

Sun Life MPF App

Guide for Members

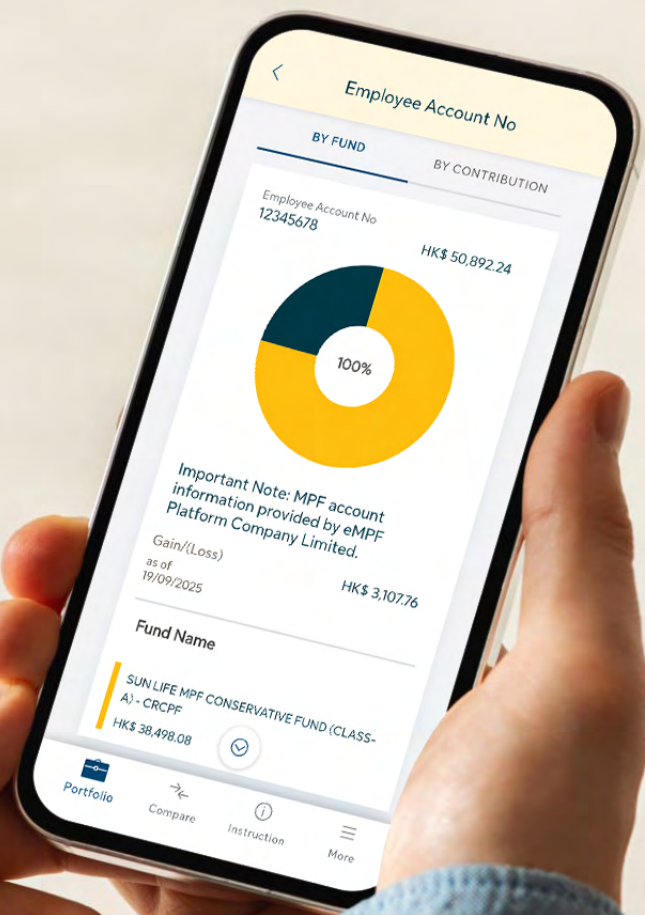


Getting Started

Whenever and wherever,
always be there for you

Sun Life MPF

Welcome to Sun Life MPF! Want to enjoy hassle-free MPF account management? Our Sun Life MPF app partners with you to make your MPF experience quick and convenient. Follow this step-by-step guide to see just how simple it is.



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1 Download the App



1. Scan the above QR code or search for "Sun Life MPF" in App Store.
2. Download the app.
3. Open Sun Life MPF app after the download is completed.



1. Scan the above QR code or search for "Sun Life MPF" in Google Play Store.
2. Download the app.
3. Open Sun Life MPF app after the download is completed.



Tips: You're ready to go! Explore more of the features of Sun Life MPF app below.



Remarks: If you are in Canada, the U.S. or European Union countries and unable to download the app, you can still view account details via [Online Pension Services Centre](#).


1. Once the download is completed, you can **register and log in** to your account right away.



2 One-Time Verification

For first time users or existing users who have not completed one-time verification, please follow the steps below to complete it. If you have already completed the verification at [Online Pension Services Centre](#), please log in directly.

1



Existing & New Member

If you have not registered, please complete a one-time verification to enjoy online services. If you have previously registered, you can continue to use your existing username and password to log in.

One-time verification

Verified your account already?

Log in

[Steps for Verification and Login \(pdf version\)](#)

[Forgot Username or password](#)

2

Welcome!

✓ Finding your record

HKID/Passport Number
●●●●●●

Date of birth (dd/mm/yyyy)
08/08/1988

How would you like to receive One-time password (OTP)?

SMS Email

If you don't have Hong Kong Mobile Number, then you can receive OTP via Email.


abc@email.com

I have read and understood how I will get the One-time password.

Cancel

Next

1. Select **"One-Time Verification"** at the login page.
2. Input your **HKID/passport number** and **date of birth** with your **registered mobile no./e-mail** for receiving One-time password (OTP) → Select **Next**.

 **Remarks:** Your registered mobile no. or email must be the same as your record on the eMPF Platform, otherwise you are not able to register the online service. If you have just finished eMPF registration or recently updated your registered mobile no./email on the eMPF Platform, please allow **at least 48 hours** for system data synchronization. Afterwards, you can proceed with the one-time verification.

3

✓ Finding your record

✓ An extra step for security

Your One-time password (OTP) has been sent to: a*****m

It will expire after 5 minutes upon request.

Please enter the 6-digit OTP

●●●●●●

Didn't receive OTP? [Resend OTP](#)

Cancel

Next

> Create your online account

4

✓ An extra step for security

✓ Create your online account

Create your Username

abc1234

Username can be used at login

Create Password

●●●●●●

Hint


Confirm Password

●●●●●●


Cancel

Submit

3. You will receive your **One-time password (OTP)** via SMS/e-mail. Enter the **6-digit OTP** → Select **Next**.

 **Remarks:** To secure your personal information, the OTP will expire after 5 minutes upon request. Please select **"Resend OTP"** if necessary.

4. Create your **username and password** → **Confirm password** → Select **Submit**.

 **Tips:** You can read the **"Hint"** for the requirements of setting a new username or password.

Congratulations! Your registration has completed.

3 Login and Logout

Almost there! Once you have finished the one-time verification, you'll be on the way to enjoy our mobile services.

Login

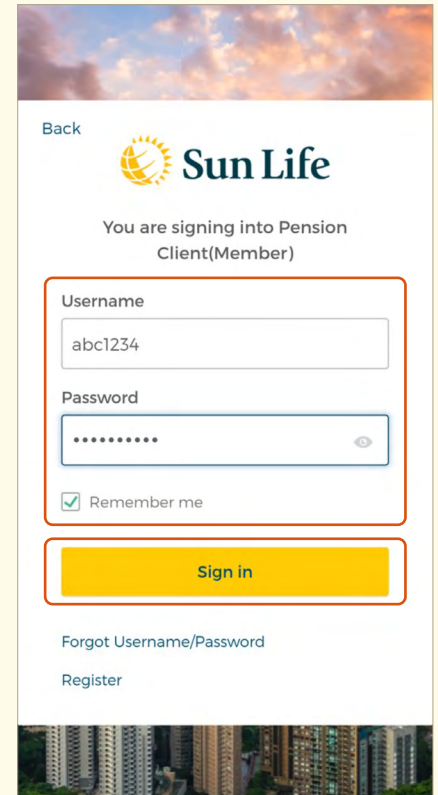
1. Open **Sun Life MPF** app and select **"Log in"**.
2. Input your **username** and **password**.
3. Check the **"Remember Me"** box if you want to keep your login details in your device for simpler and faster future login.
4. Select **Sign in**, that's it!




Remarks: If you have forgotten your username or password, you can select **"Forgot Username/Password"** to retrieve your username or reset your password.



Tips: You can use Face ID / Touch ID or biometric authentication to log in if you have already turned on the feature.

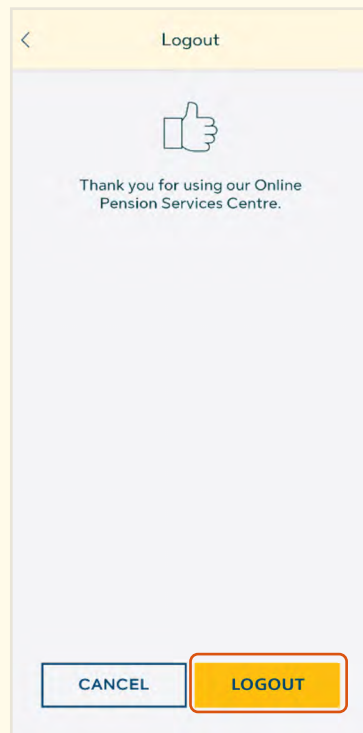
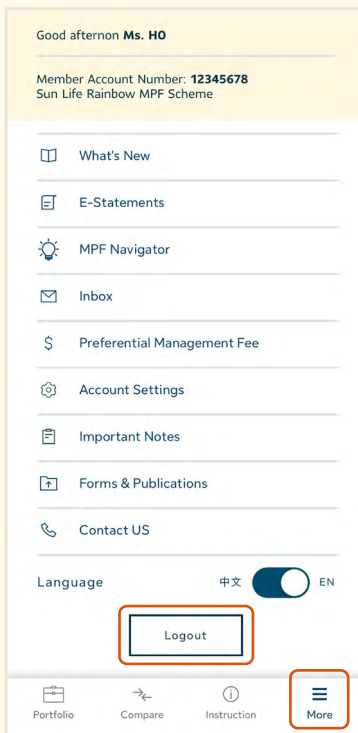


Logout

1. In the navigation bar at the bottom, select **"More"**.
 2. Scroll down and select **Logout**.
-  **Tips:** Log out when you've finished - especially in case of a shared device!
3. Select **LOGOUT** if you are sure to log out.

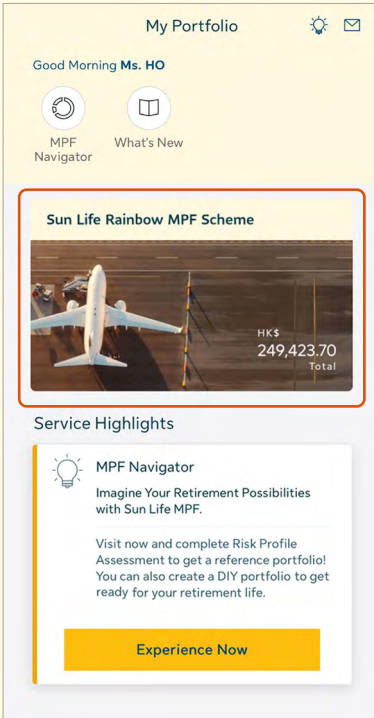


Remarks: To protect your account information, you will be automatically signed out after being idled for 15 minutes.



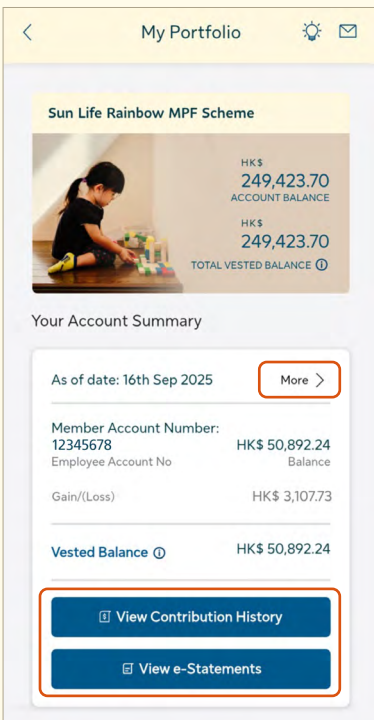
4 My Account Information

Let's take a deeper look into the functions of Sun Life MPF app! Here you can check your account balance, gain/ (loss), MPF account portfolio and account details.



1. After logging in, you will be directly taken to the **My Portfolio** page.

2. **Tap on the scheme** to view account summary.



3. If you have more than one account, you can **view the information of all accounts** here.

4. Tap on **"More >"** to view account details.



Tips: You may have more than one MPF account under **Sun Life Rainbow MPF Scheme**. You can view your overall portfolio under the scheme at a glance. You can also select **View Contribution History** or **View e-Statements** under each account to quickly enter the page!

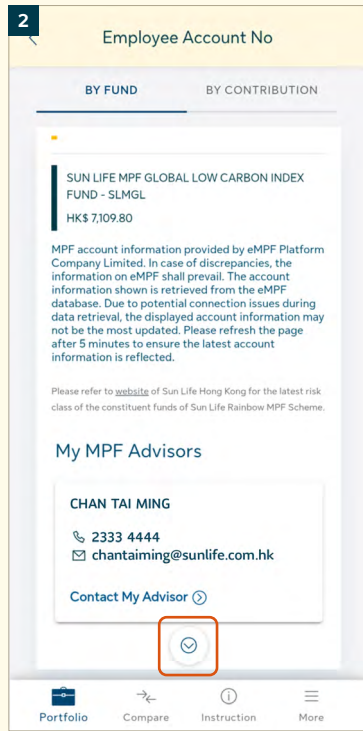
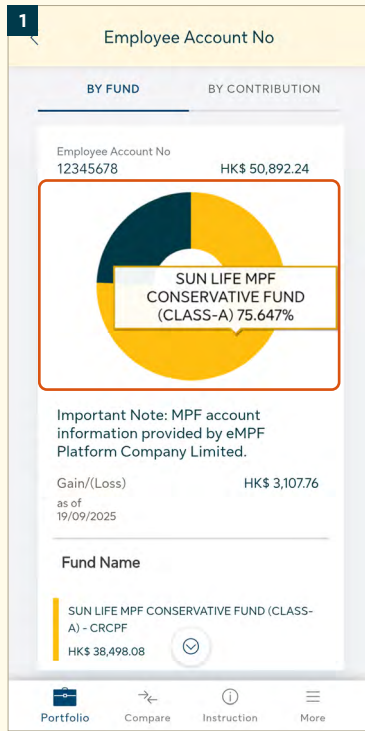



Tips: You can always go back to this page by selecting **Portfolio** in the navigation bar at the bottom.



Tips: You can view details of your MPF account **by fund** or **by contribution** here, including fund price, asset balance by contribution types, asset allocation and balance by constituent fund, etc.

View Account Details by Fund



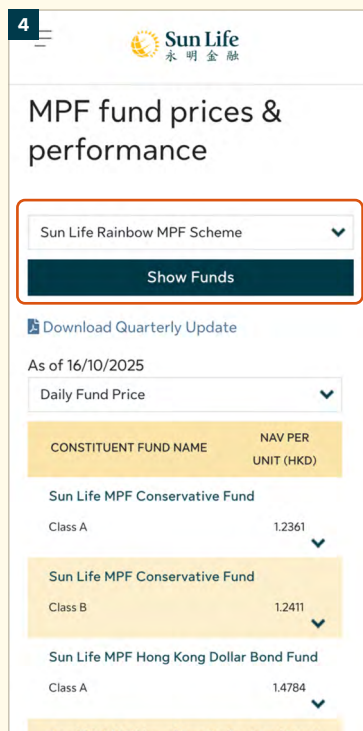
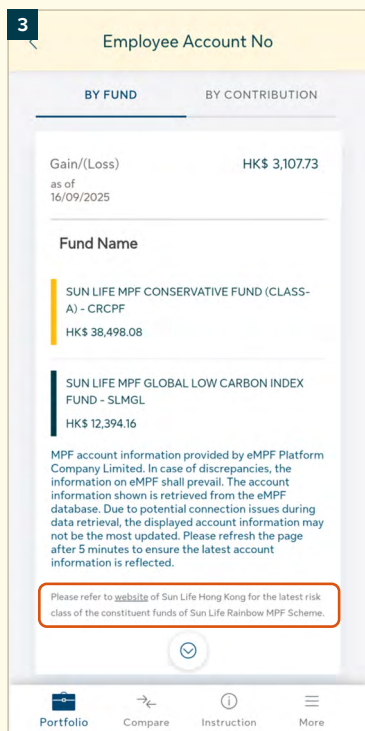
1. Tap on the pie to view **fund allocation percentage**.
2. Tap on the  to scroll down to view more constituent fund holdings (if applicable).



Tips: you can find the details of the **MPF advisor** responsible for this account at the bottom of this page (if applicable). For details, please refer to page 13 of the guide.

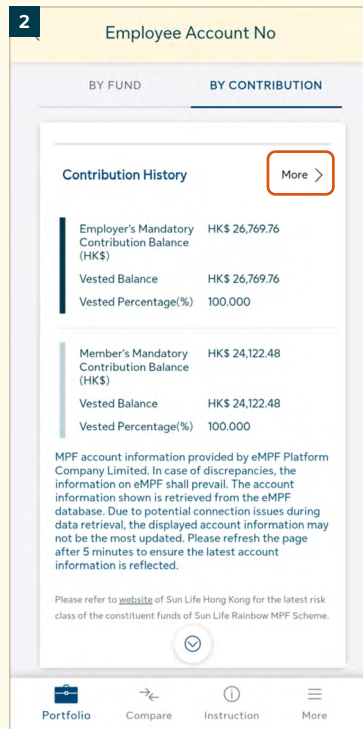
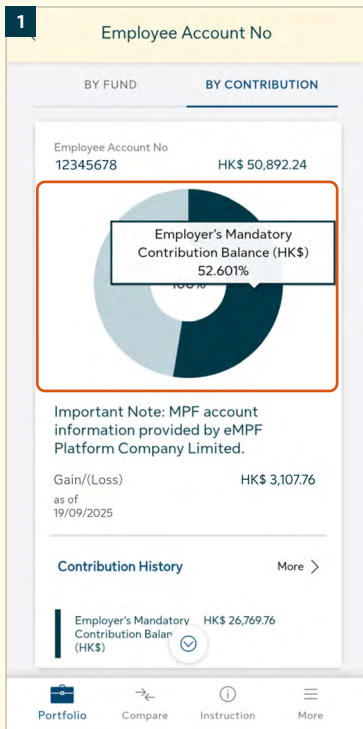


Important: All data are provided by the eMPF Platform and may not reflect real-time data.



3. You can tap on **"website"** to be directed to the MPF Fund Prices & Performance page on Sun Life Hong Kong's website.
4. Select **"Sun Life Rainbow MPF Scheme"** → Select **"Show Funds"** to see fund details.

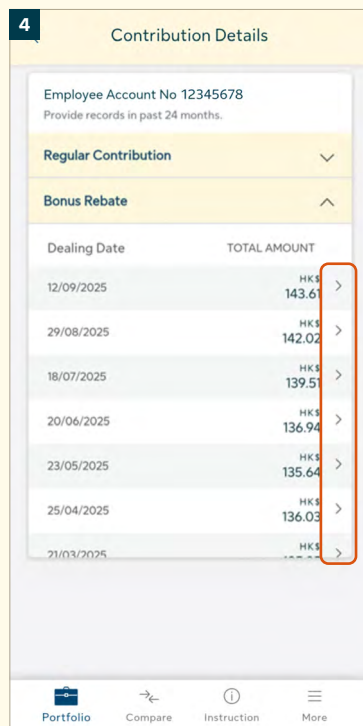
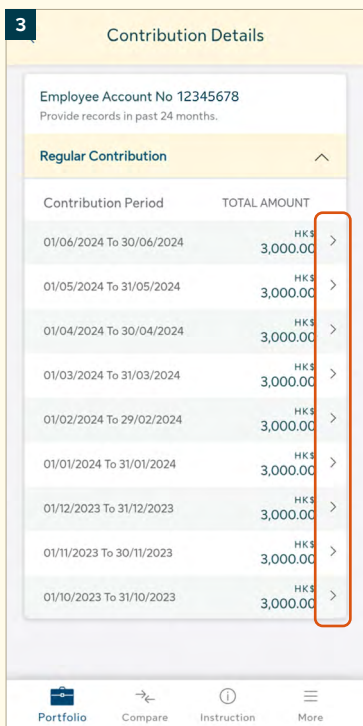
View Account Details by Contribution



1. Tap on the pie to view **fund allocation percentage**.
2. Tap on **"More >"** to view **contribution history details**.



Important: All data are provided by the eMPF Platform and may not reflect real-time data.



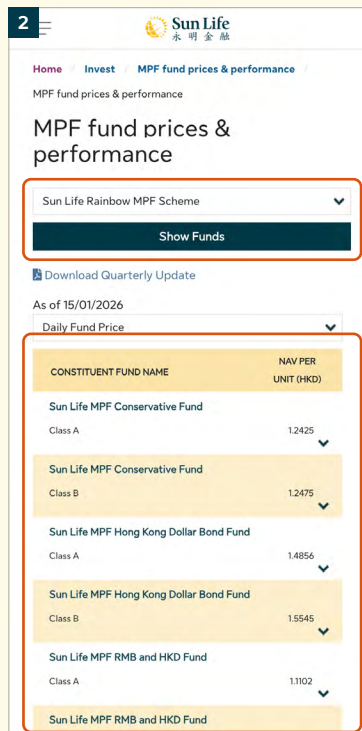
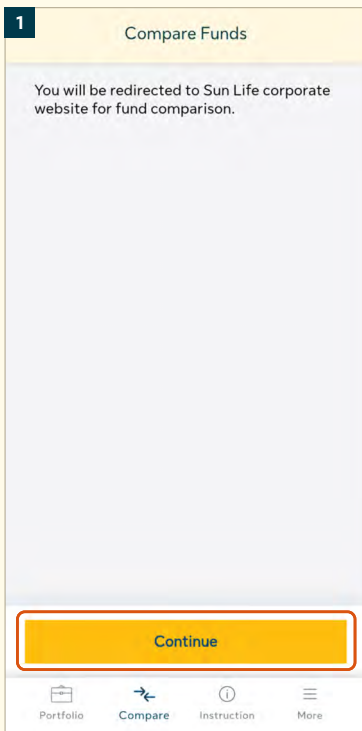
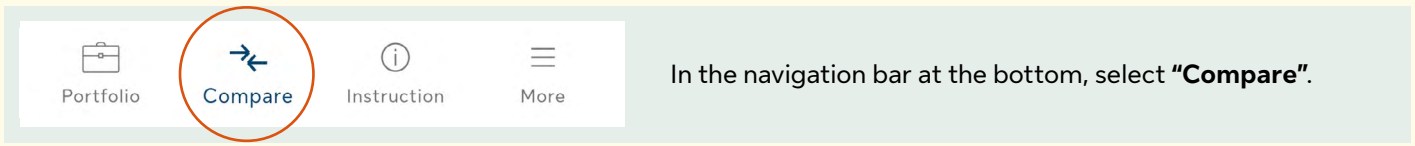
3. Tap on **">"** to view the details of each of your **regular contribution history**.
4. In addition to regular contribution, you can also view your **bonus rebate distribution history** (if applicable) here ➔ Tap on **">"** to view more details.



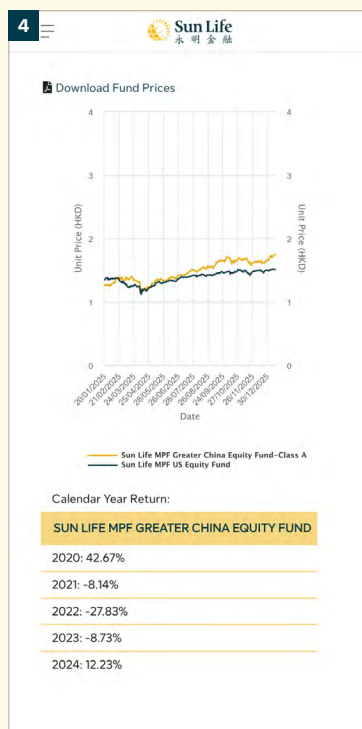
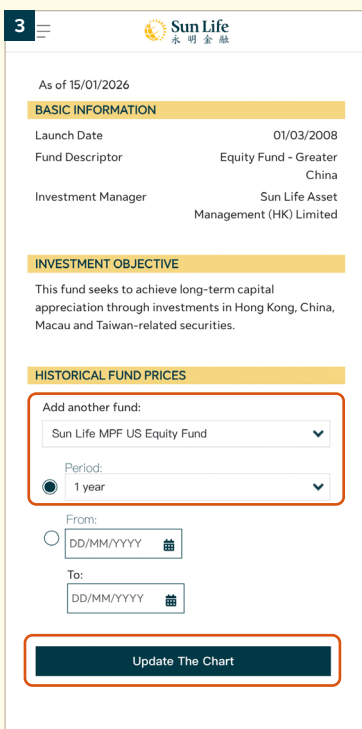
Tips: Here you can view your transaction history, e.g. regular contribution and bonus rebate released (if applicable), in the **past 24 months** to clearly keep track of what transaction you have done.

5 Compare Funds

The Compare Funds function helps you to get a quick look on comparison of the constituent fund performance.



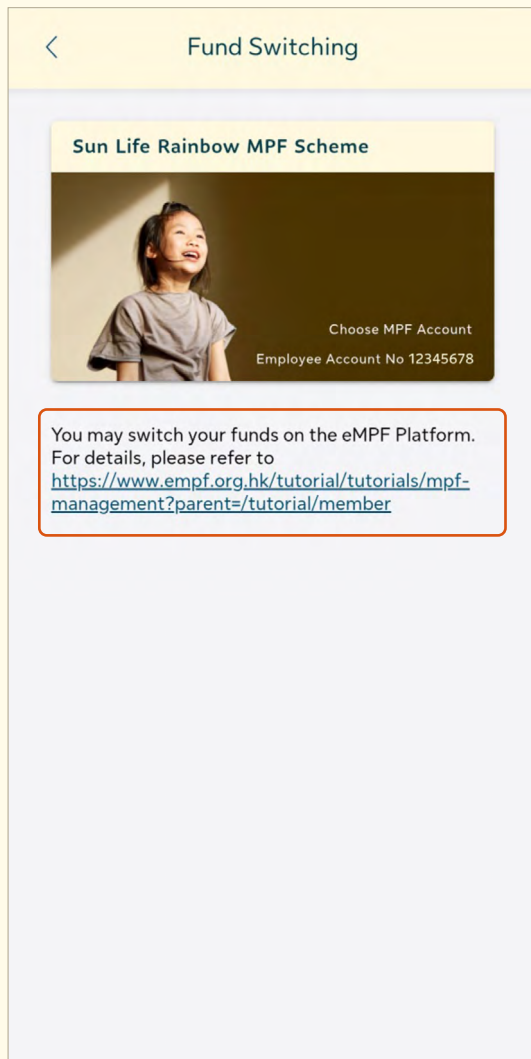
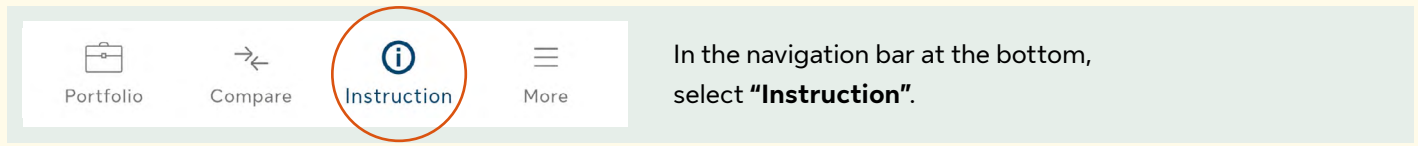
1. Select **Continue** → You will be redirected to Sun Life Hong Kong's website for **fund comparison**.
2. Select "Sun Life Rainbow MPF Scheme" → Select **Show Funds** → Then select the fund you want to view.



3. In the drop-down menu, select the other fund you want to compare → Select the period → Then select **Update The Chart**.
4. You can then use the chart for fund price comparison.

6 Investment Instruction (Submit through eMPF Platform)

If you need to change your investment, you should submit investment instructions through the eMPF Platform.



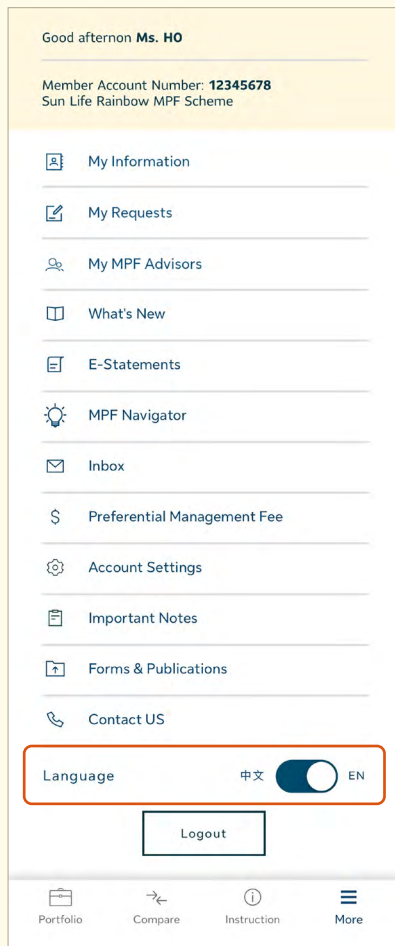
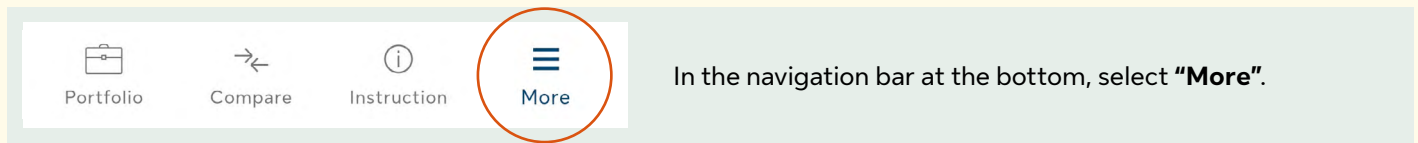
1. Select the investment instructions you would like to make ➔ Tap on the link on the page to view the tutorial provided by the eMPF Platform.



Tips: You may also [visit here](#) to view the tutorial for MPF investments provided by the eMPF Platform.

7 More

Can't wait to explore Sun Life MPF app? At the More function, we have integrated with more functions fitting in your need.



1. You will be taken to the **"More dashboard"**.

2. Here you can see:

- a My Information**
- b My Requests**
- c My MPF Advisors (If applicable)**
- d What's New**
- e E-Statements**
- f MPF Navigator**
- g Inbox**
- h Preferential Management Fee (If applicable)**
- i Account Settings**
- j Important Notes**
- k Forms & Publications**
- l Contact US**
- m Language**
- n Logout**

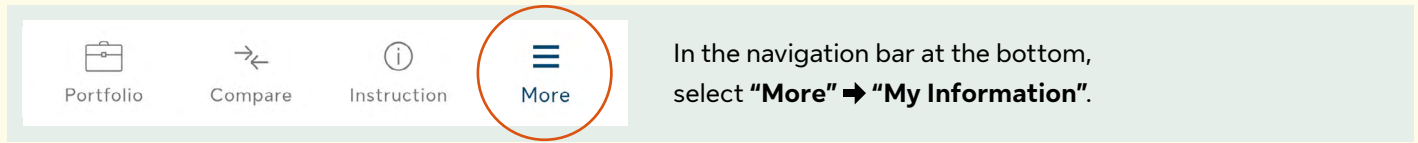
3. Select what you would like to view or manage.



Tips: Here you can switch your language on the app.

7.1 More - My Information

You can view your existing personal information in **My Information**.



< My Information

MPF account information provided by eMPF Platform Company Limited. If you want to update Personal Information, please submit the request to eMPF Platform.

Member Name
HO SIU MAN

Member Account Number:
12345678

Date of Birth
08/08/1988

Account Type
Regular Employee

Nationality
China

Nationality (Other)
-

Employer Account Number / Name
88888888/ABC COMPANY LIMITED

Payroll Group / Name
RC1/ ALL MEMBERS

Date of Employment
05/12/2022

Scroll down ↓

1. Here you will see your **basic information, contact details and employment information**, etc. → Scroll down to view more.



Tips: If you want to update your personal information, please submit the request to the eMPF Platform. You can [visit here](#) to view the tutorial for changing your personal information (except Self-Employed Persons) or [visit here](#) to view the tutorial for Self-Employed Persons.



Remarks: If you have just updated your personal information on the eMPF Platform, please allow **at least 48 hours** for system data synchronization.

< My Information

MPF Account Balance SMS Service
 Select Do Not Select

Personal Information Collection Statement of Sun Life Rainbow MPF Scheme

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

[Read More](#)

Consent on Direct Marketing for Sun Life Hong Kong Limited
No

Note: You may update your Consent on Direct Marketing on the eMPF Platform.

Releasing Member Information to MPF Intermediaries for MPF Servicing Purpose
 Agree Disagree

Submit

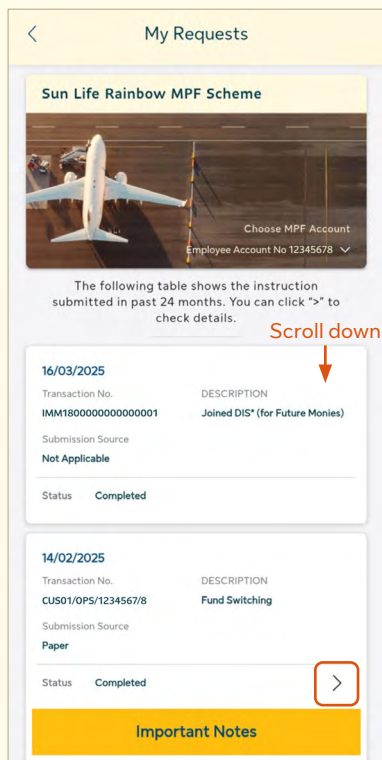
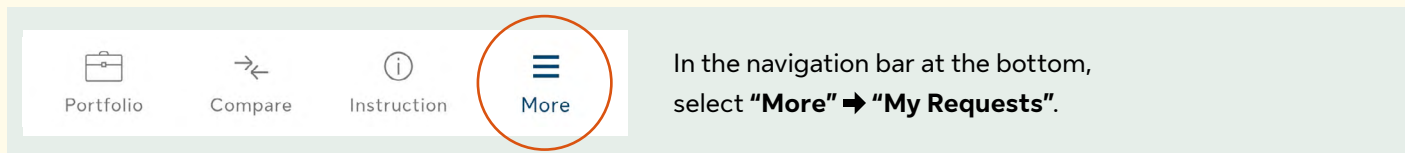
2. You can also change whether you would like to opt in **MPF Account Balances SMS Service** and whether you agree to **release member information to MPF intermediaries for MPF Servicing purpose** → Select **Submit** when finished.



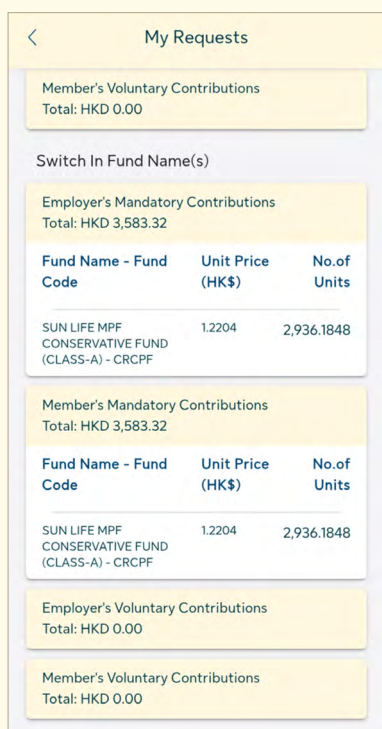
Important: If you wish to receive more comprehensive MPF services, you may select **agree to release member information to MPF intermediaries for MPF servicing purpose**. If you select agree, please read the **Declaration and Authorization** carefully before submitting the instruction.

7.2 More - My Requests

Sun Life MPF app keeps you ahead of your every instruction made within the account via all channels (including web, mobile app and paper form) submitted in the past 24 months.



1. Scroll down to view more.
2. For particular instructions, you can view details by selecting ">".

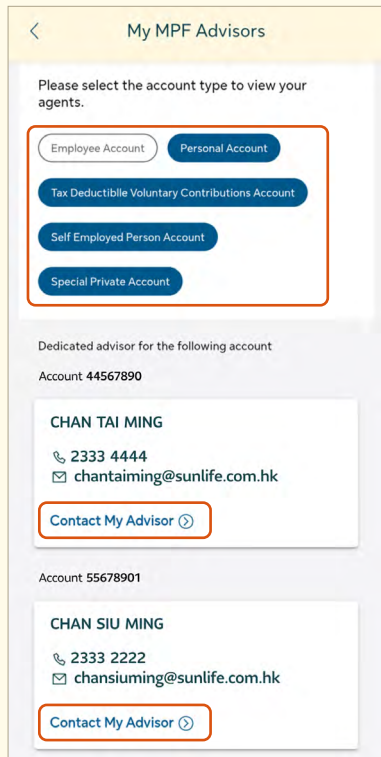
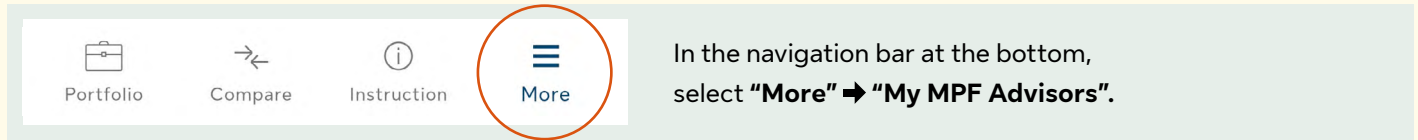


Tips: You can view and monitor the below requests in My Requests:

- Change Username
- Fund Switching
- Change of Investment Mandate
- Joining Default Investment Strategy (DIS)
- Joining Fund Cruiser

7.3 More - My MPF Advisors (If applicable)

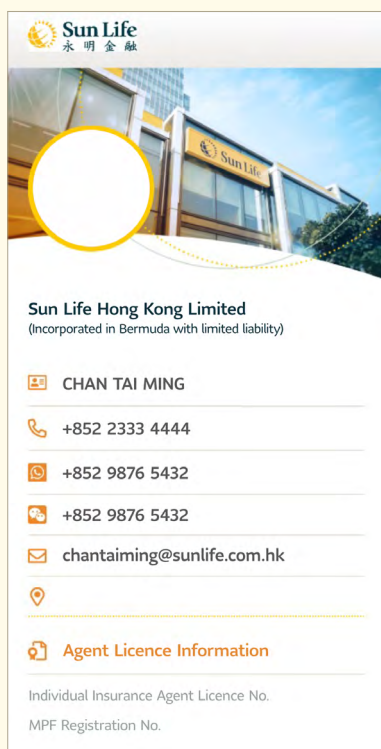
Our professional MPF advisor team is committed to helping you develop an investment portfolio and retirement plan that suit your needs, and plan wisely for your future together!



1. Here you can view the contact number and email address of **your dedicated MPF advisors**.
2. Tap on **"Contact My Advisor"** to see more details on your advisor.



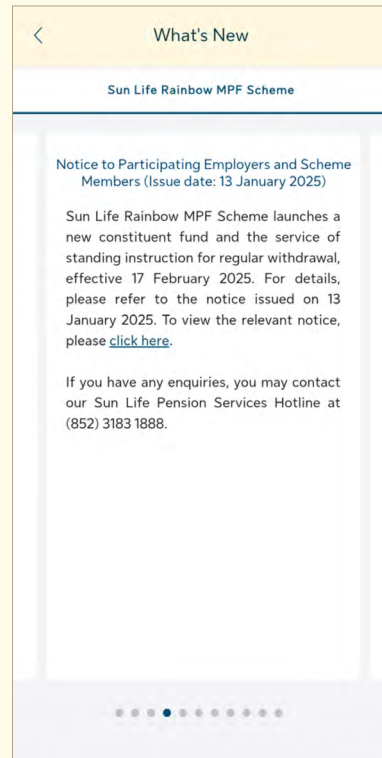
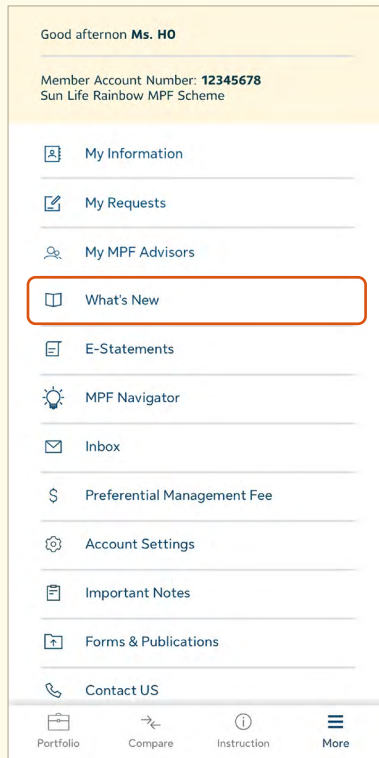
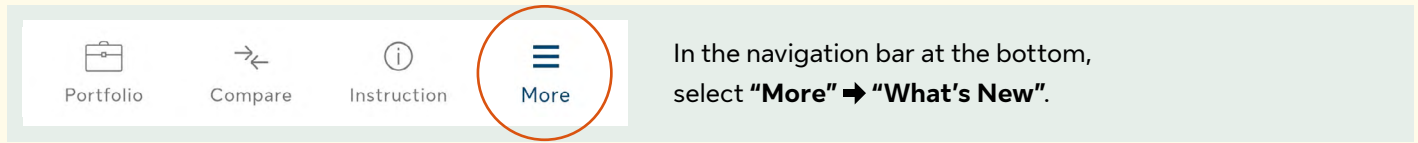
Remarks: This feature is only available for accounts that already have dedicated MPF advisors. We are more than happy to arrange a MPF advisor to follow up on your account, please feel free to contact us.



Tips: If you have more than one account, you may have more than one MPF advisors. You can **select the account type** to view your dedicated MPF advisor.

7.4 More - What's New

Here we will keep you posted on news and any amendments. Keep an eye on our updates!



1. You can also tap **"What's New"** on **"My Portfolio"** page.



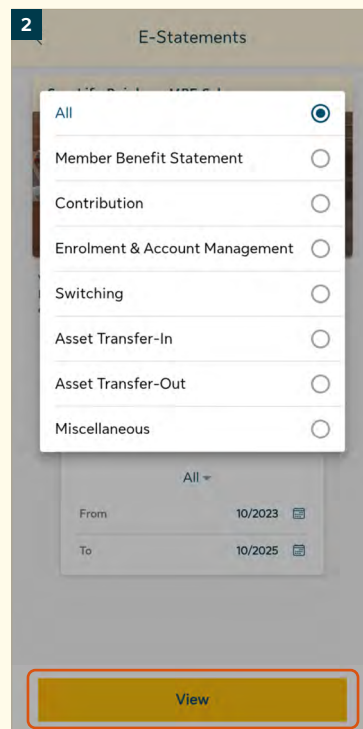
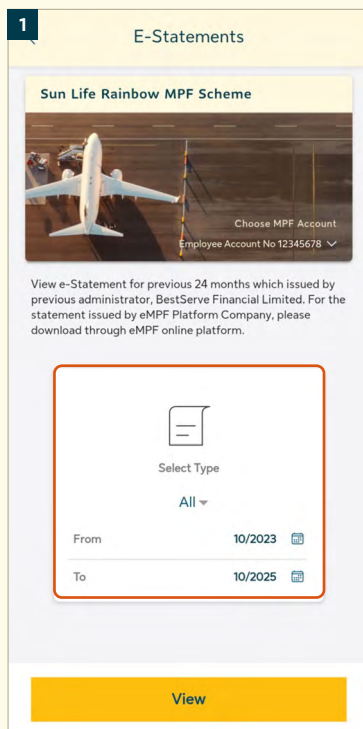
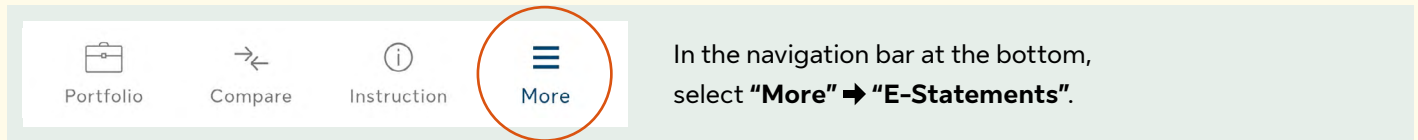
Tips: Scroll left or right to view more messages (if applicable).

7.5 More - E-Statements

You can now instantly view and download your digital statements in the most eco-friendly and convenient way.



Tips: You can also tap on **"View e-Statements"** on **"My Portfolio"**.

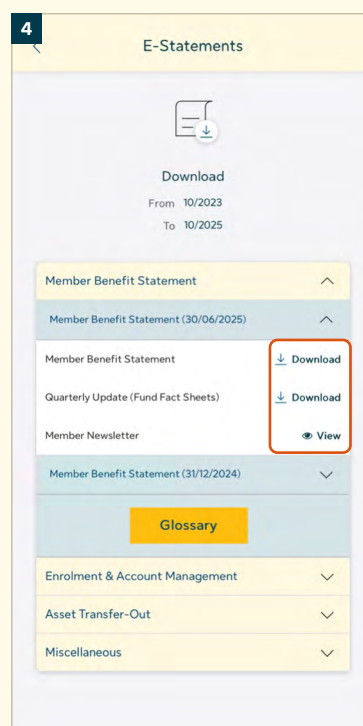
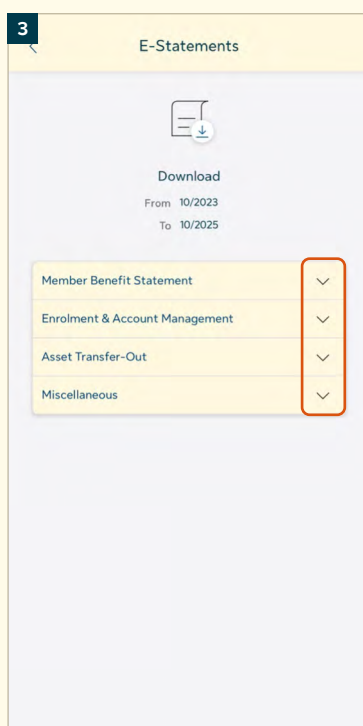


1. Choose the **type and period** of the statement.
2. Select **View**.



Remarks: Do you know what kind of statement you can view here?

- Member Benefit Statement
- Contribution
- Enrolment & Account Management
- Switching
- Asset Transfer-In/Out
- Miscellaneous



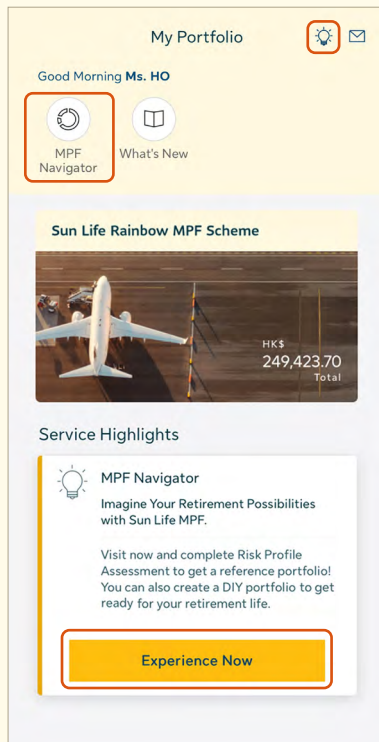
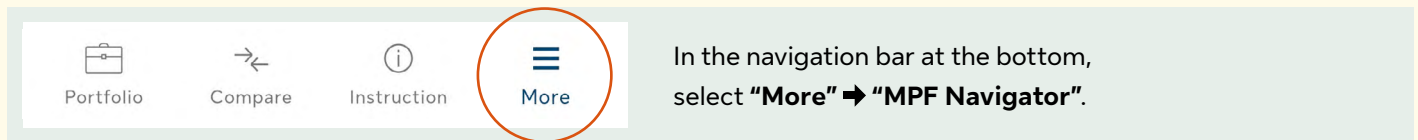
3. Tap on **▼** to view details.
4. You can now **download and view** your **e-statement and letters** sorted by statement type.




Tips: Here you can view your e-Statements for **the previous 24 months issued by the former administrator BestServe Financial Limited**. For statements issued by eMPF Platform Company, please refer to the eMPF Platform for details.

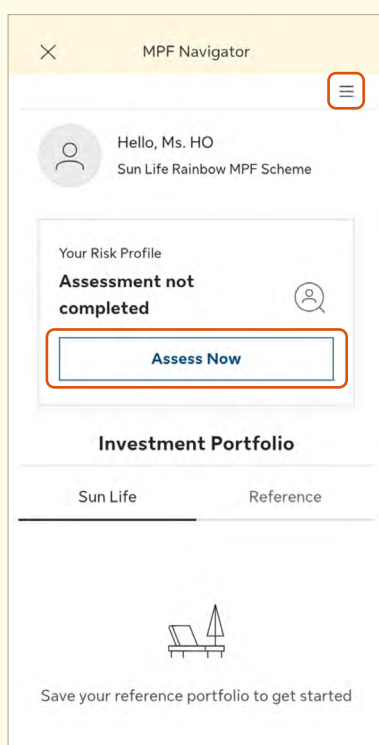
7.6 More - MPF Navigator

Start managing your MPF today! With the comprehensive, personalized and timely solution offered by the MPF Investment Tool **"MPF Navigator"**, we make it simple for you to manage your MPF.





1. You can also tap the MPF Navigator icons on **"My Portfolio"** page or tap **Experience Now** at Service Highlights.
2. Read all the Important Notes, Disclaimer and Term of Use carefully, then select **"Agree and Continue"**.

 **Important:** Read the **"Important Notes"**, **"Disclaimer"** and **"Term of Use"** carefully before entering the **"MPF Navigator"** platform.



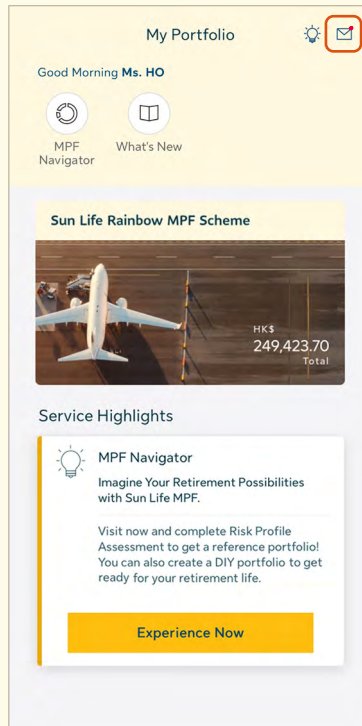
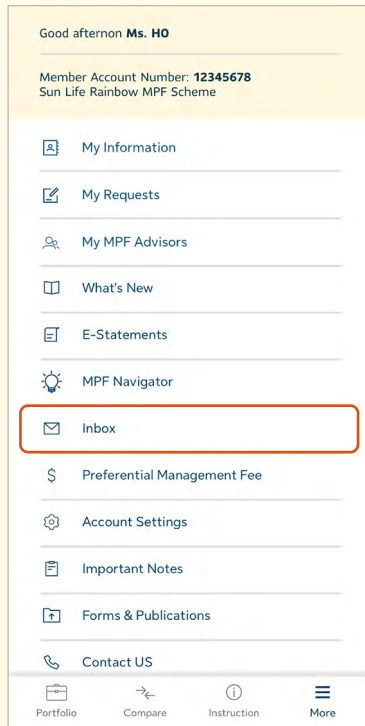
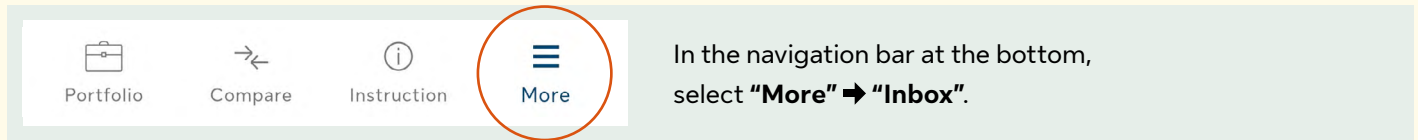
3. You have entered the MPF Navigator platform. Select **"Assess Now"** to start your Risk Profile Assessment and get your Reference Portfolio now.

 **Tips:** Tap on the icon at the top to access every tool you need quickly.

 **Remarks:** "MPF Navigator" (AQUMON platform) and its services are independently operated and provided by Magnum and are not related to Sun Life Hong Kong Limited or its affiliates ("Sun Life"). Any recommended portfolio(s) or information on the AQUMON platform is strictly for reference only. Investment involves risks and past performance is not indicative of future performance. Investment decision should not be solely based on fund performance. Other factors (e.g. fund's investment objective, fees and charges, fund risk level, service level) should also be considered. You should also consult your own independent legal, tax or financial advisor to seek professional advice, where necessary.

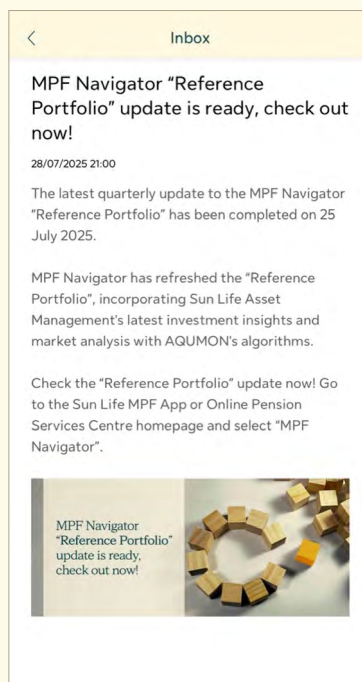
7.7 More - Inbox

You will be updated with all important information through inbox messages, such as our latest offers and monthly fund performance summary, etc.



1. When you receive new messages, a dot will appear on the at the top right on **"My Portfolio"** after logging in → Tap on the icon to view your inbox messages.

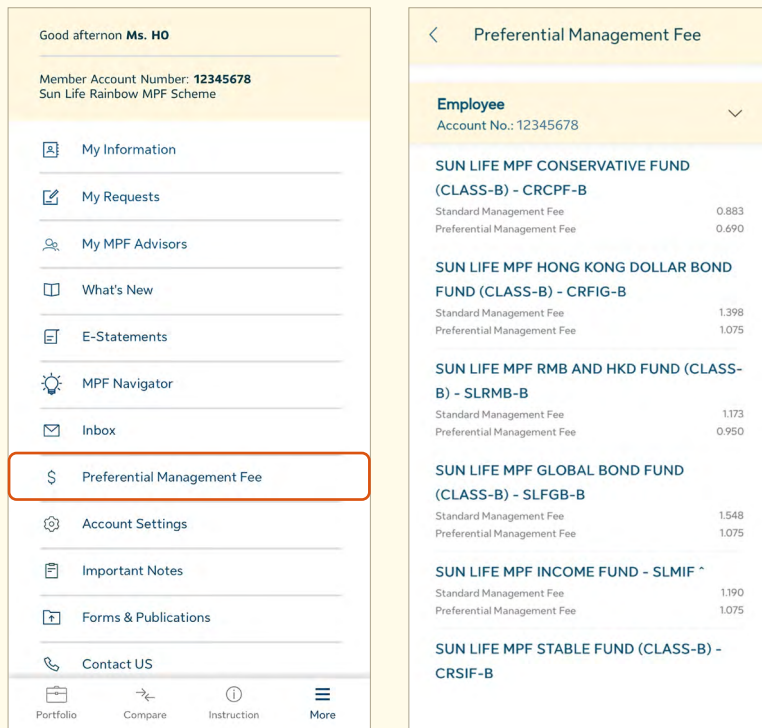
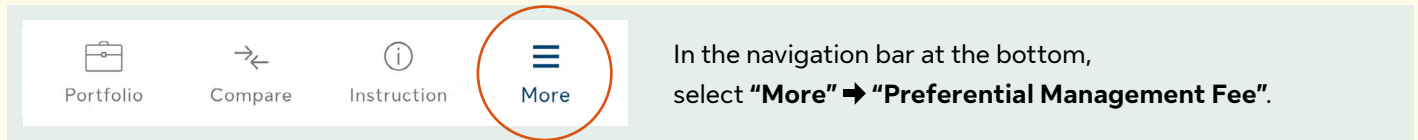
Remarks: The messages in your inbox will only be **stored for two years** and will be automatically removed thereafter.



2. Select the message that you want to view.

7.8 More - Preferential Management Fee (If applicable)

Members enjoying preferential management fee can view all available funds and relevant information here on Sun Life MPF app.



1. If you have more than one MPF account, you can select the account(s) that enjoys the preferential management fee to view details.
2. You will find the **standard management fees** and the **current preferential management fee** for each constituent fund in the list.



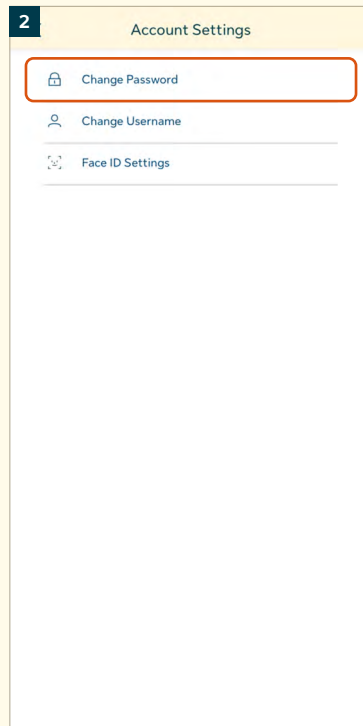
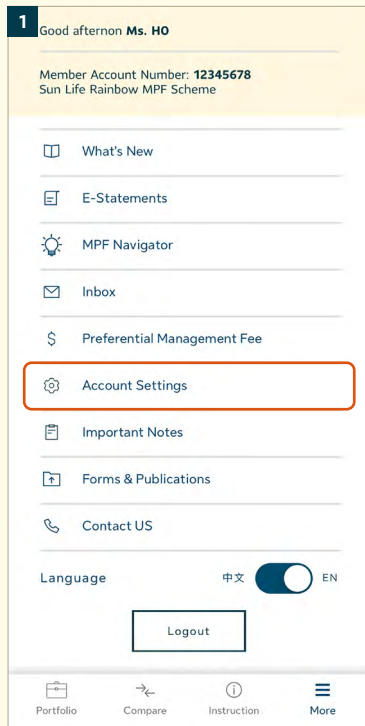
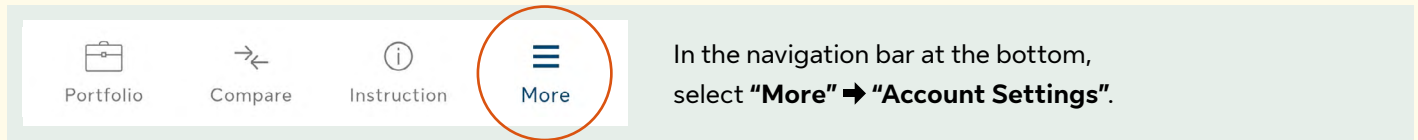
Remarks: Preferential management fee is only applicable to particular members.




Tips: Entitled members can enjoy the preferential management fee through bonus rebate. You can select **"View Contribution History"** on My Portfolio page to view the release history of bonus rebate.

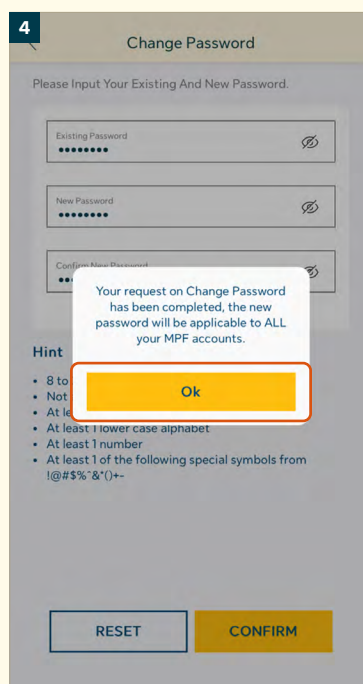
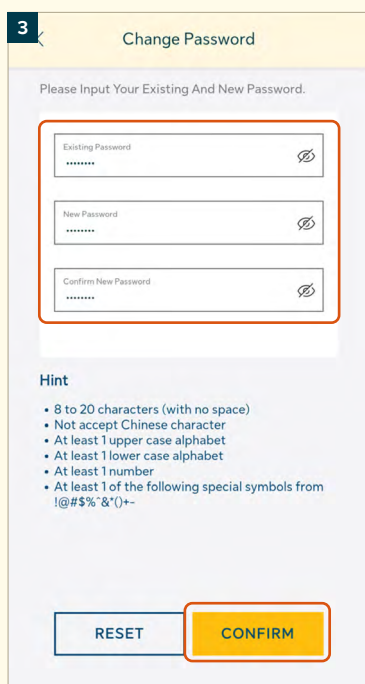
7.9 More - Account Settings


Change Password



1. Select **"Account Settings"**.
2. Select **"Change Password"**.
3. Input your **existing and new password**
Confirm **new password** -> Select **CONFIRM**.
4. Select **OK** to confirm your request on **"Change Password"**.

 **Tips:** If you have enabled Face ID/ Touch ID or Biometric Authentication on your device, you can select **Face ID Settings/Touch ID Settings (for iOS) or Biometric Authentication Settings (for Android)** on this page, to turn on or off the use of this feature to log in to **Sun Life MPF** app.

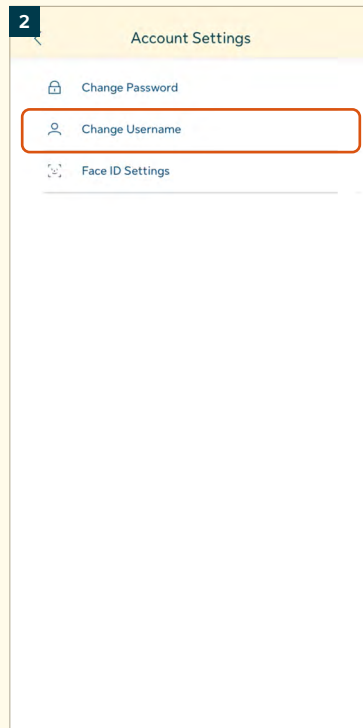
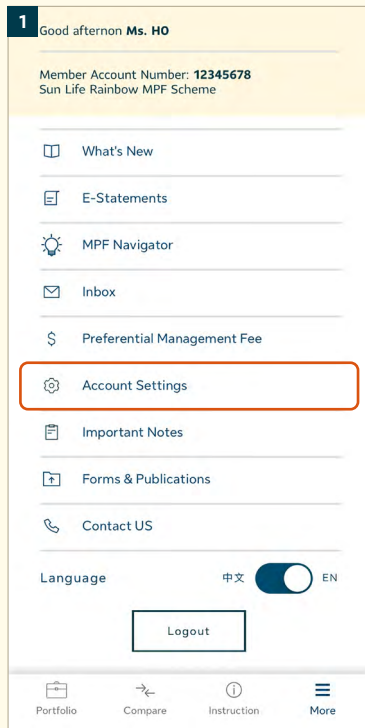
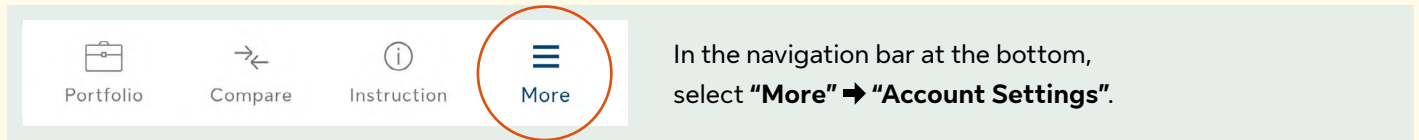


 **Tips:** You can read the **"Hint"** for the requirements of setting a new password.

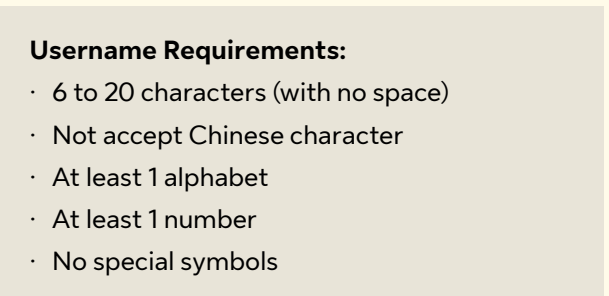
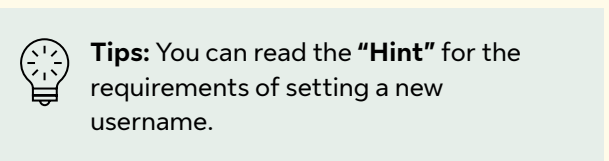
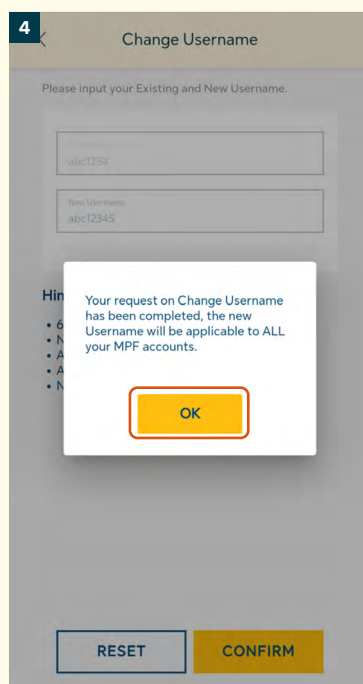
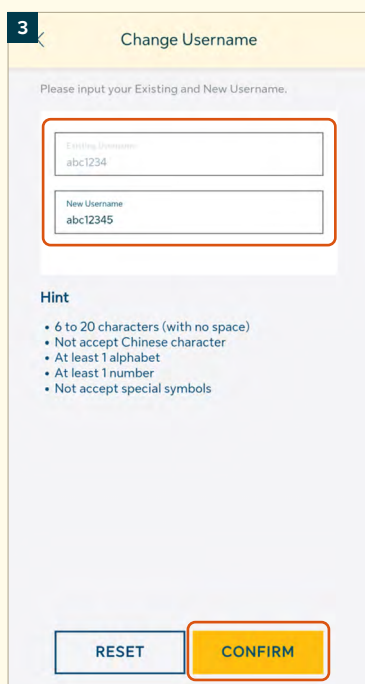
Password Requirements:

- 8 to 20 characters (with no space)
- At least 1 upper case alphabet
- At least 1 lower case alphabet
- Not accept Chinese character
- At least 1 number
- At least 1 of the following special symbols from !@#\$\$%^&*()+-
- Password cannot be too similar to username
- Password cannot contain repeating characters

Change Username

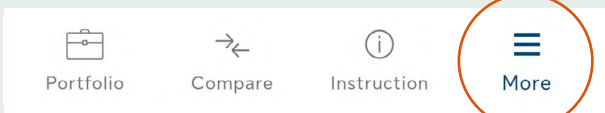


1. Select **"Account Settings"**.
2. Select **"Change Username"**.
3. Input your **new username** → Select **CONFIRM**.
4. Select **OK** to confirm your request on "Change Username".

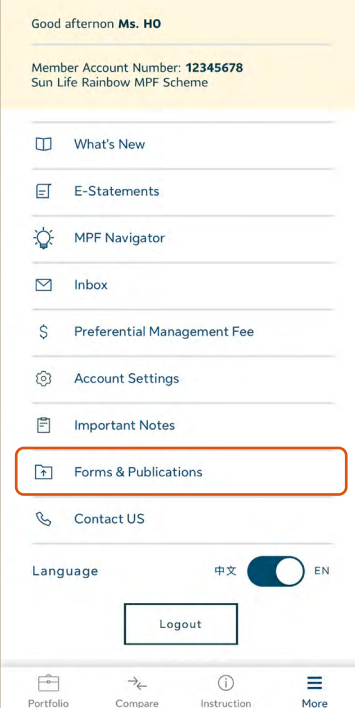


7.10 More - Forms & Publications

Having trouble finding the right forms? Don't worry! All our forms and publications are now just a tap away!



In the navigation bar at the bottom, select **"More"** → **"Forms & Publications"**.



Good afternoon **Ms. HO**

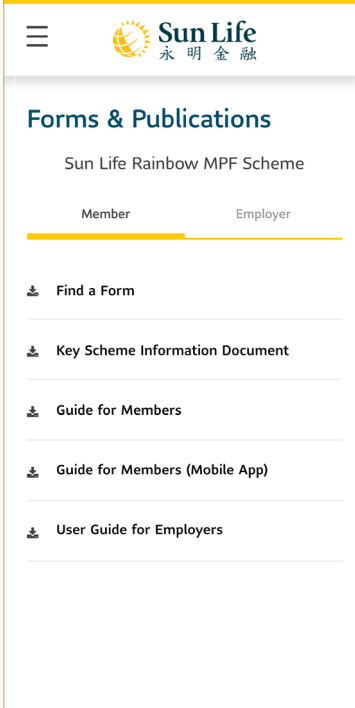
Member Account Number: **12345678**
Sun Life Rainbow MPF Scheme

- What's New
- E-Statements
- MPF Navigator
- Inbox
- Preferential Management Fee
- Account Settings
- Important Notes
- Forms & Publications**
- Contact US

Language: 中文 EN

Logout

Portfolio Compare Instruction More



Sun Life 永明金融

Forms & Publications

Sun Life Rainbow MPF Scheme

Member Employer

- Find a Form
- Key Scheme Information Document
- Guide for Members
- Guide for Members (Mobile App)
- User Guide for Employers

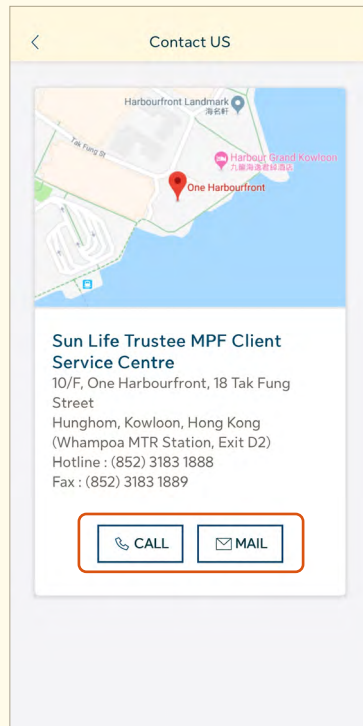
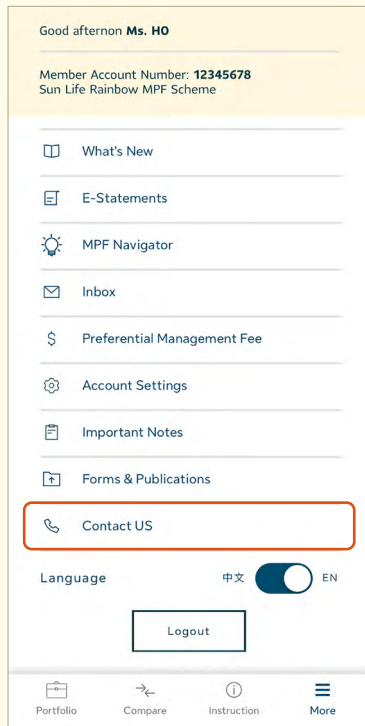
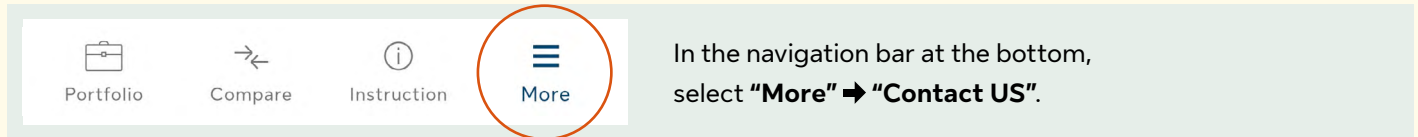
1. You will be redirected to [Online Pension Service Centre](#) website.
2. You can find forms, Key Scheme Information Document and guides that you want to view here.



Tips: You can also find the guide for [Online Pension Services Centre](#) here!

7.11 More - Contact Us

It's always a privilege to serve you. If you have any questions, you can view our contact information in the **Contact Us** page.



1. Here you can view our contact information.

2. Select **CALL** to contact us by phone.

3. Select **MAIL** to contact us by leaving a message.

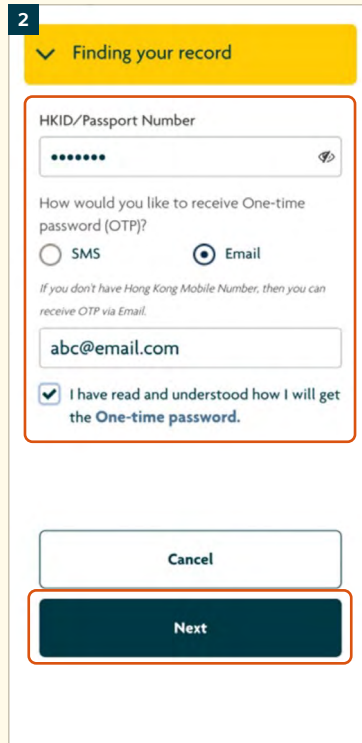


Tips: Tap on the map and you will be directly taken to the **Google Map** connected with our location.

8 Forgot Username or Password

If you have forgotten your username or password, now you can easily retrieve your username or reset a new password by using one-time password.

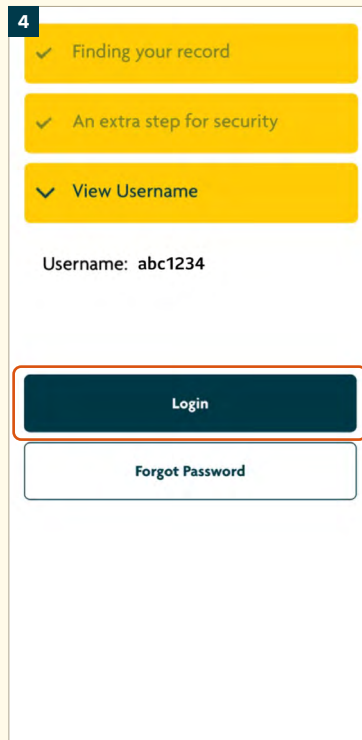
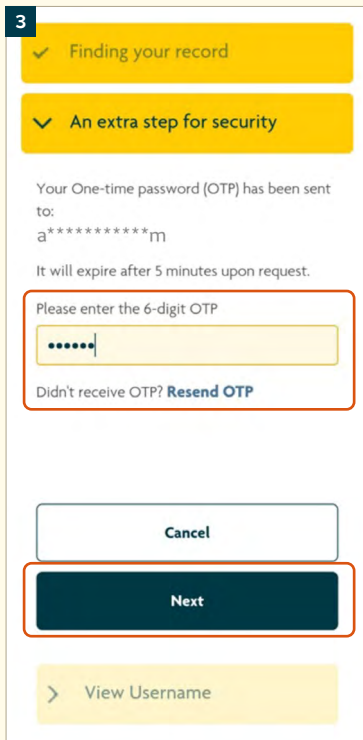
Forgot Username



1. Select "Forgot Username or password" at the login page → Select "I forgot my username" on the next page.
2. Input your **HKID/passport number** with your **registered mobile no./e-mail** for receiving **One-time password (OTP)** → Select **Next**.



Tips: Please make sure the HKID number that you input **includes all letters and numbers** (do not need to input brackets) e.g. A1234567.



3. Your **OTP** will be sent to your mobile/e-mail. Enter the **6-digit OTP** → Select **Next**.
4. **Your username** will appear on the page → Select **Login** to log in.

Forgot Password

1



Language EN ▾



Log in

Register an account

Forgot Username or password

2

✓ Finding your record

HKID/Passport Number
 Username

abc1234

How would you like to receive One-time password (OTP)?

SMS Email

If you don't have Hong Kong Mobile Number, then you can receive OTP via Email.

abc@email.com

I have read and understood how I will get the One-time password.

Cancel

Next

1. Select **"Forgot Username or password"** at the login page → Select **"I forgot my password"** on the next page.

2. Input your **HKID/passport number/username** with your **registered mobile no./e-mail** for receiving **One-time password (OTP)** → Select **Next**.



Tips: Please make sure the HKID number that you input **includes all letters and numbers** (do not need to input brackets) e.g. A1234567.

3

✓ Finding your record

✓ An extra step for security

Your One-time password (OTP) has been sent to:
a*****m

It will expire after 5 minutes upon request.

Please enter the 6-digit OTP

.....

Didn't receive OTP?
[Resend OTP](#)

Cancel

Next

4

✓ Finding your record

✓ An extra step for security

✓ New Password

Create Password

.....

Confirm Password

.....

Cancel

Submit

3. Your **OTP** will be sent to your mobile/e-mail. Enter the **6-digit OTP** → Select **Next**.

4. **Create password** → **Confirm password** → Select **Submit**.

Download and login the Sun Life MPF now to experience more!

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