbourfront, 18 Tak Fung Street, Hunghom, Kowloon, Hong Kong Tel: 3183 1900 Fax: 3183 1901

請填妥本表格的第 1 至 3 頁，並將填妥表格遞交（註釋及「僱員自選安排」權益轉移指南無須提交）予新計劃的核准受託人。如閣下欲將你的累算權益轉移至永明強積金基本 / 綜合計劃，請將此表格交予：

永明強積金基本 / 綜合計劃行政管理人 - 卓譽金融服務有限公司
香港九龍紅磡德豐街 18 號海濱廣場一座十樓 電話：3183 1900 傳真：3183 1901

Explanatory Notes 註釋

(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 election may not be processed if the Name of Original Scheme, Scheme Member Account Number or the Employer's Identification Number is not provided or is incorrect. This information can be found in your membership certificate, notice of acceptance, notice of participation or annual benefit statement. If you are in doubt, please contact your approved trustee of Original Scheme or your employer. Please refer to the MPFA website (www.mpfa.org.hk) for the name of schemes. 如你沒有提供原計劃名稱、計劃成員帳戶號碼或僱主識別號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可於成員證明書、接納通知、參與通知或周年權益報表獲取有關資料。如有疑問，請聯絡你原計劃的核准受託人或僱主。有關強積金計劃的名稱，可參閱積金局網站（www.mpfa.org.hk）。

(3) The Employer's Identification Number is the number assigned by the approved trustee to the employer concerned. Approved 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 approved trustees or through the member enquiry facilities available from approved trustees. If you are in doubt, please contact your approved trustee or your employer. 僱主識別號碼即核准受託人為有關僱主編配的號碼。核准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）。你可查閱核准受託人發出的報表上或透過核准受託人提供的成員諮詢服務獲取該號碼。如有疑問，請聯絡你的核准受託人或僱主。

(4) If any part of the accrued benefits chosen under section III contains nil balance, that part will not be processed. 如你在第 III 部選擇轉移的累算權益的任何部分是「零」結餘，則該部分權益的轉移申請將不獲處理。

(5) (a) This means all accrued benefits in the sub-account referred to in section 78(6)(b) of the Regulation. 這是指《規例》第 78(6)(b)條所提述的分帳戶內的全部累算權益。

(b) For a casual employee in an industry scheme, this sub-account generally contains the accrued benefits derived from all the employee mandatory contributions made to this sub-account whilst working as a casual employee with different employers. 就行業計劃的臨時僱員而言，這個分帳戶一般包含在以臨時僱員身份受僱於不同僱主期間向這個分帳戶所作出的所有僱員強制性供款所產生的累算權益。

(6) If you have already elected to transfer out the accrued benefits derived from the employee mandatory contributions once (or, if the governing rules of Original Scheme allow more than once, but the transfer elections you have made have reached the maximum number of times allowed by the governing rules) in the same calendar year, transfer of that part of the accrued benefits will not be processed. Please refer to paragraph (4) of the Guide for more information. 如你已於同一公曆年內要求把僱員強制性供款所產生的累算權益轉出一次（或如原計劃的管限規則准許你作出多於一次的轉移，但你轉移的次數已達該上限），則該部分累算權益的轉移申請將不獲處理。詳情請參閱《指南》的第(4)段。

(7) (a) This means all accrued benefits in the sub-account referred to in section 78(6)(e) of the Regulation. 這是指《規例》第78(6)(e)條所提述的分帳戶內的全部累算權益。

(b) For a casual employee in an industry scheme, this sub-account generally contains the accrued benefits derived from all the employee voluntary contributions made to this sub-account whilst working as a casual employee with different employers. 就行業計劃的臨時僱員而言，這個分帳戶一般包含在以臨時僱員身份受僱於不同僱主期間向這個分帳戶所作出的所有僱員自願性供款所產生的累算權益。

(8) If you request to transfer out the accrued benefits derived from the voluntary contributions but the governing rules of Original Scheme do not allow this, the option(s) will not be processed. Please refer to paragraph (3) of the Guide for more information. 如你要求把自願性供款所產生的累算權益轉出，但原計劃的管限規則並不准許轉移，則有關轉移選項將不獲處理。詳情請參閱《指南》的第(3)段。

(9) This means all accrued benefits in the sub-account referred to in section 78(6)(c) of the Regulation. This part generally contains accrued benefits derived from the mandatory contributions that are attributable to your former employment(s) or former self-employment(s) and that have been transferred into the contribution account under current employment. 這是指《規例》第 78(6)(c)條所提述的分帳戶內的全部累算權益。這部分一般包含可歸因於以往受僱或自僱工作並已轉移至現職供款帳戶的強制性供款所產生的累算權益。

(10) This means all accrued benefits in the sub-account referred to in section 78(6)(f) of the Regulation. This part generally contains accrued benefits derived from the voluntary contributions that are attributable to your former employment(s) or former self-employment(s) and that have been transferred into the contribution account under current employment. 這是指《規例》第78(6)(f)條所提述的分帳戶內的全部累算權益。這部分一般包含可歸因於以往受僱或自僱工作並已轉移至現職供款帳戶的自願性供款所產生的累算權益。

(11) The transfer election may not be processed if the Name of New Scheme, Account Type, Employer's Identification Number or your Scheme Member Account Number is not provided or is incorrect. The information can be found in your membership certificate, notice of acceptance, notice of participation or annual benefit statement. You may, however, leave the Employer's Identification Number and the Scheme Member Account Number blank if you have recently enrolled in the scheme and have not been notified of those numbers. If you are in doubt, please contact your approved trustee of New Scheme. Please refer to the MPFA website (www.mpfa.org.hk) for the name of schemes. 如你沒有提供新計劃名稱、帳戶類別、僱主識別號碼或計劃成員帳戶號碼，或所提供的資料有誤，則此項轉移申請或不獲處理。你可於成員證明書、接納通知、參與通知或周年權益報表獲取有關資料。不過，如你最近才參加計劃，並未獲悉僱主識別號碼及計劃成員帳戶號碼，則可留空此項。如有疑問，請聯絡你新計劃的核准受託人。有關強積金計劃的名稱，可參閱積金局網站（www.mpfa.org.hk）。

(12) The signature must be the same as your specimen signature previously submitted to your approved trustee of Original Scheme. Please note that the transfer may not be processed if the signature provided in this Form does not match with the specimen signature previously given to your approved trustee of Original Scheme. If you are in doubt, please contact your approved trustee of Original Scheme. 你的簽署必須與你之前給予原計劃核准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提交予原計劃的核准受託人的簽署式樣不符，有關轉移或不獲處理。如有疑問，請聯絡你原計劃的核准受託人。

Guide to Transfer Benefits Under Employee Choice Arrangement ("ECA")

「僱員自選安排」權益轉移指南

Sections 148A and 148B of the Mandatory Provident Fund Schemes (General) Regulation ("the Regulation")
《強制性公積金計劃（一般）規例》（《規例》）第 148A 及 148B 條

Explanation of terms used in Form MPF(S)-P(P), the Explanatory Notes and this Guide: 第 MPF(S)-P(P)號表格、註釋及本《指南》的用詞解釋：

(a) "Contribution account" – has the same meaning as in section 2 of the Regulation. Generally, it is 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. Contribution account may also include an account of a self-employed person in New Scheme which is mainly used to receive MPF contributions made by himself while self-employed.「供款帳戶」—與《規例》第 2 條所載的供款帳戶具有相同含義。一般是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。供款帳戶亦包括自僱人士在新計劃下主要用以接收其在自僱期間所作出的強積金供款的帳戶。

(b) "Personal account" – has the same meaning as in section 2 of the Regulation. Generally, it is an account (other than a contribution account) in an MPF scheme which is mainly used to receive the accrued benefits transferred from other account(s).「個人帳戶」—與《規例》第 2 條所載的個人帳戶具有相同含義。一般是指強積金計劃下主要用以接收由另一帳戶轉入的累算權益的帳戶（不包括供款帳戶）。

(c) "Original Scheme" – the MPF scheme from which your accrued benefits are to be transferred.「原計劃」—指轉出你的累算權益的強積金計劃。

(d) "New Scheme" – the MPF scheme to which your accrued benefits are to be transferred. If you elect to transfer your accrued benefits to another account within the same MPF scheme, New Scheme on this Form will be the same as Original Scheme.「新計劃」—指轉入你的累算權益的強積金計劃。如你選擇把累算權益轉移至同一強積金計劃內的另一個帳戶，則本表格所述的新計劃將與原計劃相同。

(e) "Calendar year" – the one-year period from 1 January to 31 December.「公曆年」—指由 1 月 1 日至 12 月 31 日的一年期間。

<u>Rights of employees under the Employee Choice Arrangement ("ECA") 僱員在「僱員自選安排」下可享的權利</u>

(1) Under the ECA, an employee can, **during employment**, make an election to transfer part of the accrued benefits from a contribution account in Original Scheme to an account in New Scheme nominated by him. 在「僱員自選安排」下，僱員可在**受僱期間**，選擇把原計劃供款帳戶內的部分累算權益轉移至其自選新計劃的帳戶。

(2) The table below shows the parts of accrued benefits derived from the mandatory contributions in a contribution account and the transferability of these parts of accrued benefits in a contribution account under the ECA. 下表載列供款帳戶內由強制性供款所產生的各部分累算權益，以及這些累算權益在「僱員自選安排」下可作轉移的情況：

Parts of accrued benefits in a contribution account **供款帳戶內的各部分累算權益**		**Under ECA** **在「僱員自選安排」下** **累算權益可作轉移的情況**
(a)	Employer mandatory contributions in current employment 現職期間的僱主強制性供款	Not transferable 不可轉移
(b)	Employee mandatory contributions in current employment 現職期間的僱員強制性供款	Transferable to an MPF personal account **once per calendar year**[1] 可**每公曆年一次**[1]轉出至強積金個人帳戶
(c)	Mandatory contributions that have been transferred into the contribution account and are attributable to former employment(s) 以往工作所累積並已轉移至供款帳戶的強制性供款	Transferable to an MPF personal account or contribution account anytime 可隨時轉出至強積金個人帳戶或供款帳戶

(3) The transferability of accrued benefits derived from voluntary contributions is subject to the governing rules of Original Scheme. Please check this information from the offering documents of Original Scheme, which can be found on the website of the approved trustee of Original Scheme. You may also consult your employer or contact the approved trustee of Original Scheme. 至於自願性供款所產生的累算權益是否可作轉移，則視乎原計劃的管限規則而定。有關規則的詳情，請查閱原計劃的要約文件。該文件可於原計劃核准受託人的網站下載，你也可向僱主或原計劃的的核准受託人查詢詳情。

(4) You can only elect to transfer out the accrued benefits derived from your employee mandatory contributions once per calendar year (unless the governing rules of Original Scheme provide for more frequent transfer-out). **The date the approved trustee of New Scheme receives the completed election form is adopted for counting that quota.** You may check that date from the transfer statement issued by your approved trustee of Original Scheme, or consult your approved trustee of Original Scheme directly. 你在每個公曆年內只可選擇轉出僱員強制性供款所產生的累算權益一次（如原計劃的管限規則訂明可多次轉出權益，則不在此限）。**新計劃的核准受託人收到已填妥的轉移選擇表格的日期將用作計算轉移次數有否超出限額。**你可於原計劃的核准受託人向你發出的轉移結算書上查閱該日期，或直接向原計劃的核准受託人查詢。

(5) Please note that the accrued benefits derived from your employee mandatory contributions in current employment and employee voluntary contributions in current employment (if any) can be transferred to **a personal account** only. They cannot be transferred to another contribution account (Note: if you are concurrently working for more than one employer, you would have other contribution accounts). 請注意，你在現職期間所作出的僱員強制性供款及僱員自願性供款（如有）所產生的累算權益只可轉移至**個人帳戶**，不可轉移至其他供款帳戶（註：如你同時從事多於一份受僱工作，則會持有其他供款帳戶）。

(6) After your accrued benefits are transferred out from Original Scheme, future contributions made by your existing employer (both employer and employee portions) will continue to be made to your contribution account with the approved trustee of Original Scheme. If you want to transfer the benefits derived from the subsequent employee mandatory contributions to your account in New Scheme, you should make a separate transfer election in the next calendar year (or earlier if the governing rules of Original Scheme allow for more frequent transfer-out in a calendar year). 從原計劃轉出你的累算權益後，現職僱主日後為你作出的供款（包括僱主及僱員部分），將繼續由核准受託人分配至你在原計劃的供款帳戶。如你日後想把該等僱員強制性供款所產生的累算權益轉移至你在新計劃的帳戶，便須在下一個公曆年另行作出轉移選擇（如原計劃的管限規則訂明可在同一公曆年內多次轉出權益，則可提前在同一公曆年內選擇轉出權益）。

[1] Unless the governing rules of Original Scheme provide for more frequent transfer-out.
[1]如原計劃的管限規則訂明可多次轉移權益，則不在此限。

Reminders before making an election to transfer 選擇作出轉移前的注意事項

(7) Before you decide to transfer your accrued benefits to another scheme, you should take into consideration the following factors: 在你決定把累算權益轉移至另一計劃前，你應考慮以下因素：

(a) services of the approved trustees (e.g. frequency of issuance of benefit statement to scheme members; number of free fund switching per year); 核准受託人的服務（例如向計劃成員發出權益報表的頻密程度及每年可免費轉換基金的次數）；

(b) fees and charges of the funds (for detailed information, please refer to the Fee Comparative Platform on the website of the MPFA or the Summary of Fee Comparative Platform on MPF Funds which can be obtained from the offices of the MPFA free of charge); 基金的收費（詳情請參閱積金局網站的收費比較平台，或可於積金局各辦事處免費索取《強積金基金收費比較平台摘要》）；

(c) the range of fund choices offered by the schemes and in particular whether there are funds available that match what you need; and 計劃所提供的基金選擇範圍，尤須注意計劃有否提供切合你需要的基金選擇；及

(d) if you are currently investing in an MPF guaranteed fund, a transfer of the accrued 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 Original Scheme or consult the approved trustee of Original Scheme for details. 如你現時投資於強積金保證基金，則從該保證基金轉出累算權益可能導致你不符合部分或所有保證條件，從而影響你享有保證的資格。有關詳情請查閱原計劃的要約文件或向原計劃的核准受託人查詢。

(8) Before deciding to transfer benefits to New Scheme, you should try to understand as much as you can about New Scheme. Please check the information about New Scheme from the offering document of New Scheme, which can be found on the website of the approved trustee of New Scheme or contact the approved trustee of New Scheme. 在決定把權益轉移至新計劃前，你應盡量瞭解新計劃的內容。有關新計劃的詳情，請查閱新計劃的要約文件。該文件可於新計劃的核准受託人的網站下載，你也可聯絡新計劃的核准受託人查詢詳情。

(9) Please ensure that you have an MPF account in New Scheme. Otherwise, you have to submit a membership enrolment form before or at the same time you submit this Form to the approved trustee of New Scheme. Please consult your approved trustee of New Scheme for the procedures and required documents for setting up an account. 請確保你在新計劃下已持有強積金帳戶。否則，你在提交本表格之時或在此之前，須先行向新計劃的核准受託人提交成員參加計劃表格。有關開立帳戶的程序及所需文件，請向新計劃的核准受託人查詢。

(10) If you wish to transfer your accrued benefits from an 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 the approved trustee of New scheme or (b) have given investment instructions for the account to invest accrued benefits according to the DIS. Please approach the approved trustee of New Scheme to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in New Scheme, please also approach the approved trustee of New Scheme. 如欲把累算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新計劃的核准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，要求把累算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，請向新計劃的核准受託人查詢詳情。如欲就新計劃的帳戶更改或給予投資指示，亦請聯絡新計劃的核准受託人。

(11) If you have reached, or are approaching, the age of 50 and your accrued 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 approved 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 approved trustee(s) if you wish to know the details of how the approved trustee(s) will handle these transactions. 如你已年滿或快將年滿 50 歲，而現時你的累算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。如計劃的核准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，該計劃的核准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，請向相關核准受託人查詢詳情。

(12) In order to prevent a third party from filling in incorrect information, please **DO NOT sign on a blank form.** After the completed election form has been received by the approved trustee of New Scheme, the administration procedures taken by the approved 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**。在新計劃的核准受託人收到已填妥的選擇表格後，之前由核准受託人採取的行政步驟未必能夠撤銷。

(13) The number of fund units shown in your current MPF account on the date you elect to transfer may be different from that as of the date on which the fund units are redeemed. The approved trustee of Original Scheme will redeem all the fund units from the part(s) of accrued benefits in your MPF account that you elect to transfer out on the date of redemption and transfer out the redeemed benefits. The approved trustee of New Scheme will subscribe fund units in accordance with your instructions. There will be a time-lag of about one to two weeks, during which your MPF benefits will not be invested in any fund. During this period, fund prices may change due to market fluctuations, and there is a risk of a "sell low, buy high" scenario occurring. 在你作出轉移選擇當日，你現有強積金帳戶顯示的基金單位數目，或會與贖回基金單位當日的數目有所不同。原計劃的核准受託人將在贖回日贖回你選擇從強積金帳戶轉出的各部分累算權益的所有基金單位，以及轉出贖回權益。新計劃的核准受託人會按照你的指示買入基金單位，過程中會出現一至兩個星期的「投資空檔」。在此期間，你的強積金權益不會投資於任何基金，假若這時基金價格因市場波動而出現變化，有機會出現「低賣高買」的風險。

(14) Please refer to the MPFA's publication 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，請參閱積金局網站（www.mpfa.org.hk）的相關宣傳刊物。

Enquiries 查詢

(15) Information about an MPF 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 accrued benefits to that scheme. Please contact the relevant approved trustees for enquiries about account details and information on specific MPF schemes or funds. 強積金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累算權益轉移至該計劃。如欲查詢你的帳戶詳情及個別強積金計劃或基金的資料，請聯絡有關計劃的核准受託人。

(16) For general enquiries regarding the ECA, you may contact the relevant approved trustees or the MPFA (email: mpfa@mpfa.org.hk or MPFA hotline: 2918 0102). 有關「僱員自選安排」的一般查詢，可聯絡有關計劃的核准受託人或積金局（電郵地址：mpfa@mpfa.org.hk 或積金局熱線電話：2918 0102）。