

# 如何填寫「計劃成員整合個人帳戶申請表」

(第MPF(S)-P(C)號表格)

請根據以下指示按步填寫表格：

## 1 表格的第I部：填寫你的個人資料

## 2 表格的附錄：選擇你準備整合的「個人帳戶」，填寫計劃成員帳戶號碼

(附錄已詳列市場上所有營辦強積金計劃的受託人及其計劃名稱)

### 計劃成員帳戶號碼

你可透過以下方法取得有關號碼：

- 查閱你的權益報表；或
- 向受託人查詢。

## 3 表格的第II部：選定你心儀的計劃，填寫有關資料

你心儀的計劃可以是市場上任何一個強積金計劃，包括你現職的強積金計劃。

### 你選擇的計劃名稱

選定一個你心儀的計劃，把你在附錄上已選擇的「個人帳戶」整合至其下。

(附錄已詳列市場上所有營辦強積金計劃的受託人及其計劃名稱)

### 帳戶類別

#### 1. 「個人帳戶」

- 你準備整合的其中一個「個人帳戶」(即你目前已持有的「個人帳戶」)；或
- 你在市場上其他受託人及計劃下開立的一個全新「個人帳戶」(即你尚未持有帳戶，故請聯絡有關受託人辦理開戶手續及選擇投資組合)。

#### 2. 「供款帳戶」

- 即你在現職的強積金計劃下的「供款帳戶」。

如你選了現職的「供款帳戶」，則須填寫**僱主識別號碼**。你可透過以下方法取得有關號碼：

- 查閱你的權益報表；或
- 向你的僱主或受託人查詢。

### 計劃成員帳戶號碼

你可參考上文 **2** 所述的方法，取得計劃成員帳戶號碼。

如你剛辦妥參加手續，尚未獲悉該計劃的成員帳戶號碼，則可留空此項。

## 4 表格的第III部：緊記細閱授權及聲明，然後簽署

你在此表格上的簽署式樣應與你在附錄內指定的「個人帳戶」所屬的受託人紀錄相同。

如有疑問，請與有關的受託人聯絡。

請緊記，如你所提供的資料有誤或不完整，整合申請或會被延誤，甚至未能獲受託人處理。

## 參考樣本

第 MPF(S) - P(C) 號表格

IV.3 附件 C

### 第 MPF(S) - P(C) 號表格

#### 計劃成員整合個人帳戶申請表 (適用於整合多個個人帳戶至一個帳戶)

《強制性公積金計劃（一般）規例》（第 485A 章）第 149 條

第 I 部：計劃成員資料				
姓名 <sup>註 1</sup> (與香港身份證上的姓名相同)	姓氏：	陳		
	名字：	大文		
身份證明	香港身份證號碼：	N123456(7)		
	護照號碼： (僅供沒有香港身份證的成員填寫)			
聯絡資料	日間電話：	2012 3456	手提電話：	5222 2222
	電郵地址 (如有)：	xxx.xx@yyy.com.hk		
通訊地址	香港 / 九龍 / 新界 (請刪去不適用者)	上環		
	開心路	2	街道號碼	屋邨
	幸福大廈	3	座	8 樓層 A 室

第 II 部：我選擇的計劃	
本人選擇把附錄所指定的個人帳戶內的所有累算權益轉移至以下我選擇的計劃 <sup>註 2</sup> ：	
本人選擇的計劃名稱	XXXXX 計劃
帳戶類別 (只可選一項，請於適當方格內加上✓號)	<input checked="" type="checkbox"/> 個人帳戶 或 <input type="checkbox"/> 供款帳戶 (僱主識別號碼 <sup>註 3</sup> ：)
計劃成員帳戶號碼 <sup>註 4</sup>	111-111111-123

第 III 部：授權及聲明	
(a) 本人謹此同意，本人選擇的計劃的受託人可為處理本人轉移累算權益的目的，向有關受託人、相關服務提供者，以及包括積金局在內的其他相關機構／人士，披露在本表格及附錄收集的資料，或使該等機構／人士能夠取覽或披露相關資料。	
(b) 本人謹此指示在附錄中指定的受託人，在把本人於附錄所指定的個人帳戶內的所有累算權益轉移至本人選擇的計劃後，以及在該等帳戶內並無剩餘款項的情況下，終止該等個人帳戶。	
(c) 本人聲明已閱讀本表格第一頁的資料，而本人於本表格及附錄所提供的資料均正確及完整。	
簽署 <sup>註 5</sup>	8/9/2013 日期 (日/月/年)

2013 年 8 月—第 5 版

## 參考樣本

第 MPF(S) - P(C) 號表格

IV.3 附件 C

附錄：本人選擇整合的個人帳戶列表		
請於下表選出你選擇整合的個人帳戶，並填寫計劃成員帳戶號碼 <sup>註 5</sup> ：		
受託人名稱	計劃名稱	計劃成員帳戶號碼
友邦（信託）有限公司	友邦強積金尚選計劃	
	友邦強積金優選計劃	
	友邦強積金簡選計劃	
安盛信託有限公司	AXA 強積金 - 明智之選	
	AXA 強積金 - 易富之選	
銀聯信託有限公司	BCT（強積金）行業計劃	
	BCT 積金之選	
	德盛安聯強積金計劃	
	景順強積金策略計劃	
	AMTD 強積金計劃	
交通銀行信託有限公司	交通銀行愉盈退休強積金計劃	
東亞銀行（信託）有限公司	東亞（強積金）行業計劃	
	東亞（強積金）集成信託計劃	
	東亞（強積金）享惠計劃	
中銀國際英國保誠信託有限公司	中銀保誠簡易強積金計劃	
	我的強積金計劃	
中國人壽信託有限公司	中國人壽強積金集成信託計劃	
富衛退休金信託有限公司	富衛強積金集成信託基本計劃	
	富衛強積金集成信託綜合計劃	
滙豐機構信託服務（亞洲）有限公司	富達退休集成信託	
	海通 MPF 退休金	
HSBC Provident Fund Trustee (Hong Kong) Limited	恒生強積金易選計劃	
	恒生強積金精選計劃	
	恒生強積金智選計劃	
	恒生強積金自選計劃	
	滙豐強積金易選計劃	
	滙豐強積金精選計劃	
	滙豐強積金智選計劃	
	滙豐強積金自選計劃	
	施羅德強積金集成信託計劃	
宏利公積金信託有限公司	宏利寫意生活（強積金）計劃	
	宏利環球精選（強積金）計劃	
美國萬通信託有限公司	萬全強制性公積金計劃	
信安信託（亞洲）有限公司	信安強積金計劃 500 系列	
	信安強積金計劃 600 系列	
	信安強積金計劃 800 系列	
加皇信託香港有限公司	渣打強積金計劃 - 全面	
	渣打強積金計劃 - 基本	
永明信託有限公司	永明彩虹強積金計劃	

上表列出截至 2013 年 8 月 19 日的受託人及計劃資料

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How to fill in the “Scheme Member’s Request for Account Consolidation Form” (Form MPF(S)-P(C))

Please follow the steps below to fill in the form:

1 Section I of this form: fill in your personal details.

2 Appendix of this form: elect the personal accounts that you will consolidate, and fill in the scheme member account numbers. (All the trustees that provide MPF schemes in the market, and the names of these schemes, are listed in the Appendix)

Scheme Member Account Number

- You can obtain it by:
- Checking your benefit statement; or
  - Enquiring with your trustee.

3 Section II of this form: elect a scheme of your own choice, and fill in the relevant details.

A scheme of your own choice may be any MPF scheme available in the market, including an MPF scheme of your current employment.

Name of Your Elected Scheme

Elect a scheme of your own choice. The personal accounts you elected in the Appendix will be consolidated into this scheme.

(All the trustees that provide MPF schemes in the market, and the names of these schemes, are listed in the Appendix)

Account Type

1. Personal account
- One of the personal accounts that you will consolidate (i.e. a personal account that you already hold); or
  - A new personal account opened under another trustee and scheme available in the market (i.e. you do not currently hold a personal account under this trustee and scheme, so please contact the trustee to open an account and select an investment portfolio).
2. Contribution account
- Your contribution account under the MPF scheme of your current employment.

If you elect a contribution account of your current employment, you will need to fill in the employer identification number. You can obtain it by:

- Checking your benefit statement; or
- Enquiring with your employer or trustee.

Scheme Member Account Number

You may refer to the methods mentioned in 2 above to obtain your scheme member account number. You may leave the scheme member account number blank if you have just completed the enrolment procedures and have not yet been notified of your scheme member account number under the scheme.

4 Section III of this form: remember to read carefully the authorization and declaration statements before signing this form.

Your signature specimen on this form should be identical with the specimen of your signature held in the records of the trustees of the personal accounts that you have elected in the Appendix. If you have any enquiries, please contact the relevant trustee(s).

Please remember: your request for consolidation may be delayed, or even not be processed by the trustees, if you provide incorrect or incomplete information.

FORM MPF(S) - P(C)

Annex C to IV.3

Please use BLOCK LETTERS to complete this Form.

FORM MPF(S) - P(C)

SCHEME MEMBER’S REQUEST FOR ACCOUNT CONSOLIDATION FORM (for consolidating multiple personal accounts into one account)

Section 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap. 485A)

SECTION I. SCHEME MEMBER DETAILS

Name <sup>1</sup> (as shown on your Hong Kong Identity (HKID) Card)	Surname:	Chan		
	Other Name:	Tai Man		
Identification	HKID Card No.:	N123456(7)		
	Passport No.: (ONLY for member without HKID Card)			
Contact Details	Daytime Phone:	2012 3456	Mobile Phone:	5222 2222
	Email Address (if any):	xxx.xx@yyy.com.hk		
Correspondence Address	A	8	3	Lucky Tower
	Flat/Room	Floor	Block	Building
	Estate		2	Happy Road
Sheung Wan		Hong Kong / Kowloon / New Territories		
District / Country (if not Hong Kong)		(delete whichever is inappropriate)		

SECTION II. MY ELECTED SCHEME

I elect to transfer all accrued benefits from my personal accounts indicated in the Appendix to my elected scheme<sup>2</sup>:

Name of My Elected Scheme	xxxxx Scheme
Account Type (Select one only and ✓ as appropriate)	<input checked="" type="checkbox"/> Personal account OR <input type="checkbox"/> Contribution account (Employer Identification No. <sup>3</sup> :
Scheme Member Account No. <sup>4</sup>	111-111111-123

SECTION III. AUTHORIZATION AND DECLARATION

(a) I hereby give consent to the trustee of my elected scheme to disclose information collected in this Form and the Appendix to the trustee(s) concerned, the relevant service provider(s) and other appropriate parties including the MPFA, or to enable such party or parties to access or disclose relevant information for the purposes of processing the transfer of my accrued benefits.

(b) I hereby give the trustees indicated in the Appendix an instruction to terminate my relevant personal accounts as referred to in the Appendix upon transfer of the full accrued benefits to my elected scheme and there is no residual balance in the said accounts.

(c) I declare that I have read the notes on the first page of this Form and the information given in this Form and the Appendix is correct and complete.

Signature <sup>5</sup>	8/9/2013
	Date (DD/MM/YYYY)

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Sample

FORM MPF(S) - P(C)

Annex C to IV.3

APPENDIX. LIST OF MY PERSONAL ACCOUNTS FOR CONSOLIDATION

Please indicate the personal accounts you elect to consolidate by filling in the Scheme Member Account No.<sup>5</sup>:

Trustee Name	Scheme Name	Scheme Member Account No.
AIA Company (Trustee) Limited	AIA MPF - Basic Value Choice	
	AIA MPF - Prime Value Choice	
	AIA MPF - Simple Value Choice	
AXA China Region Trustees Limited	AXA MPF - Smart Plan	
	AXA MPF - Simple Plan	
Bank Consortium Trust Company Limited	BCT (MPF) Industry Choice	
	BCT (MPF) Pro Choice	
	Allianz Global Investors MPF Plan	
	Invesco Strategic MPF Scheme	
Bank of Communications Trustee Limited	AMTD MPF Scheme	
	BCOM Joyful Retirement MPF Scheme	
Bank of East Asia (Trustees) Limited	BEA (MPF) Industry Scheme	
	BEA (MPF) Master Trust Scheme	
BOCI-Prudential Trustee Limited	BEA (MPF) Value Scheme	
	BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme	
China Life Trustees Limited	My Choice Mandatory Provident Fund Scheme	
	China Life MPF Master Trust Scheme	
FWD Pension Trust Limited	FWD MPF Master Trust Basic Scheme	
	FWD MPF Master Trust Comprehensive Scheme	
HSBC Institutional Trust Services (Asia) Limited	Fidelity Retirement Master Trust	
	Haitong MPF Retirement Fund	
HSBC Provident Fund Trustee (Hong Kong) Limited	Hang Seng Mandatory Provident Fund - SimpleChoice	
	Hang Seng Mandatory Provident Fund - SuperTrust	
	Hang Seng Mandatory Provident Fund - SuperTrust Plus	
	Hang Seng Mandatory Provident Fund - ValueChoice	
	HSBC Mandatory Provident Fund - SimpleChoice	
	HSBC Mandatory Provident Fund - SuperTrust	
	HSBC Mandatory Provident Fund - SuperTrust Plus	
	HSBC Mandatory Provident Fund - ValueChoice	
Manulife Provident Funds Trust Company Limited	Schroder MPF Master Trust	
	Manu-Lifestyle (MPF) Scheme	
MassMutual Trustees Limited	Manulife Global Select (MPF) Scheme	
	MASS Mandatory Provident Fund Scheme	
Principal Trust Company (Asia) Limited	Principal MPF Scheme Series 500	
	Principal MPF Scheme Series 600	
	Principal MPF Scheme Series 800	
RBC Investor Services Trust Hong Kong Limited	Standard Chartered MPF Plan - Advanced	
	Standard Chartered MPF Plan - Basic	
Sun Life Trustee Company Limited	Sun Life Rainbow MPF Scheme	

The trustees and schemes listed above are as of: 19 August 2013

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Sample

2

Remember to fill in the scheme member account numbers of the personal accounts that will be consolidated. If the numbers are incorrect or incomplete, those accounts will not be consolidated.

4