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ERA

MANULIFE GLOBAL SELECT (MPF) SCHEME – EMPLOYER PARTICIPATION AGREEMENT
宏利環球精選（強積金）計劃 – 僱主參與協議

ERA

BETWEEN:

(1) **Manulife Provident Funds Trust Company Limited**, whose registered office is at 22/F., Manulife Financial Centre, 223 - 231 Wai Yip Street, Kwun Tong, Kowloon, Hong Kong (the "Trustee"); and
(2) the applicant, whose name and address are given in this Participation Agreement (the "Employer").

RECITALS:

(A) The Trustee is the Trustee of the **MANULIFE GLOBAL SELECT (MPF) SCHEME** (the "Master Trust Scheme"), which was established by a deed made by the Trustee (as may be amended from time to time, the "Deed").
(B) The Employer wishes to join the Master Trust Scheme in order to establish a retirement benefits scheme (the "Sub-Scheme") for the benefit of its employees.
(C) The Sub-Scheme shall be governed by the Deed and the rules attached thereto (the "Rules") and this Participation Agreement.
(D) Unless otherwise stated words and expressions used in this Participation Agreement shall have the meanings given to them in the Deed.

PROVISIONS:

1. The Employer hereby establishes the Sub-Scheme with effect from the commencement date as specified in this Participation Agreement. The Sub-Scheme shall be governed by the terms of the Deed, the Rules and this Participation Agreement.
2. The Employer hereby covenants with the Trustee to comply with and be bound by the provisions of the Deed, the Rules and this Participation Agreement and all applicable law and regulations.
3. The Employer warrants that the information contained in this Participation Agreement and any other information from time to time to be provided by the Employer in relation to contributions and as to the age, salary, length of service, benefits, Contribution Investment Instruction, Fund Switching Instruction and otherwise in relation to each Employee Member will be correct in all respects.
4. Subject to the provisions of the Master Trust Deed, the Rules and this Participation Agreement, the Employer undertakes and agrees, to hold the Trustee (and any Investment Manager who may be appointed under the Deed by the Trustee) indemnified against any and all proceedings, costs, charges, liabilities and expenses occasioned by any and all actions, claims, demands or proceedings in connection with the Trust or the Sub-Scheme arising:
   (i) out of the breach by the Employer of the warranty referred to in paragraph 3; or
   (ii) as a result of any failure or omission on the part of the Employer to duly and punctually perform or observe any obligations pursuant to the Master Trust Deed, the Rules and this Participation Agreement or otherwise so far as they relate to the Employer and Employee Members of the Sub-Scheme (whether they relate to the Employer and such Employee Members alone or together with another Employer and Employee Members of other Sub-Schemes).
5. The Employer undertakes and agrees to pay all fees and expenses which are payable by it under the terms of the Master Trust Deed, the Rules and this Participation Agreement.
6. The Trustee and the Employer hereby confirm and acknowledge that the details specified in this Participation Agreement shall apply for the purposes of the Sub-Scheme.
7. The Employer hereby agrees that the Trustee may, in its sole discretion, deduct the fees and expenses as specified in Clause 19.5.1 of the Deed from the Reserve Account of the Employer under the Sub-Scheme.
8. The amount of Employer's Regular Voluntary Contribution and Employee's Regular Voluntary Contribution are to be specified by the Employer to the Trustee in such form / manner as prescribed by the Trustee from time to time.
9. The vesting scale(s) referred to in Rule 7.3 of the Deed are specified in such form / manner as prescribed by the Trustee from time to time.
10. This Participation Agreement shall be terminated in accordance with Rule 19.5 of the Deed.
11. This Participation Agreement shall be governed by the laws of Hong Kong.

由下列雙方訂立：

(1) **宏利公積金信託有限公司**登記地址為香港九龍觀塘偉業街 223 - 231 號宏利金融中心 22 樓（下稱「受託人」）；及
(2) 申請人，其名稱及地址列於本參與協議上（下稱「僱主」）。

敘文：

(甲) 受託人指**宏利環球精選（強積金）計劃**（下稱「集成信託計劃」）之受託人，該計劃由受託人契據（下稱「契據」）形式成立（「契據」可不時被修正）。
(乙) 僱主欲藉加入集成信託計劃設立退休福利計劃（下稱「附屬計劃」）造福僱員。
(丙) 附屬計劃受契據及隨附之規則（下稱「規則」）與本參與協議管限。
(丁) 除非另有所指，否則本參與協議採用之字眼及詞彙應具有契約所賦予的含義。

條款：

1. 僱主謹從本參與協議上所示之生效日期起設立附屬計劃。附屬計劃受契據、規則及本參與協議管限。
2. 僱主謹與受託人契諾遵守契據、規則、本參與協議及所有適用法例與法規內之條款並受其約束。
3. 僱主保證本參與協議所載資料及僱主就涉及供款與僱員年齡、薪酬、年資、福利、供款投資指示及基金調配指示等事項不時提供之資料正確無誤。
4. 僱主根據集成信託契據、規則及本參與協議，承諾並同意就因下列情況引起且涉及信託及附屬計劃的任何行動、索償、要求或訴訟所招致的一切程序、費用、責任及開支，向受託人（及受託人根據契據委任的任何投資經理）作出彌償：
   (i) 因僱主違反上文第三段所述的保證；或
   (ii) 由於僱主因疏忽或遺漏而未能適當與及時履行或遵守集成信託契據、規則及本參與協議內所列有關附屬計劃僱主及僱員的責任（不論僅涉及個別僱主及僱員或有關其他附屬計劃的僱主及僱員）。

5. 僱主承諾並同意支付按集成信託契據、規則及本參與協議須要支付之一切費用及開支。
6. 受託人及僱主謹確認及聲明本參與協議內之資料同樣適用於附屬計劃。
7. 僱主同意受託人可全權酌情決定是否從僱主於附屬計劃中的儲備帳戶內扣除列於契據第 19.5.1 條的費用及開支。
8. 僱主定期自願性供款及僱員定期自願性供款的款額，由僱主以受託人不時指定的形式 / 方式向受託人註明。
9. 契據條款第 7.3 條論及之歸屬比例，已經以受託人不時指定的形式 / 方式向受託人註明。
10. 本參與協議可按契據規則第 19.5 條終止。
11. 本參與協議受香港法例管限。

Important Notes 重要事項 :

1. eMPF Platform Company Limited ("eMPF Company"), a wholly owned subsidiary of the Mandatory Provident Fund Schemes Authority ("MPFA"), will provide the scheme administration services to you through the eMPF Platform, subject to the "General Terms and Conditions of the eMPF Platform" which can be accessed from https://empf.org.hk/tnc/en. 積金易平台有限公司 (「積金易公司」) 是強制性公積金計劃管理局 (「積金局」) 的全資附屬公司。積金易公司將根據「積金易平台一般條款及細則」(可於 https://empf.org.hk/tnc 瀏覽)，透過積金易平台為你提供計劃行政服務。

General Terms and Conditions of the eMPF Platform
積金易平台一般條款及細則

2. Please read the following before completing this agreement: 填寫本協議前，請細閱以下部分：
   (i) the MPF Scheme Brochure and the Key Scheme Information Document ("KSID") of the Scheme. You can download the MPF Scheme Brochure and the KSID by visiting the website of MPFA (https://www.mpfa.org.hk/assets/OD/MT00482_Manulife_Global_Select_(MPF)_Scheme_EN.pdf) or scanning the QR code as shown in Part A below; and 本計劃之強積金計劃說明書及主要計劃資料文件。你可透過瀏覽積金局的網頁 (https://www.mpfa.org.hk/assets/OD/MT00482_Manulife_Global_Select_(MPF)_Scheme_CH.pdf) 或掃描於下列 A 部分所顯示的二維碼下載強積金計劃說明書及主要計劃資料文件；及
   (ii) Part F "Personal Information Collection Statement" ("PICS") of the eMPF Platform and the Scheme; and F 部分積金易平台及本計劃《收集個人資料聲明》(「聲明」)；及
   (iii) the following Important Notes. 以下重要事項。
3. If the employer is in doubt about the contents of this agreement, the MPF Scheme Brochure, the KSID or the trust deed ("Trust Deed") of the Scheme, the employer should consult his / her solicitor, accountant or financial advisor. 如僱主對本協議、本計劃之強積金計劃說明書、主要計劃資料文件或信託契約 (或稱信託契據) 的內容有疑問，應該諮詢其律師、會計師或財務顧問。
4. Please complete this agreement in BLOCK LETTERS with black or blue pen and tick the appropriate box(es). 請用黑色或藍色筆以正楷填寫本協議，並在適當空格內填上剔號。
5. Please countersign beside any amendment with the same signature as shown in Part G Authorization and Declaration. 如有刪改，請於更改位置旁加簽而該簽署必須與 G 部分授權及聲明的簽署相符。
6. The eMPF Platform will process this application upon receipt of this completed agreement and all relevant supporting document(s) (if any). If there are any omissions (including but not limited to missing page(s) / supporting document(s)), the eMPF Platform may not be able to process this application. 積金易平台收到完整協議及相關證明文件 (如有) 後，才會處理有關申請。如有遺漏 (包括但不限於頁數／證明文件不齊全)，積金易平台可能未能執行此申請。
7. "Participating Employer" means the company or individual whose details are set out in Part A of this agreement. 「參與僱主」指其資料列載於本協議 A 部分的公司或個人。
8. The information of the connected person(s) (including but not limited to contact person(s) / scheme authorized person(s)) is collected in their official capacities. 關連人士的資料 (包括但不限於聯絡人／計劃獲授權人士) 乃因應其職務身分而收集。
9. The employer particulars, including but not limited to company name, business registration no., jurisdiction of incorporation or organisation, registered address, principal business address and correspondence address, etc., provided in this agreement and other related documents will form part of tax residency self-certification for the entity / sole proprietor specified in Part A below. 於本協議提供的僱主資料，包括但不限於公司名稱、商業登記證號碼、公司或機構註冊所在的司法管轄區、註冊地址、主要業務地址及通訊地址等及其他相關文件，將會成為下列 A 部分中指定的實體／獨資經營者的稅務居民身分自我證明的一部分。
10. Information provided in this agreement will be updated by the eMPF Platform for the entity / sole proprietor for the purpose of Automatic Exchange of Financial Account Information ("AEOI") and Common Reporting Standard ("CRS"). The eMPF Platform will update the jurisdiction of tax residency to all your MPF account(s) maintained in the eMPF Platform. 積金易平台會將本協議所提供的資料用作更新實體／獨資經營者自動交換財務帳戶資料及「共同匯報標準」的用途。積金易平台將會更新你於積金易平台保存的所有強積金帳戶的稅務居民所在司法管轄區。

A. EMPLOYER PARTICULARS 僱主資料

(1) Scheme Details 計劃資料

(i) Name of Trustee 受託人名稱 **Manulife Provident Funds Trust Company Limited 宏利公積金信託有限公司** ("the Trustee"「受託人」)

(ii) Scheme Name 計劃名稱 **Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃** ("the Scheme"「本計劃」)

MPF Scheme Brochure & KSID
強積金計劃說明書及主要計劃資料文件

(2) Company Name of Participating Employer 參與僱主公司名稱 (As shown on registration document 必須與註冊證明文件相同)

English ____

____ ("Participating Employer")

中文 ____ (「參與僱主」)

(3) Registration Type 註冊類別

- ☐ (i) (BR) Business Registration [1] 商業登記 [1]
- ☐ (ii) (ED) Education Bureau 教育局
- ☐ (iii) (IR) Inland Revenue Department (Charitable Organisations) 稅務局 (慈善團體)
- ☐ (iv) (SO) Societies Office of the HK Police Force (Societies) 香港警務處社團事務處 (社團)
- ☐ (v) (TU) Registry of Trade Unions of the Labour Department 勞工處職工會登記局
- ☐ (vi) Others, please specify 其他，請註明 (e.g. Private driver, Owners' corporations, Office of Legislative Councilor 例如 : 私人司機、業主立案法團、立法會議員辦事處) ________________

Business / Other Registration No. [1] 商業／其他註冊證號碼 [1] |_|_|_|_|_|_|_|_|_|_|_|_|_|_|_| Branch No. [1] 分行號碼 [1] |_|_|_|

[1] For business registration, please provide 8 digits business registration no. and 3 digits branch code. 如屬商業登記，請提供包括 8 個位的商業登記證號碼及 3 個位的分行號碼。

(4) Incorporation Details 公司註冊資料 (Applicable to limited company only 只適用於有限公司)

(i) Certificate of Incorporation No. 註冊證明書編號 ________________

(ii) Date of Incorporation 註冊日期 __ __ / __ __ / __ __ __ __ DD / MM / YYYY 日／月／年

(iii) Place of Incorporation 註冊地點 ________________

(5) Organisation Type 機構類別

- ☐ (i) Limited Partnership 有限合夥
- ☐ (ii) Partnership 合夥經營
- ☐ (iii) Private Limited Company 私人有限公司
- ☐ (iv) Public Limited Company 公眾有限公司
- ☐ (v) Sole Proprietorship 獨資經營
- ☐ (vi) Others, please specify 其他，請註明 ________________

(6) Nature of Business 業務性質

- ☐ (i) Antiques 古董業
- ☐ (ii) Arms / Weapons / Military Force / Military Firms 軍火／武器／軍隊／軍事企業
- ☐ (iii) Art, Audio, Visual and Music Industry 藝術、音響、視覺及音樂行業 (e.g. Film / Television / Music Production 例如：電影／電視／音樂製作)
- ☐ (iv) Casino / Gambling / Gaming Entertainment 賭場／博彩／休閒娛樂 (e.g. Baths / Masseur / Snooker Centre / Disco / Night Club 例如：浴室／按摩院／桌球室／的士高／夜總會)
- ☐ (v) Catering 餐飲業
- ☐ (vi) Cleaning 清潔業
- ☐ (vii) Community / Social / Personal Services 社區／社會／個人服務業
- ☐ (viii) Construction 建造業
- ☐ (ix) Embassies 大使館
- ☐ (x) Finance / Insurance / Real Estate / Business Services 金融／保險／地產／商用服務
- ☐ (xi) Hairdressing and Beauty 理髮及美容業
- ☐ (xii) High-value Goods Trading 高價值商品貿易 (e.g. Precious Metals and Stones / Automobile / Artworks / Airplanes / Vessels 例如：貴金屬及寶石／汽車／藝術品／飛機／船隻)
- ☐ (xiii) Manufacturing 製造業
- ☐ (xiv) Mining and Quarrying 採礦及採石業
- ☐ (xv) Money Services 金錢服務 (e.g. Currency Exchange / Money Remitters / Cheque Cashiers 例如：貨幣兌換／匯款／支票兌現)
- ☐ (xvi) Pawn 典當業
- ☐ (xvii) Religious, Charities and Non-Profit Organizations 宗教、慈善及非牟利機構
- ☐ (xviii) Security Guard Services 保安服務業
- ☐ (xix) Transportation 運輸業
- ☐ (xx) Virtual Asset Services 虛擬資產服務 (e.g. Crypto Currency / Digital Currency Services 例如：加密貨幣／數碼貨幣服務)
- ☐ (xxi) Wholesale / Retail / Import and Export Trades 批發／零售／出入口貿易
- ☐ (xxii) Others, please specify 其他，請註明 ________________

(7) No. of Employees Joining The Scheme 參加本計劃的僱員人數 (Optional 可選填) |_|_|_|_|_|_|

(8) Registered Address 註冊地址 (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室 ______ Floor 層數 ______ Block 座 ______

Building / Estate 大廈／屋苑 ______

Street (Street No. and Street Name) 街道 (街號及街道名稱) ______

District Area 區域 ______

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆ ______ Country ◆ / Region ◆ 國家 ◆／地區 ◆ ______

Postal code ◆ 郵政編號 ◆ ______

◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

(9) Principal Business Address 主要業務地址

(If different from the above Registered Address, please provide either English OR Chinese address, P.O. Box address is not accepted 如與上述註冊地址不同，請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室 ______ Floor 層數 ______ Block 座 ______

Building / Estate 大廈／屋苑 ______

Street (Street No. and Street Name) 街道 (街號及街道名稱) ______

District Area 區域 ______

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆ ______ Country ◆ / Region ◆ 國家 ◆／地區 ◆ ______

Postal code ◆ 郵政編號 ◆ ______

◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

(10) Correspondence Address 通訊地址

(If different from the above Principal Business Address, please provide either English OR Chinese address 如與上述主要業務地址不同，請提供英文或中文地址)

Flat / Room 單位／室 ______ Floor 層數 ______ Block 座 ______

Building / Estate 大廈／屋苑 ______

Street (Street No. and Street Name) 街道 (街號及街道名稱) ______

District Area 區域 ______

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆ ______ Country ◆ / Region ◆ 國家 ◆／地區 ◆ ______

Postal code ◆ 郵政編號 ◆ ______

◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

B. CONNECTED PERSON DETAILS 關連人士資料

(1) Scheme Authorized Person(s) 計劃獲授權人

- A Scheme Authorized Person is authorized to act on behalf of the Participating Employer to handle all matters associated with the Participating Employer's participation in the Scheme, including but not limited to give instructions and grant the access right to other user(s) in eMPF Employer Portal to handle daily administration of the Payroll Group(s) in connection therewith. 計劃獲授權人獲授權代表參與僱主處理與本計劃有關的一切事宜，包括但不限於給予指示及授予其他用戶登入積金易僱主平台的使用權限，以處理相關工資組別的日常行政事宜。
- If the space provided below is insufficient, please provide information on photocopies of Part B(1). 如下列位置不敷應用，請影印 B(1) 部分以提供資料。

(i) Scheme Authorized Person 1 計劃獲授權人 1

a. **Title 稱謂** ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

b. **Name 姓名** (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同)

Surname in English 英文姓氏

Given Name in English 英文名字

Name in Chinese 中文姓名 (Surname 姓氏) ________ (Given Name 名字) ________

c. **Job Title 職銜** ________

d. **Identification 身分證明**

☐ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼

e. **Date of Birth 出生日期** __ __ / __ __ / __ __ __ __ DD / MM / YYYY 日／月／年

f. **Nationality 國籍** ________

g. **Residential Address 居住地址** (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室 ________ Floor 層數 ________ Block 座 ________

Building / Estate 大廈／屋苑 ________

Street (Street No. and Street Name) 街道 (街號及街道名稱) ________

District Area 區域 ________

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆ ________ Country ◆ / Region ◆ 國家 ◆／地區 ◆ ________

Postal code ◆ 郵政編號 ◆ ________

◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

h. **Mobile Phone No. 手提電話號碼** (Country / Area Code # 國家／地區編號 #)

i. **Secondary Telephone No. 第二聯絡電話號碼** (Country / Area Code # 國家／地區編號 #)

If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 如未有提供國家／地區編號，將預設為「香港 (852)」。

j. **Email Address 電郵地址** (Email from the eMPF Platform may include important information for MPF account of the company. Please ensure access security for the email address provided. 積金易平台發出的電郵可能載有你公司強積金帳戶的重要資料，請確保提供的電郵地址被安全使用。)

k. **Scheme Authorized Person's Signature Specimen 計劃獲授權人簽署樣式**

(ii) Scheme Authorized Person 2 計劃獲授權人 2 (If any 如有)

a. **Title 稱謂** ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

b. **Name 姓名** (As shown on HKID Card / Passport 與香港身份證╱護照上的姓名相同)

Surname in English 英文姓氏

Given Name in English 英文名字

Name in Chinese 中文姓名 (Surname 姓氏) ______ (Given Name 名字) ______

c. **Job Title 職銜** ______

d. **Identification 身分證明**

☐ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼

e. **Date of Birth 出生日期** __ __ / __ __ / __ __ __ __ DD / MM / YYYY 日╱月╱年

f. **Nationality 國籍** ______

g. **Residential Address 居住地址** (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位╱室 ______ Floor 層數 ______ Block 座 ______

Building / Estate 大廈╱屋苑 ______

Street (Street No. and Street Name) 街道 (街號及街道名稱) ______

District Area 區域 ______

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆ ______ Country ◆ / Region ◆ 國家 ◆╱地區 ◆ ______

Postal code ◆ 郵政編號 ◆ ______

◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

h. **Mobile Phone No. 手提電話號碼** (Country / Area Code # 國家╱地區編號 #)

i. **Secondary Telephone No. 第二聯絡電話號碼** (Country / Area Code # 國家╱地區編號 #)

If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 如未有提供國家╱地區編號，將預設為「香港 (852)」。

j. **Email Address 電郵地址** (Email from the eMPF Platform may include important information for MPF account of the company. Please ensure access security for the email address provided. 積金易平台發出的電郵可能載有你公司強積金帳戶的重要資料，請確保提供的電郵地址被安全使用。)

k. **Scheme Authorized Person's Signature Specimen 計劃獲授權人簽署樣式**

(2) Company Primary Contact Person for Daily Administration 公司日常行政的主要聯絡人

The information provided will be used by the eMPF Platform to contact the Company Primary Contact Person on daily administration issues related to the Scheme. Correspondence (including but not limited to e-notification (if any)) in relation to the Scheme will be addressed to the Company Primary Contact Person listed below. 積金易平台會以下列所提供資料，就本計劃日常行政事宜聯絡公司主要聯絡人。有關本計劃內的信件 (包括但不限於電子通訊 (如有)) 將會寄出予公司主要聯絡人。

Please choose ONE of the options below only. 請只揀選下列其中一項。

☐ (i) Same as Scheme Authorized Person 1 與計劃獲授權人 1 相同

☐ (ii) Same as Scheme Authorized Person 2 與計劃獲授權人 2 相同

☐ (iii) Company Primary Contact Person Details are as follows 公司主要聯絡人資料如下 :

a. **Title 稱謂** ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

b. **Name 姓名**

Surname in English 英文姓氏

Given Name in English 英文名字

Name in Chinese 中文姓名 (Surname 姓氏) ______________ (Given Name 名字) ______________

c. **Job Title 職銜** ______________

d. **Mobile Phone No. 手提電話號碼**
(To provide up-to-date MPF account information to your company, this field is mandatory. 為提供最新強積金帳戶資料予你公司，此欄位必須填寫。)

(Country / Area Code ▲ 國家／地區編號 ▲)

e. **Secondary Telephone No. 第二聯絡電話號碼**

(Country / Area Code ▲ 國家／地區編號 ▲)

▲ SMS (if applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊 (如適用) 只發送至香港手提電話號碼。如未有提供國家／地區編號，將預設為「香港 (852)」。

f. **Email Address 電郵地址** (Email from the eMPF Platform may include important information for MPF account of the company. Please ensure access security for the email address provided. 積金易平台發出的電郵可能載有你公司強積金帳戶的重要資料，請確保提供的電郵地址被安全使用。)

(3) Company Secondary Contact Person for Daily Administration 公司日常行政的第二聯絡人 (If any 如有)

The eMPF Platform will contact the Company Secondary Contact Person on daily administration issues if we cannot reach the Company Primary Contact Person. 如未能聯絡公司主要聯絡人，積金易平台會聯絡公司第二聯絡人跟進日常行政事宜。

Please choose ONE of the options below only. 請只揀選下列其中一項。

☐ (i) Same as Scheme Authorized Person 1 與計劃獲授權人 1 相同

☐ (ii) Same as Scheme Authorized Person 2 與計劃獲授權人 2 相同

☐ (iii) Company Secondary Contact Person Details are as follows 公司第二聯絡人資料如下 :

a. **Title 稱謂** ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

b. **Name 姓名**

Surname in English 英文姓氏

Given Name in English 英文名字

Name in Chinese 中文姓名 (Surname 姓氏) ____________ (Given Name 名字) ____________

c. **Job Title 職銜** ____________

d. **Mobile Phone No. 手提電話號碼** (Country / Area Code # 國家／地區編號 #)

e. **Secondary Telephone No. 第二聯絡電話號碼** (Country / Area Code # 國家／地區編號 #)

If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 如未有提供國家／地區編號，將預設為「香港 (852)」。

f. **Email Address 電郵地址** (Email from the eMPF Platform may include important information for MPF account of the company. Please ensure access security for the email address provided. 積金易平台發出的電郵可能載有你公司強積金帳戶的重要資料，請確保提供的電郵地址被安全使用。)

(4) Director(s) / Partner(s) / Sole Proprietor / Controller / Ultimate Owner 董事／合夥人／獨資經營者／管理人／最終擁有人 ("Principal(s)" 「主事人」)

- Applicable to Corporation / Partnership / Sole proprietorship / other types of organisation. 適用於法團／合夥經營／獨資經營／其他類別的機構。
- For Partnership, please list out, at least, two partners' information. 如屬合夥經營，請至少列出兩位合夥人資料。
- If the space provided below is insufficient, please provide information on photocopies of Part B(4). 如下列位置不敷應用，請影印 B(4) 部分以提供資料。

(i) Principal No.1's Particulars 第一位主事人資料

a. **Title 稱謂** ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

b. **Name 姓名** (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同)

Surname in English 英文姓氏

Given Name in English 英文名字

Name in Chinese 中文姓名 (Surname 姓氏) ____________ (Given Name 名字) ____________

c. **Identification 身分證明**

☐ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼

d. **Date of Birth 出生日期** __ __ / __ __ / __ __ __ __ DD / MM / YYYY 日／月／年

e. **Nationality 國籍** ____________

f. **Residential Address 居住地址** (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室 ____________ Floor 層數 ____________ Block 座 ____________

Building / Estate 大廈／屋苑 ____________

Street (Street No. and Street Name) 街道 (街號及街道名稱) ____________

District Area 區域 ____________

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆ ____________ Country ◆ / Region ◆ 國家 ◆／地區 ◆ ____________

Postal code ◆ 郵政編號 ◆ ____________

◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

(ii) Principal No.2's Particulars 第二位主事人資料 (If applicable 如適用)

a. Title 稱謂 ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

b. Name 姓名 (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同)

Surname in English 英文姓氏

Given Name in English 英文名字

Name in Chinese 中文姓名 (Surname 姓氏) ________ (Given Name 名字) ________

c. Identification 身分證明

☐ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼

d. Date of Birth 出生日期 __ / __ / ____ DD / MM / YYYY 日／月／年

e. Nationality 國籍 ________

f. Residential Address 居住地址 (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室 ________ Floor 層數 ________ Block 座 ________

Building / Estate 大廈／屋苑 ________

Street (Street No. and Street Name) 街道 (街號及街道名稱) ________

District Area 區域 ________

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆ ________ Country ◆ / Region ◆ 國家 ◆／地區 ◆ ________

Postal code ◆ 郵政編號 ◆ ________

◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

(5) Beneficial Owner(s) 實益擁有人

- A beneficial owner in relation to a corporation is an individual who directly or indirectly owns or controls 25% or more of the issued share capital of the corporation or voting rights at general meetings of the corporation or who exercises ultimate control over the management of the corporation, or if the corporation is acting on behalf of another person, means the other person. 與法團有關的實益擁有人即直接或間接擁有或控制該法團已發行的股本或該法團成員大會投票權 25% 或以上或行使對該法團的管理最終控制權的人士，或如該法團代表另一位人士，則指該人士。
- If the space provided below is insufficient, please provide information on photocopies of Part B(5). 如下列位置不敷應用，請影印 B(5) 部分以提供資料。
- If information relating to the Beneficial Owner(s) needs to be updated in the future, please submit "Employer Information Change Form" to provide the updated information as soon as practicable and in any case within 30 days of change. 如未來需要更改實益擁有人的資料，請在合理而切實可行範圍內儘快及在任何情況下須於資料更改後 30 天內遞交「僱主更改資料表格」以提供更新資料。

(i) Title 稱謂 ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

(ii) Name 姓名 (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同)

Surname in English 英文姓氏

Given Name in English 英文名字

Name in Chinese 中文姓名 (Surname 姓氏) ________ (Given Name 名字) ________

(iii) Identification 身分證明

☐ HKID Card 香港身份證 ☐ Passport 護照 (Applicable ONLY for an individual without HKID Card 僅供沒有香港身份證人士填寫)

Document No. 證件號碼

(iv) Date of Birth 出生日期 ___ / ___ / ____ DD / MM / YYYY 日／月／年

(v) Nationality 國籍 ____________________

(vi) Residential Address 居住地址 (Please provide either English OR Chinese address, P.O. Box address is not accepted 請提供英文或中文地址，恕不接受郵政信箱地址)

Flat / Room 單位／室 ____________ Floor 層數 ____________ Block 座 ____________

Building / Estate 大廈／屋苑 ____________________

Street (Street No. and Street Name) 街道 (街號及街道名稱) ____________________

District Area 區域 ____________________

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆ ____________ Country ◆ / Region ◆ 國家 ◆／地區 ◆ ____________

Postal code ◆ 郵政編號 ◆ ____________________

◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

C. SCHEME DETAILS & ADMINISTRATION ARRANGEMENT 計劃詳情及行政安排

(1) Scheme Commencement Date 計劃生效日期 ___ / ___ / ____ DD / MM / YYYY 日／月／年

(2) Payroll Group Details 工資組別資料

If your company has more than one payroll group, please provide information on photocopies from Part C(2) to C(10) and attach for submission. 如你公司有多於一個工資組別，請影印 C(2) 至 C(10) 部分以提供資料並一併遞交。

(i) Payroll Group Type 工資組別類別 (Please choose ONE of the options below only. If no choice is made, it will be defaulted to "Regular Employee". 請只揀選下列其中一項。如沒有作出選擇，工資組別類別將預設為「一般僱員」。)

☐ a. Regular Employee 一般僱員 ☐ b. Casual Employee 臨時僱員

(ii) Payroll Group Name 工資組別名稱 (Please provide Payroll Group Name, e.g. ABC Limited Company - N.T. branch / ABC Reporting Centre / Monthly Payroll Group. If no information is provided, it will be defaulted to "01". 請提供工資組別名稱，例如：ABC 有限公司 - 新界分店／ ABC 隸屬中心／每月工資組別。如沒有提供資料，工資組別名稱將預設為「01」。)

____

(iii) Payroll Group ID 工資組別編號 (Please provide Payroll Group ID, e.g. Tuen Mun 1 / TM01 / PG1. If no information is provided, it will be defaulted to "01". 請提供工資組別編號，例如：Tuen Mun 1 / TM01 / PG1。如沒有提供資料，工資組別編號將預設為「01」。)

(3) Payroll Group Primary Contact Person for Daily Administration 工資組別日常行政的主要聯絡人

The information provided will be used by the eMPF Platform to contact the Payroll Group Primary Contact Person on daily administration issues related to this Payroll Group. Correspondence (including but not limited to e-notification (if any)) in relation to this Payroll Group will be addressed to the Payroll Group Primary Contact Person listed below. 積金易平台會以下列所提供資料，就工資組別日常行政事宜聯絡工資組別主要聯絡人。有關工資組別的信件 (包括但不限於電子通訊 (如有)) 將會寄出予工資組別主要聯絡人。

Please choose ONE of the options below only. 請只揀選下列其中一項。 (If no choice is made, it will be defaulted to "Same as Company Primary Contact Person". 如沒有作出選擇，工資組別日常行政的主要聯絡人將預設為「與公司主要聯絡人相同」。)

☐ (i) Same as Scheme Authorized Person 1 與計劃獲授權人 1 相同

☐ (ii) Same as Scheme Authorized Person 2 與計劃獲授權人 2 相同

☐ (iii) Same as Company Primary Contact Person 與公司主要聯絡人相同

☐ (iv) Same as Company Secondary Contact Person 與公司第二聯絡人相同

☐ (v) Payroll Group Primary Contact Person Details are as follows 工資組別主要聯絡人資料如下 :

a. Title 稱謂 ☐ Mr 先生 ☐ Ms 女士 ☐ Miss 小姐 ☐ Mrs 太太 ☐ Dr 博士

b. Name 姓名

Surname in English 英文姓氏 ____________________

Given Name in English 英文名字 ____________________

Name in Chinese 中文姓名 (Surname 姓氏) ____________ (Given Name 名字) ____________

c. Job Title 職銜 ____________________

d. Mobile Phone No. 手提電話號碼
(To provide up-to-date MPF account information to your company, this field is mandatory. 為提供最新強積金帳戶資料予你公司，此欄位必須填寫。)

(Country / Area Code ▲ 國家／地區編號 ▲) ____________________

e. Secondary Telephone No. 第二聯絡電話號碼

(Country / Area Code ▲ 國家／地區編號 ▲) ____________________

▲ SMS (if applicable) will be sent to Hong Kong mobile phone no. only. If no country / area code is provided, it will be defaulted to "Hong Kong (852)". 短訊 (如適用) 只發送至香港手提電話號碼。如未有提供國家／地區編號，將預設為「香港 (852)」。

f. Email Address 電郵地址 (Email from the eMPF Platform may include important information for MPF account of the company. Please ensure access security for the email address provided. 積金易平台發出的電郵可能載有你公司強積金帳戶的重要資料，請確保提供的電郵地址被安全使用。)

____

(4) Payroll Group Correspondence Address 工資組別通訊地址

(If different from the above Company Correspondence Address, please provide either English OR Chinese address 如與上述公司通訊地址不同，請提供英文或中文地址)

Flat / Room 單位／室 ____________ Floor 層數 ____________ Block 座 ____________

Building / Estate 大廈／屋苑 ____________________

Street (Street No. and Street Name) 街道 (街號及街道名稱) ____________________

District Area 區域 ____________________

☐ Hong Kong 香港 ☐ Kowloon 九龍 ☐ New Territories 新界

City ◆ 城市 ◆ ____________ Country ◆ / Region ◆ 國家 ◆／地區 ◆ ____________

Postal code ◆ 郵政編號 ◆ ____________________

◆ Applicable to address outside Hong Kong only 只適用於香港以外地址

(5) Contribution Details 供款詳情

(i) Contribution Frequency 供款週期

(If no information is provided below, it will be defaulted to the first day of the "Monthly" basis. 如沒有提供下列資料，供款週期將預設為「每月」的第一天。)

☐ a. Monthly 每月 : 1st Contribution day 首次供款開始日 (Calendar Date of each month 每月的曆日) (e.g. from 1st day to month end 例如：1 號至該月的最後 1 天) ⎵⎵ DD 日

☐ b. Semi-monthly 每半月 : 1st Contribution day 首次供款開始日 (Calendar Date of each month 每月的曆日) (e.g. 1st to 15th 例如：1 號至 15 號) ⎵⎵ DD 日

2nd Contribution day 第二個供款開始日 (Calendar Date of each month 每月的曆日) (e.g. 16th to month end 例如：16 號至該月的最後 1 天) ⎵⎵ DD 日

☐ c. Fortnightly 每兩周 : 1st Contribution period 首次供款期

From 由 ⎵⎵ / ⎵⎵ / ⎵⎵⎵⎵ DD / MM / YYYY 日／月／年 To 至 ⎵⎵ / ⎵⎵ / ⎵⎵⎵⎵ DD / MM / YYYY 日／月／年

(e.g. 2nd Jun to 15th Jun 例如：6 月 2 號至 6 月 15 號)

☐ d. Weekly 每周 :

- ☐ 1. From Monday to Sunday 由星期一至星期日
- ☐ 2. From Tuesday to Monday 由星期二至星期一
- ☐ 3. From Wednesday to Tuesday 由星期三至星期二
- ☐ 4. From Thursday to Wednesday 由星期四至星期三
- ☐ 5. From Friday to Thursday 由星期五至星期四
- ☐ 6. From Saturday to Friday 由星期六至星期五
- ☐ 7. From Sunday to Saturday 由星期日至星期六

☐ e. Others, please specify 其他，請註明 : ____________________

(ii) Contribution Bill Generation Day 供款帳單編印日

(If no information is provided, contribution bill generation day will be defaulted to 15th of the month. 如沒有提供資料，供款帳單編印日將預設為每月的 15 日。) ⎵⎵ DD 日

(6) Payment Method 付款方法

Please choose ONE of the options below only. Method of payment will be defaulted as by "Cheque" without prior notice if no option is chosen. 請只揀選下列其中一項。如沒有就付款方法作出選擇，付款方法將預設為「支票」及不作另行通知。

☐ (i) Direct Debit [2] 直接扣帳 [2]

☐ (ii) Cheque 支票 (Payment can be made via HSBC cheque deposit machines ("CQM"). Please select "03" for the CQM bill type and input your 16-digit "MPF Contribution Bill No." or 16-digit eMPF "Submission Reference No.". 供款支票可透過滙豐銀行存支票機存入。請在存支票機上選擇帳單類別「03」，並輸入你的 16 位數字「強積金供款帳單號碼」或 16 位數字積金易「提交參考編號」。)

Form Centre 表格中心

[2] The setup of direct debit takes approximately 3 to 6 weeks from receipt of your completed "Direct Debit Authorization" ("DDA Form"). The eMPF Platform will send your company a confirmation notifying you the success of direct debit setup. Please settle contribution by other payment means before direct debit setup is completed. Please download "DDA Form" via visiting the website of the eMPF Platform (https://empf.org.hk/forms/en) or scanning the QR code and complete "DDA Form". 設立直接扣帳由收到完整「直接付款授權」(「直接付款授權表格」) 起計，約需時三至六個星期，積金易平台將會發出確認書，通知你公司有關直接扣帳申請成功設立。於直接扣帳辦妥前，請透過其他付款途徑付款。請透過瀏覽積金易平台的網頁 (https://empf.org.hk/forms) 或掃描二維碼下載及填寫「直接付款授權表格」。

(7) Remittance Statement ("RS") Arrangements 付款結算書安排

(Please choose one of the options below. If no choice is made, it will be defaulted to generate RS with contribution data [3]. 請揀選下列其中一項。如沒有作出選擇，付款結算書將預設為包括供款資料 [3]。)

☐ (i) No need to generate and send hard copy RS 不需郵寄及編印付款結算書

☐ (ii) Generate RS with Contribution Data [3] and follow my / our e-Communications option (if applicable) 付款結算書需包括供款資料 [3] 並按照本人／我們的電子通訊選項作出安排 (如適用)

☐ (iii) Generate RS without Contribution Data [3] and follow my / our e-Communications option (if applicable) 付款結算書不需包括供款資料 [3] 並按照本人／我們的電子通訊選項作出安排 (如適用)

[3] Contribution data included Relevant Income, Employer and Employee's Mandatory Contributions and Voluntary Contributions (if any). Contribution data is provided based on the eMPF Platform's recorded data of last payroll period (if any). 供款資料包括有關入息、僱主及僱員的強制性和自願性供款 (如有)。而供款資料將根據積金易平台於上一個支薪期所記錄的資料 (如有) 而定。

(8) Contribution Arrangement for Insufficient Payment [4] 款額不足的供款安排 [4]

To avoid delay in contribution processing, the eMPF Platform will allocate the contribution to your employee accounts **on pro-rata basis** if the payment received is not sufficient to settle the required contributions. If you would like to have other arrangement, please tick the following box. 為免延誤處理供款，如所收款額不足以處理供款，積金易平台將**按供款比例**分配至你的僱員帳戶。如你公司擬另作安排，請剔選以下方格。

☐ The Participating Employer hereby gives instructions to hold up the contribution payment and allocation until the payment is sufficient to cover the total required contributions. 參與僱主謹此指示暫緩處理供款款額及分配，直至有足夠款額處理供款總數。

[4] This may result in delay in contribution allocation and you may also be subject to payment of surcharges for the outstanding contributions. 這可能會導致延遲處理你公司的供款，你亦可能須要支付未繳供款的附加費。

(9) Contribution Approval Setting 審批供款設定 (Applicable to online remittance statement in eMPF Employer Portal only. Please choose one of the options below. If no choice is made, it will be defaulted to Not Require Approval from the Scheme Authorized Person. 只適用於積金易僱主平台網上付款結算書。請揀選下列其中一項。如沒有作出選擇，將預設為不需計劃獲授權人的批准。)

- ☐ (i) Not Require Approval from the Scheme Authorized Person 不需計劃獲授權人的批准
- ☐ (ii) Require Approval from the Scheme Authorized Person 需要計劃獲授權人的批准

(10) Bank Account No. for Payment Deposit (If any) [5] 存入款項銀行戶口號碼 (如有) [5] (Optional 可選填)
(If there is any refund, the payment will be deposited to the following designated overseas / other places bank account only. Otherwise, it will be defaulted as by "Cheque". 如有任何退款，有關款項將只存入下列指定海外／其他地方銀行戶口。否則，付款方法將預設為「支票」。)

Name of Bank Account Holder 銀行戶口持有人姓名 (A bank account rather than the name of registered employer is not accepted 恕不接受非註冊僱主名稱的銀行戶口)

____

Name of Bank 銀行名稱 ______________________________

Account No. 戶口號碼 ______________________________

<u>For overseas / other places bank only 只適用於海外／其他地方銀行 :</u>

Currency 貨幣 ______________________________

Overseas / Other Places Bank Address 海外／其他地方銀行地址 ______________________________

____

Country / Region 國家／地區

Overseas / Other Places Bank Swift Code 海外／其他地方銀行 Swift 代碼 ______________________________

Intermediary Bank Name 中介銀行名稱 ______________________________ (If applicable 如適用)

Intermediary Bank Swift Code 中介銀行 Swift 代碼 ______________________________ (If applicable 如適用)

Other Settlement Information (e.g. IBAN) 其他結算資料 (例如國際銀行帳戶號碼) ______________________________ (If applicable 如適用)

Others (e.g. Employer's overseas address / phone no.) 其他 (例如僱主海外地址／電話號碼) ______________________________

______________________________ (If applicable 如適用)

[5] Bank charges may be incurred in relation to deposit payment to the local bank or overseas / other places bank account. The bank charges will be deducted from the above bank account (if any) associated with bank deposited. In addition, the refund payment amount will be impacted by exchange rate (if applicable). 本地銀行或海外／其他地方銀行戶口存款可能會衍生銀行收費。銀行存款相關的收費 (如有) 將於上述銀行戶口扣除。此外，退回供款金額將受匯率影響 (如適用)。

D. VOLUNTARY CONTRIBUTIONS 自願性供款

If you would like to make voluntary contributions, please download "Voluntary Contributions Application / Change Form" via visiting the website of the eMPF Platform (https://empf.org.hk/forms/en) or scanning the QR code and complete "Voluntary Contributions Application / Change Form". 如你公司擬作出自願性供款，請透過瀏覽積金易平台的網頁 (https://empf.org.hk/forms) 或掃描二維碼下載及填寫「自願性供款申請／更改表格」。

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E. SELF-CERTIFICATION OF TAX RESIDENCY AND TAXPAYER IDENTIFICATION NUMBER OR ITS FUNCTIONAL EQUIVALENT ("TIN") [6] 稅務居民身分自我證明及稅務編號或具有等同功能的識辨編號 (「稅務編號」) [6]

- This is a self-certification provided by you to Trustee for the purpose of Automatic Exchange of Financial Account Information ("AEOI") in compliance with tax law and regulations (including but not limited to the Inland Revenue Ordinance (Cap.112) and regulations based on the Organisation for Economic Cooperation and Development ("OECD") Common Reporting Standard ("CRS") for automatic exchange of information). 這是你向受託人提供的自我證明，以作自動交換財務帳戶資料用途以遵守稅務法律及規例 (包括但不限於《稅務條例》(第 112 章) 及根據自動交換資料有關的經濟合作與發展組織 (「OECD」)《共同匯報標準》(「CRS」) 的規則）。
- The information provided by you in this part will be updated by the eMPF Platform for all your MPF account(s) maintained in the eMPF Platform for the purpose of AEOI and CRS. 你於本部分提供的資料將會更新你於積金易平台保存的所有強積金帳戶用作自動交換財務帳戶資料及「共同匯報標準」的用途。
- Each jurisdiction has its own rules for defining tax residence, and various jurisdictions provide information on how to determine if you are resident in that particular jurisdiction for tax purposes. In general, you will find that your jurisdiction of tax residence is the jurisdiction / country in which you live. Special circumstances may cause you to be resident elsewhere or resident in more than one jurisdiction / country at the same time (dual residency) for tax purposes. For more information on jurisdiction of tax residence, please consult your tax adviser or the information at the OECD automatic exchange of information portal (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/). 每個稅務管轄區會按照其稅務法律訂定稅務居民的定義，並提供相關資料讓你判定是否屬某一稅務管轄區的稅務居民。一般而言，你的稅務居留司法管轄區／國家會根據你的居住地點而定，因此，如你有多於一處居所 (雙重居住地)，你可能會同時成為多個稅務管轄區／國家的稅務居民。有關稅務居民身分的更多資訊，請諮詢你的稅務顧問或瀏覽 OECD 的自動交換資料網頁 (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/)。
- If you (or the individual account holder, if you are completing the self-certification on the individual account holder's behalf) are tax resident in a reportable jurisdiction [7] of Hong Kong, you will be classified as a reportable person for AEOI, the Trustee will be legally obliged to pass on the information provided in this self-certification and other financial information with respect to your / the account holder's account(s) to the Hong Kong Inland Revenue Department ("IRD"), and they will transmit this information to the tax authorities of which you are / the account holder is tax resident. 如你 (若你以獲授權人身分填寫此自我證明，則該個別人士帳戶持有人) 的稅務居民所在地屬香港申報稅務管轄區 [7]，你將會被界定為自動交換資料下的申報對象，受託人在法律上有義務將你／該帳戶持有人於此自我證明申報的資料，你／帳戶持有人財務帳戶有關的某些財務資料轉交予香港稅務局，而相關資料或會與你／該帳戶持有人作為稅務居民所屬的稅務機關交換。
- The employer particulars, including but not limited to company name, business registration no., jurisdiction of incorporation or organisation, registered address and correspondence address, etc., provided in this agreement and other related documents will form part of this self-certification. 於本協議及其他相關文件所提供的僱主資料，包括但不限於公司名稱、商業登記號碼、公司或機構註冊所在的司法管轄區、註冊地址及通訊地址等，將會成為此自我證明的一部分。
- This self-certification will remain valid unless there is any change in circumstances relating to information that makes this self-certification incorrect, inaccurate or incomplete. You must notify the eMPF Platform / the Trustee and provide an updated self-certification within 30 days of such change in circumstances. 除非情況有所改變而引致已提交的自我證明上的資料不正確、不準確或不完整，否則該已提交的自我證明仍具十足效力。如情況有所改變，你務必通知積金易平台／受託人，並需要在發生改變後 30 天內向積金易平台／受託人提供一份已更新的自我證明。
- The eMPF Platform **MUST** obtain the complete and valid tax residency self-certification for the setting up of employer account. To avoid any delay in the setting up of employer account and contribution settlement (if any), please read and complete all the appropriate parts below. 積金易平台在開立僱主帳戶前，**必須**取得完整及有效的稅務居民身分自我證明。為避免僱主帳戶開立及供款處理 (如有) 有任何延誤，請細閱並完成以下所有適用部分。
- The eMPF Platform / The Trustee has right to require you to provide all relevant identification / verification documentation. Failure in providing the information and other personal data as requested may result in your application / instruction not being able to be processed. 積金易平台／受託人有權要求你提供所有相關的身分證明／驗證文件。如未能提供所需資料及其他個人資料，可能導致你的申請／指示不獲處理。
- Kindly note that the eMPF Platform / the Trustee is not allowed to offer any tax or legal advice to you. For tax-related questions, please consult your tax adviser or visit the OECD website (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) and IRD's AEOI website (www.ird.gov.hk/eng/tax/dta_aeoi.htm), or simply scan the QR code, for more CRS and related information. 請注意積金易平台／受託人不獲允許向你提供稅務或法律意見。任何稅務相關的疑問，請諮詢專業稅務顧問或瀏覽 OECD (http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/) 及稅務局 (http://www.ird.gov.hk/chi/tax/dta_aeoi.htm) 有關自動交換財務帳戶資料的網頁，或掃描此二維碼，以獲取更多 CRS 及相關資料。

OECD-CRS　　IRD 稅務局

- For the terms and expressions in this part, please refer to https://www.ird.gov.hk/eng/pdf/2016/terms.pdf. 請參考 https://www.ird.gov.hk/chi/pdf/2016/terms.pdf 以查閱本部分的名詞及措辭釋義。

The Entity mentioned in this part refers to a corporation, partnership, a body of persons or a trust (excluding sole proprietors). If you are a sole proprietor, please complete Part E(1) and (2) only (as applicable). 本部分所指之「實體」為法團、合夥、任何其他團體或信託 (獨資經營者除外)。如你是獨資經營者，只需填寫 (適用的) E(1) 及 (2) 部分。

(1) Entity / Sole Proprietor Tax Residence is 實體／獨資經營者之稅務居住地為 (Please tick one of the appropriate boxes. 請在其中一個適當的方格上填上剔號。)

☐ (i) Hong Kong **ONLY**, with no tax residence in any other jurisdictions / countries (the TIN is as noted in below [8])
只有香港，及沒有處於任何其他司法管轄區／國家的稅務居住地 (其稅務編號如以下所註 [8])
(Please skip Part E(2). 請略過 E(2) 部分。)

☐ (ii) Hong Kong (the TIN is as noted in below [8]) and also some other jurisdictions / countries
香港 (其稅務編號如以下所註 [8]) 及其他司法管轄區／國家
(Please fill out Part E(2). 請填寫 E(2) 部分。)

☐ (iii) NOT Hong Kong, but instead some other jurisdictions / countries
不是香港而是其他司法管轄區／國家
(Please fill out Part E(2). 請填寫 E(2) 部分。)

(2) Jurisdiction of Tax Residency 稅務居民所在司法管轄區

Please list **(i)** ALL jurisdictions / countries (other than Hong Kong) where the account holder is a resident for tax purposes and **(ii)** the account holder's TIN [6] for each jurisdiction / country. If the space provided is insufficient, please provide it in the below format on additional sheet(s). 請在以下列明 **(i)** 帳戶持有人作為稅務居民的所有司法管轄區／國家 (香港以外)，以及 **(ii)** 各司法管轄區／國家發出予帳戶持有人的稅務編號 [6]。如下列位置不敷應用，請按以下格式另加新頁。

Jurisdiction / Country of Tax Residency 稅務居民所在司法管轄區／國家		TIN [6] 稅務編號 [6]	If no TIN available, please indicate Reason A, B or C [9] below 若未能提供稅務編號，請於下方填上理由 A、B 或 C [9]	Please explain why you are unable to obtain a TIN if you selected Reason B. 若你選擇理由 B，請在下方解釋無法取得稅務編號的原因。
a.				
b.				
c.				

[6] For more guidance on a TIN, please visit the OECD website at https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-identification-numbers/, or simply scan the QR code. 如欲了解相關稅務居民司法管轄區發佈的稅務編號，你可瀏覽 OECD 網頁 https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-identification-numbers/，或掃描此二維碼。

OECD-TIN

[7] For the list of reportable jurisdiction of Hong Kong, please refer to the IRD's website at https://www.ird.gov.hk/eng/tax/aeoi/rpt_jur.htm. 有關香港申報稅務管轄區名單，請參考稅務局的網頁：https://www.ird.gov.hk/chi/tax/aeoi/rpt_jur.htm。

[8] If the account holder is a tax resident of Hong Kong, the TIN is: 如帳戶持有人是香港稅務居民，稅務編號是 :
- Entity 實體： First 8 digits of the Hong Kong Business Registration No. / TIN 香港商業登記號碼前 8 位數字／稅務編號
- Sole proprietor 獨資經營者 : HKID Card No. / TIN 香港身份證號碼／稅務編號

[9] Reason A 理由 A - The jurisdictions / country where the Entity / Sole Proprietor is a resident for tax purposes does not issue TINs to its residents. 實體／獨資經營者所屬的稅務居民的司法管轄區／國家沒有向其居民發出稅務編號。

Reason B 理由 B - The Entity / Sole Proprietor is unable to obtain a TIN. (Please explain why you are unable to obtain TIN in the above table if you have selected this reason.) 實體／獨資經營者無法獲得稅務編號。(若你選擇這理由，請在上表解釋你無法獲得稅務編號的原因。)

Reason C 理由 C - No TIN is required. (Note: Only select this reason if the authority of the relevant jurisdictions / countries of residence do not require the TIN to be disclosed.) 無需稅務編號。(註：只有在相關司法管轄區／國家的主管當局不需要披露該司法管轄區／國家發出的稅務編號方可選擇這理由。)

(3) Entity Type [10] 實體類別 [10] (Not applicable to sole-proprietorship 不適用於獨資經營)

Please tick one of the appropriate boxes and provide the relevant information. 請在其中一個適當的方格上填上剔號，並提供有關資料。

Financial Institution 財務機構 (Please skip Part E(4) 請略過 E(4) 部分)	☐ (i)	Custodial Institution, Depository Institution or Specified Insurance Company 託管機構、存款機構或指明保險公司
	☐ (ii)	Investment Entity, except an investment entity that is managed by another financial institution (e.g. with discretion to manage the entity's assets) and located in a non-participating jurisdiction 投資實體，但不包括由另一財務機構管理 (例如：擁有酌情權管理投資實體的資產) 並位於非參與稅務管轄區的投資實體
Active Non-Financial Entity ("NFE") 主動非財務實體 (Please skip Part E(4) 請略過 E(4) 部分)	☐ (i)	NFE the stock of which is regularly traded on ____________________ , which is an established securities market 該非財務實體的股票經常在 ____________________ (一個具規模證券市場) 進行買賣
	☐ (ii)	Related entity of ___________________ , the stock of which is regularly traded on ___________________ , which is an established securities market 為 __________________ 的有關連實體，該有關連實體的股票經常在 __________________ (一個具規模證券市場) 進行買賣
	☐ (iii)	NFE is a governmental entity, an international organisation, a central bank, or an entity wholly owned by one or more of the foregoing entities 政府實體、國際組織、中央銀行或由前述的實體全權擁有的其他實體
	☐ (iv)	Active NFE other than the above, please specify 除上述以外的主動非財務實體，請說明______________________
Passive NFE 被動非財務實體 (Please fill out Part E(4) 請填寫 E(4) 部分)	☐ (i)	Investment entity that is managed by another financial institution and located in a non-participating jurisdiction 位於非參與稅務管轄區並由另一財務機構管理的投資實體
	☐ (ii)	NFE that is not an active NFE 不屬主動非財務實體的非財務實體

[10] Please refer to the definitions of different entity types at https://www.ird.gov.hk/eng/pdf/2016/terms.pdf. 不同實體類別之定義請參考 https://www.ird.gov.hk/chi/pdf/2016/terms.pdf。

(4) Controlling Person [11] 控權人 [11] (Complete this part if the entity account holder is a passive NFE 如實體帳戶持有人是被動非財務實體，填寫此部分)

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- Please indicate the name of all controlling person(s) of the entity in the table below. If no natural person exercises control over an entity which is a legal person, the controlling person will be the individual holding the position of senior managing official. 請填寫實體之所有控權人的姓名在列表內。就法人實體，如沒有自然人行使控制權，控權人將會是該法人實體的高級管理人員。
- Please download "Tax Residency Self-certification (Controlling Person)" via visiting the website of the eMPF Platform (https://empf.org.hk/forms/en) or scanning the QR code and each controlling person is required to complete a separate "Tax Residency Self-certification (Controlling Person)". 請透過瀏覽積金易平台的網頁 (https://empf.org.hk/forms) 或掃描二維碼下載及每位控權人須另外填寫一份「稅務居民身分自我證明 (控權人)」。

(i)		(iv)	
(ii)		(v)	
(iii)		(vi)	

[11] Please refer to the definitions of controlling person at https://www.ird.gov.hk/eng/pdf/2016/terms.pdf. 控權人之定義請參考 https://www.ird.gov.hk/chi/pdf/2016/terms.pdf。

✦ Warning 警告：
It is an offence under section 80(2E) of the Inland Revenue Ordinance if any person, in making a self-certification, makes a statement that is misleading, false or incorrect in a material particular AND knows, or is reckless as to whether, the statement is misleading, false or incorrect in a material particular. A person who commits the offence is liable on conviction to a fine at level 3 (i.e. HKD10,000).根據《稅務條例》第80(2E) 條，如任何人在作出自我證明時，在明知一項陳述在要項上屬具誤導性、虛假或不正確，或罔顧一項陳述是否在要項上屬具誤導性、虛假或不正確下，作出該項陳述，即屬犯罪。一經定罪，可處第3 級罰款(即港幣10,000元)。

F. "PERSONAL INFORMATION COLLECTION STATEMENT" ("PICS") OF THE eMPF PLATFORM AND THE SCHEME 積金易平台及本計劃《收集個人資料聲明》(「聲明」)

Personal Information Collection Statement of The eMPF Platform 積金易平台收集個人資料聲明

eMPF Platform Company Limited may need to collect, process and hold your personal data for the purposes of your enrolment to an MPF scheme and administration of your MPF account. Your personal data may also be used, transferred or disclosed to other parties for purposes as set out in our Personal Information Collection Statement (PICS). If you are already registered with the eMPF Platform, you have already agreed to be bound by our PICS, the latest version of which is set out below. If you are not yet registered, please refer to our PICS set out below. By providing your personal data in this form, you consent to eMPF Platform Company Limited collecting, using and holding your personal data in accordance with our Personal Information Collection Statement. 積金易平台有限公司可能需要收集、處理及持有你的個人資料，用作處理你的強積金計劃登記和你的強積金帳戶管理的用途。你的個人資料亦可能會根據我們的收集個人資料聲明中所列明的用途而被使用、轉移或披露給第三方。若你已註冊積金易平台，即表示你已同意我們的收集個人資料聲明，其最新版本載於下文。若你尚未註冊，請參閱我們以下的收集個人資料聲明。你透過此表格提供個人資料，即表示你同意積金易平台有限公司根據我們的收集個人資料聲明收集、處理及持有你的個人資料。

Personal Information Collection Statement 收集個人資料聲明

This Personal Information Collection Statement (this "**Statement**") is made in accordance with the requirements of the Personal Data (Privacy) Ordinance (Chapter 486 of the Laws of Hong Kong) (the "**PDPO**") and the guidelines issued by the Office of the Privacy Commissioner for Personal Data. This Statement notifies you of the personal data from time to time collected, processed and held by eMPF Platform Company Limited ("**we**", "**us**" or "**eMPF Company**"), the purposes for which your personal data will be used and to whom it may be disclosed, and your rights under the PDPO to access and correct your personal data. 本收集個人資料聲明（本「**聲明**」） 是根據《個人資料（私隱）條例》（香港法例第 486 章）（「《**私隱條例**》」）的規定及個人資料私隱專員公署發出的指引而制定。本聲明旨在向你闡釋積金易平台有限公司（「**本公司**」、「**我們**」或「**積金易公司**」）不時收集、處理及持有你的個人資料、有關個人資料的用途和可能獲提供有關個人資料的對象，以及你可根據《私隱條例》查閱及更正有關個人資料的權利。

You may learn more about our policies on the collection, use, transfer, retention and protection of your personal data from our Privacy Policy, which is available at www.empf.org.hk/page/privacy-policy. 你可於本公司的《私隱政策》了解更多關於我們收集、使用、移轉、保留及保護你的個人資料的政策。

1. Personal Data collected and maintained by eMPF Company 積金易公司收集及保存的個人資料

The "electronic MPF system" (as defined in the MPFSO) administered and operated by eMPF Company is designated by the Secretary for Financial Services and the Treasury under the Mandatory Provident Fund Schemes Ordinance (Chapter 485 of the Laws of Hong Kong) (the "**MPFSO**") to, inter alia, provide Mandatory Provident Fund ("**MPF**") scheme administration services to facilitate approved trustees of registered schemes in performing their scheme administration functions. eMPF Company provides such MPF scheme administration services through the "electronic MPF system" and other offline facilities including the service centres, administrative centres and call centres (collectively the "**eMPF Platform**"). Personal data which may from time to time be collected, processed and held by eMPF Company in respect of you includes: 根據《強制性公積金計劃條例》（香港法例第 485 章）（「《**強積金條例**》」），財經事務及庫務局局長指定以積金易公司管理和營運的「電子強積金系統」（定義見《強積金條例》）（其中包括）向強制性公積金（「**強積金**」）註冊計劃的核准受託人提供強積金計劃管理服務，以利便核准受託人執行他們的計劃管理職能。積金易公司通過「電子強積金系統」及其他實體設施，包括服務中心、行政中心以及電話支援服務中心（統稱「**積金易平台**」）提供有關強積金計劃管理服務。積金易公司可能不時收集、處理及持有與你有關的個人資料包括：

a. information which you provide during enrolment to an MPF scheme; 你就參與強積金計劃提供的資料；
b. information which you provide during registration for the eMPF Platform (including, if applicable, your Hong Kong Identity Card image and your facial image(s), which are collectively referred to as "identity verification data") and, regardless of any such registration, when you transact with the eMPF Platform; 你就登記使用積金易平台（包括你的香港身份證的影像及面部影像（統稱為「**身分驗證資料**」）（如適用）），以及你使用積金易平台（無論有否進行登記）進行交易時提供的資料；
c. information disclosed by or transferred from approved trustees of your MPF schemes; 由你的強積金計劃的核准受託人披露或移轉的資料；
d. details of transactions or other dealings in connection with your MPF schemes including, without limitation, information collected to handle your enquiries, complaints, applications, instructions and requests; 你的強積金計劃的交易詳情或其他事務往來，包括但不限於為處理你的查詢、投訴、申請、指示及要求而收集的資料；
e. (processed with your consent if required under the PDPO) information from other third parties and public sources, including but not limited to government authorities; and 來自包括但不限於政府機構的其他第三方或公共來源的資料（如《私隱條例》要求，將在獲得你同意的情況下進行處理）；及

f. information obtained or generated in the course of our performance of scheme administration services and other statutory functions under the MPFSO. 本公司根據《強積金條例》履行提供計劃管理服務及其他法定職能過程中取得或產生的資料。

Please note that personal data and other information requested (except those marked as “optional”) must be provided before we can provide you with the relevant service(s) under the eMPF Platform. If you fail to provide such personal data and other information, or if they are inaccurate or incomplete, we may not be able to process your transactions and / or requests, or otherwise provide you with the relevant service. 請注意，本公司只有在取得所有我們要求有關你的個人資料及其他資料（除非標記為「可選填」外）後，方能為你提供積金易平台的相關服務。如你未能提供上述個人資料及其他資料，或該等資料屬不準確或不完整，本公司可能無法處理你的交易及／或要求，或為你提供相關服務。

2. Purposes of Collection of Personal Data 收集個人資料的用途

We may collect, process and hold your personal data for the following purposes: 本公司可收集、處理及持有你的個人資料作下列用途：

a. in relation to your identity verification data, to perform biometric authentication of your identity through eKYC (but not the “iAM Smart” digital identity platform and/or the biometric authentication function built in your device) under the eMPF mobile application; 就你的身分驗證資料而言，通過積金易流動應用程式（「**應用程式**」）中的電子身分驗證程序（eKYC）（不涉及「智方便」（iAM Smart）數碼身份平台及 / 或你裝置內建的生物辨識功能），對你的身分進行生物特徵認證；
b. to authenticate your identity through the “iAM Smart” digital identity platform; 通過「智方便」（iAM Smart）數碼身份平台驗證你的身分；
c. to facilitate your access to, and the management of your MPF account; 協助你查閱及管理強積金帳戶；
d. to process, administer and implement your applications, requests or instructions, and to provide you with such services as may from time to time be agreed with the approved trustees of your MPF schemes, all in connection with your MPF schemes; 處理、管理及執行你就強積金計劃所提出的申請、要求或指示，以及根據本公司不時與你的強積金計劃的核准受託人達成的協定，提供有關的服務；
e. for data matching with personal data and other information about you or your employer(s) for scheme administration and other related purposes; 就計劃管理及其他相關用途，與你或你的僱主的個人及其他資料進行比對；
f. for our internal business and administrative purposes, including but not limited to maintaining the security of the eMPF Platform, improvement of user experience, development of the eMPF Platform, administration of our risk management policies and procedures and for the purpose of compiling statistics and undertaking data analysis and other research; 用作本公司內部業務及行政管理的用途，包括但不限於維持積金易平台的安全、改善用戶體驗、發展積金易平台、執行風險管理政策和程序，以及用作數據統計、資料分析及其他研究用途；
g. to communicate with you, and to provide you with customer services; 與你溝通並為你提供客戶服務；
h. for complying with applicable laws and regulations, and any request or direction of, or responding to requests from, regulators, law enforcement agents or other government authorities; 遵從適用的法律和法規，以及監管機構、執法機關或其他政府部門的任何要求或指示，或回應其要求；
i. for protecting or exercising our rights, including but not limited to dealing with your complaints or inquiries, and taking any legal actions; 保障或行使本公司的權利，包括但不限於處理你的投訴或查詢，以及採取任何法律行動；
j. for handling any legal, regulatory or administrative proceedings, investigations or inquiries before any court or competent authority; 處理任何法庭或主管機關的法律、監管或行政管理程序、調查或查詢；
k. for detecting and preventing crime and other unlawful behaviour; 偵查及阻止犯罪及其他違法行為；
l. for any other purposes or functions from time to time specified or designated under the MPFSO; 《強積金條例》不時訂明或指定的任何其他用途或功能；
m. with your consent (including any indication of no objection), for conducting direct marketing in accordance with Section 4 below, whether for itself or on behalf of approved trustees of your MPF schemes; and 經你同意（包括表示不反對），根據下文第 4 條為本公司或代表你的強積金計劃的核准受託人進行直接促銷；及
n. other purposes directly relating to any of the above. 其他與任何上述內容有直接關係的用途。

3. Classes of Transferees 承轉人類別

Your personal data may be transferred or disclosed to the following parties for the purposes mentioned above: 你的個人資料可能就上述用途被移轉或披露予下列人士：

a. your employers and approved trustees of your MPF schemes; 你的僱主及強積金計劃的核准受託人；
b. our agent, adviser, service provider and contractor who provides administrative, telecommunications, computer, payment, fraud prevention, insurance, data processing, information technology, legal, accounting, operational and/or other services or support to us in connection with the operations of the eMPF Platform; 任何就積金易平台的營運而向本公司提供管理、電訊、電腦、付款、反欺詐、保險、資料處理、資訊科技、法律、會計、營運及／或其他服務或支援的代理人、顧問、服務供應商或承辦商；
c. the Mandatory Provident Fund Schemes Authority (“**MPFA**”), other government authorities and agencies, courts, regulatory or administrative bodies, law enforcement agencies and other bodies or persons to whom we are under an obligation to make disclosure under any legal, regulatory or administrative requirements applicable to us; and 強制性公積金計劃管理局（「**積金局**」）、其他政府部門及機構、法庭、監管機構或行政管理機構、執法機構及其他機構或人士，如本公司須按照任何適用法律、法規或行政命令向其作出披露；及
d. any other person as agreed with you from time to time. 你不時同意的任何其他人士。

Your personal data may be provided to any of the above parties who may be located in or outside of Hong Kong. If we do transfer your personal data outside of Hong Kong, we will do so in compliance with the requirements of the PDPO. 你的個人資料可被提供予任何位於香港境內或境外的上述人士。如本公司將你的個人資料轉移至香港境外，我們會遵照《私隱條例》的相關規定行事。

4. Direct Marketing 直接促銷

With your consent, we may use your name, contact details, date of birth, business registration / identification number, financial background, demographic data and information about your MPF schemes, transaction patterns and your interactions with the eMPF Platform (as applicable) for the purposes of: 經你同意，本公司可能使用你的姓名、聯絡資料、出生日期、商業登記證 / 身分證號碼、財務狀況、有關你的強積金計劃的統計數據及資料、在積金易平台（若適用）的交易模式和互動情況，作下列用途：

a. marketing the eMPF Platform and related products and services; and 宣傳積金易平台及相關產品和服務；及
b. offering or advertising the availability of the MPFA's facilities or services relating to its publicity, promotional, educational or other similar activities. 提供或推廣積金局在宣傳、推廣、教育或其他類似活動方面的設施或服務。

With your written consent, we may provide your personal data as mentioned in the paragraph above to the approved trustees of MPF schemes in which you participate or have participated in and such approved trustees may transfer your personal data to the MPF scheme provider of such MPF schemes, each for their direct marketing of: 經你書面同意，本公司可能將你的個人資料（如上段所述）提供予你所參與或曾參與的強積金計劃的核准受託人，而該核准受託人可能將你的個人資料轉移予該強積金計劃的強積金計劃營辦人，用作其各自直接促銷以下各項：

a. pension, financial, insurance and related services and products; and 退休金、金融、保險及相關服務和產品；及
b. rewards, loyalty or privileges programmes and related services and products. 獎賞、忠誠或特選計劃及相關服務和產品。

You may withdraw your consent at any time by paper form or via the web portal. Once your request is processed by us, we will not use your personal data and/or will not transfer the same to the relevant approved trustees (as the case may be) for direct marketing purposes. 你可隨時透過書面表格或網上平台取消你的同意。本公司於完成處理你的取消同意的要求後，將不會使用你的個人資料及／或不會將你的個人資料移轉予相關核准受託人（視乎情形而定）作直接促銷用途。

5. Access and Correction 查閱及更正

You may request access to, or correction of, your personal data being held by us. For any such request, please contact our Data Protection Officer: 你可要求查閱或更正本公司所持有關於你的個人資料。如需提出有關要求，請聯絡我們的資料保護主任：

Mail : PO Box 98929 Tsim Sha Tsui Post Office
郵寄：尖沙咀郵政局郵政信箱 98929 號
Email 電郵：dpo@support.empf.org.hk

Please note that all data access or correction requests should be made by using the Data Access Request Form from time to time specified by the Privacy Commissioner for Personal Data. You may also visit any one of the eMPF Service Centres in person to obtain and submit the form. 請注意，所有個人資料查閱或更正的要求均須使用個人資料私隱專員不時指明的《查閱資料要求表格》作出。你亦可親身前往任何一間積金易服務中心索取及遞交有關表格。

We may refuse to comply with a data access or correction request in the circumstances specified in sections 20 or 24 of the PDPO, including but not limited to circumstances where the data access or correction request is not made in Chinese or English. 請注意，本公司可在《私隱條例》第 20 或 24 條訂明的情況下拒絕遵從個人資料查閱或更正的要求，包括但不限於當有關個人資料查閱或更正的要求並非以中文或英文作出。

We may require you to provide identity proof for handling your data access or correction request, and we may charge a fee for complying with your data access request. 處理個人資料查閱或更正的要求時，本公司或會要求你提供身分證明文件，並可就你的資料查閱的要求收取費用。

6. Miscellaneous 其他事宜

We may update this Statement from time to time, and the most recent version can be found at www.empf.org.hk/pics . We will notify you of any update to this Statement and, where required by the PDPO, obtain your consent. 本公司會不時更新本聲明，最新版本可參閱 www.empf.org.hk/pics。我們會通知你有關本聲明的更新，並在《私隱條例》有要求的情況下取得你的同意。

If there is any inconsistency or ambiguity between the English and Chinese versions of this Statement, the English version will prevail. 如本聲明的中英文版本有任何不一致或歧義，應以英文版本為準。

☐ Please tick the box if you do not agree to provide your consent for your personal data to be used for direct marketing purposes in accordance with the "Direct Marketing" section of the Personal Information Collection Statement of eMPF Platform Company Limited. Your indication herein will replace any indication of choice you may have previously provided to eMPF Platform Company Limited in relation to "Direct Marketing". 若你不同意積金易平台有限公司根據其收集個人資料聲明內的「直接促銷」部分，使用你的個人資料以作直接促銷之用途，請在方格內填上剔號。你在此作出之指示，將取代你先前可能已向積金易平台有限公司提供任何有關選擇「直接促銷」的指示。

Personal Information Collection Statement of Manulife Global Select (MPF) Scheme 宏利環球精選（強積金）計劃收集個人資料聲明

Notice to Customers relating to the Personal Data (Privacy) Ordinance (“**Notice**”)

Definitions

1. **“Data access request”**, **“data correction request”**, **“data subject”**, **“data user”**, **“direct marketing”**, **“matching procedures”** and **“personal data”** used throughout this Notice shall have the meaning as defined in the Ordinance.

   For the purpose of this Notice:

   “customers” shall, for the purpose of this Notice, mean data subjects and include (but not be limited to) existing and prospective insurance policy owners, insured, beneficiaries and other persons designated or entitled to receive moneys and/or other benefits under an insurance policy; and members under an occupational retirement scheme; and scheme members under a mandatory provident fund scheme; and share/unit holders of investment funds; and any individuals from whom Manulife may collect personal information, regardless of whether they currently hold a policy or have a formal business relationship with Manulife.

   “Hong Kong” shall mean the Hong Kong Special Administrative Region.

   “Manulife” shall mean Manulife (International) Limited, Manulife Provident Funds Trust Company Limited, Manulife Investment Management (Hong Kong) Limited, or a Manulife Fund (as the case may be) in respect of its respective customers.

   “Manulife Fund” shall mean any investment fund sponsored or managed from time to time by a member of the Manulife Group (including but not limited to Manulife Global Fund and Manulife Advanced Fund SPC) and **“Manulife Funds”** shall mean all such investment funds.

   “Manulife Group” shall mean Manulife Financial Corporation and its subsidiaries and affiliates from time to time (including but not limited to Manulife (International) Limited, Manulife Provident Funds Trust Company Limited, Manulife Investment Management (Hong Kong) Limited), and Manulife Funds. The rights and obligations of each member of Manulife Group under this Notice are several and not joint. No member of Manulife Group shall be liable for an act or omission by another member of Manulife Group.

   “Ordinance” shall mean Personal Data (Privacy) Ordinance (Cap 486).

Collection

2. From time to time, it is necessary for customers to supply Manulife with personal data for various purposes, including but not limited to, the establishment or continuation of interactions, or the provision of products or services. Providing personal data to Manulife is voluntary, but failure to supply such data may result in Manulife being unable to establish or continue Manulife's various engagements or provide products or services.

3. Personal data is also collected or received by Manulife from any person acting on the customer's behalf or other sources available to Manulife, in the ordinary course of interactions, for example, when an application is made for a change of beneficiary/insured member under the insurance policy; or when notification is made by the employer of a change of employment/address of an employee member of an occupational retirement scheme/mandatory provident fund scheme; or when a joint share holder of an investment fund applies for investment fund switching.

Purposes

4. The purposes for which personal data of a customer may be used will vary depending on the nature of the customer's relationship with Manulife. Such purposes may include the following:
    a. processing, assessing, determining, and approving applications and/or requests made by customers for products and/or services offered by Manulife;
    b. providing services to customers, including but not limited to administering, advisory, investment management, maintaining, communicating, managing, and operating products and/or services provided to customers, including but not limited to confirming the accuracy of information collected;
    c. confirming the customer's identity and uniquely identifying the customer;
    d. processing any medical, security, eligibility, and underwriting checks;
    e. understanding the customer's financial situation, such as understanding and evaluating financial appetite and needs, evaluating the customer's application, assessing the risks taken on by Manulife, and dealing with claims submitted to Manulife;
    f. any purposes in connection with any claims made by or against or otherwise involving customers in respect of any products and/or services. In these instances, Manulife may collect, use, and disclose relevant information, including but not limited to, making, defending, analysing, investigating, processing, assessing, determining, or responding to such claims. Apart from the necessary processing associated with such claims, Manulife may also use this information to detect and prevent fraud, whether or not relating to the policy issued in respect of the application;
    g. providing investment management services, dealing and advisory services, custody services and other services under the terms and conditions of the accounts a customer holds with Manulife;
    h. performing and/or exercising any rights, functions, and activities Manulife may have in connection with the products and/or services offered by Manulife or those by Manulife's business partners to customers, including but not limited to marketing (see **"Use/Provision of Personal Data in Direct Marketing"** below), audit, reporting, research, analysis, reinsurance, and general servicing and maintenance of online and other services;
    i. researching and/or designing products and/or services for customers, and promoting, improving, and furthering the provision of products and/or services;
    j. conducting matching procedures on any data held which relates to customers from time to time for any of the purposes listed herein, whether or not for the purpose of taking adverse actions against customers such as declining an application;
    k. making disclosure under and/or complying with, whether compulsory or voluntary, any present or future law, rules, regulations, judgment, court order, sanctions regime, codes of practice, guidelines or guidance, demand, request, or commitment or arrangement binding on or applicable to Manulife or any member of Manulife Group within or outside Hong Kong including but not limited to making disclosure and/or compliance with any court, legal, local or foreign regulatory, governmental, administrative (credit reference agencies or auditors), tax, law enforcements, or other authorities, or self-regulatory and industry bodies, or associations, or federations, or similar organizations relevant to Manulife Group (collectively the **"Authorities"**);
    l. complying with any contractual or other commitment or arrangement with the Authorities that are assumed by or imposed on Manulife or any member of Manulife Group by reason of its financial, commercial, business, or other interests or activities in or related to the jurisdiction;
    m. for operational purposes, credit assessment, credit scoring models, or statistical analysis (including in each case, behaviour analysis and evaluation on the overall relationship with Manulife Group which includes using such data to comply with any obligations, requirements, policies, procedures, measures, or arrangements for sharing data and information within Manulife Group and/or other use of data and information in accordance with any Manulife programmes for compliance with sanctions or prevention or detection of money laundering, terrorist financing, or other unlawful activities), whether on the data subjects or otherwise;
    n. exercising any rights, including but not limited to subrogation, if applicable, Manulife may have in connection with the provision to customers of products and/or services;
    o. verifying and conducting identity and/or credit checks and/or debt collection;
    p. determining any amount of indebtedness owing to or from customers, and collecting and recovering any amount owing from customers or any person who has provided any security or undertaking for customers' liabilities;
    q. enabling an actual or proposed assignee, transferee, participant or sub-participant of the rights or business of Manulife or any member of Manulife Group to evaluate and/or undertake due diligence in relation to the transaction intended to be the subject of the assignment, transfer, participation or sub-participation;
    r. purposes specifically provided for in any particular service or product offered or to be offered by Manulife; and
    s. any purposes relating to any of the above (including seeking professional advice) or any other purposes in accordance with the general policies of Manulife or any member of Manulife Group in relation to insurance, occupational retirement schemes, mandatory provident fund schemes, investment funds, wealth management services and other financial products and services as set out in notices, circulars, or other terms and conditions made available by Manulife or any member of Manulife Group to customers from time to time.

Transferees

5. Personal data of a customer held by Manulife will be kept confidential, but subject to the provisions of any applicable law. Manulife may transfer such data to the following persons and/or entities (whether within or outside Hong Kong) to fulfil any of the purposes set out in paragraph 4 above:
    a. any person in connection with any claims made by or against or otherwise involving customers in respect of any products and/or services provided by Manulife;
    b. any agent, contractor, sub-contractor, or third party service provider (including their employees) who provides administrative, financial advisory, legal counsel, telecommunications, computer, information technology, payment, securities clearing, debt collection, data processing or storage, marketing (including direct marketing services), mailing, printing, telemarketing, call centre services, customer satisfaction analysis, distribution, publishing, research, or other services to Manulife or any member of Manulife Group in connection with the operation of and provision of Manulife services to customers, including any custodian, administrator, investment manager, investment adviser or distributor;
    c. any credit reference agencies or, in the event of default, any debt collection agencies;
    d. any adviser, adjuster, or other intermediary authorized by Manulife for the distribution of products and/or services, including their employees;
    e. reinsurers, private investigators, hospitals, clinics, laboratories, health care professionals, technicians, medical service providers, loss adjustors, legal advisers, and financial advisers that may be engaged by Manulife or on behalf of Manulife;
    f. charitable or non-profit making organizations;
    g. employers of the customers;
    h. third party financial institutions, insurers, credit card companies, securities and investment service providers, third party reward, loyal, co-branding programme providers or merchants, or any person which has undertaken to Manulife or any member of Manulife Group to keep such data confidential;
    i. any actual or proposed assignee, transferee, participant or sub-participant of the rights or business of Manulife or Manulife Group;
    j. any member identified as a Manulife Group, including subsidiary and affiliates;
    k. Manulife's business partners (see **"Use/Provision of Personal Data in Direct Marketing"** below);
    l. any Authorities;
    m. organisations that consolidate claims and underwriting information for the insurance industry, fraud prevention organisations, other insurance companies (whether directly or through fraud prevention organisation or other persons named in this paragraph), the police and databases or registers (and their operators) used by the insurance industry to analyse and check information provided against existing information; and
    n. any other person in the context of the sale or transfer by Manulife or any Manulife Group of all or part of its business or portfolio of products, policies or other assets or any proposed or confirmed transaction relating to such sale or transfer.

USE OF PERSONAL DATA IN DIRECT MARKETING

6. Manulife intends to use, from time to time, customer's personal data in direct marketing of the following classes of products and services:
    a. insurance, provident funds and/or schemes, investment funds, wealth management services, or other financial products and services;
    b. reward, loyalty or privilege programmes and related products and services; and
    c. products and services of co-branding partners of any member of Manulife Group (the names of such co-branding partners can be found in the application form(s) for the relevant products and services as the case may be).

6.1. Only the following kinds of personal data of the customer may be used in such direct marketing:
    a. name;
    b. gender;
    c. date of birth;
    d. part of identification document number;
    e. contact information (including but not limited to phone number, fax number, email address, correspondence address and residential address); and
    f. information about the products and/or services the customer has purchased or applied, including the distribution channels (including their individual advisers or intermediaries) through which the products and/or services were purchased or applied for.

6.2. Manulife will not so use the data unless it has received the customer's consent (which includes an indication of no objection) to the intended use.

PROVISION OF PERSONAL DATA FOR USE IN DIRECT MARKETING

7. Manulife intends to provide, from time to time and for money and other property, customer's personal data to Manulife Group (other than Manulife itself) for use by Manulife Group in direct marketing of the following products and services:
    a. insurance, provident funds and/or schemes, investment funds, wealth management services, or other financial products and services;
    b. reward, loyalty or privilege programmes and related products and services; and
    c. products and services of co-branding partners of any member of Manulife Group (the names of such co-branding partners can be found in the application form(s) for the relevant products and services as the case may be).

7.1. Only the following kinds of personal data of the customer may be provided to Manulife Group (other than Manulife itself) for use by Manulife Group in such direct marketing:
    a. name;
    b. gender;
    c. date of birth;
    d. part of identification document number;
    e. contact information (including but not limited to phone number, fax number, email address, correspondence address and residential address); and
    f. information about the products and/or services the customer has purchased or applied, including the distribution channels (including their individual advisers or intermediaries) through which the products and/or services were purchased or applied for.

7.2. Manulife will not so provide the data unless it has received the customer's consent (which includes an indication of no objection) to the intended provision.

8. Under the Ordinance, a data subject has the right to:
    a. request access to his or her personal data;
    b. request correction of any of his or her personal data which is inaccurate;
    c. ascertain and obtain a data user's policies and practices in relation to personal data;
    d. be informed of the kind of personal data held by the data user;
    e. be informed of the main purposes for which personal data held by the data user are or are to be used; and
    f. make data access request and data correction request through the channel set out in paragraph 9 below.

9. Manulife has the right to charge a reasonable fee for processing any data access request as provided under the Ordinance. Requests for access and correction of data or for information regarding Manulife's policies and practices and kinds of data held should be addressed to the Privacy Officer at:

Manulife (International) Limited
22/F., Tower A, Manulife Financial Centre, 223-231 Wai Yip Street,
Kwun Tong, Kowloon, Hong Kong.

Manulife Provident Funds Trust Company Limited
22/F., Tower A, Manulife Financial Centre, 223-231 Wai Yip Street,
Kwun Tong, Kowloon, Hong Kong.

Manulife Investment Management (Hong Kong) Limited
23/F., Manulife Tower, One Bay East,
83 Hoi Bun Road, Kwun Tong, Kowloon, Hong Kong

Manulife Global Fund, Manulife Advanced Fund SPC, or any of other Manulife Funds
23/F., Manulife Tower, One Bay East,
83 Hoi Bun Road, Kwun Tong, Kowloon, Hong Kong

Updates and Changes

Manulife reserves the right, at any time and without prior notice, to add, revise, update or modify this Notice, by notifying customers of such addition, revision, update or modification. If Manulife decides to change this Notice (or its equivalent), Manulife shall notify customers on the company's website or in writing so that they are aware of the information that is collected, how that information may be used and under what circumstances that information is disclosed. Any such revision, update or modification will be effective immediately upon posting or as otherwise specified by Manulife.

Important Note: For customers located within the borders of the People's Republic of China (excluding Hong Kong, Macao, and Taiwan for the purpose of this Notice), please be aware that a specific "Privacy Addendum for Personal Information Protection Law (For Mainland Chinese)" ("**Privacy Addendum**") is applicable. This Privacy Addendum is available and can be accessed on Manulife's website: https://www.manulife.com.hk/en/individual/privacy-policy/privacy-addendum-for-personal-information-protection-law.html

This Notice is provided in multiple languages to ensure all customers are fully aware of Manulife's practices and standards regarding personal information handling. In the event of any discrepancies between the translations, the English version will prevail.

有關《個人資料（私隱）條例》的客戶通知 「**通知**」

定義

1. 本通知中使用的「**查閱資料要求**」，「**改正資料要求**」，「**資料當事人**」，「**資料使用者**」，「**直接促銷**」，「**核對程序**」及「**個人資料**」，具有《條例》中規定的含義。

   就本通知而言：

   「**客戶**」於本通知之的目下，指資料當事人，包括（但不限於）現有及潛在保單持有人，受保人，受益人或指定或有權獲得保單下的款項及 / 或其他利益的其他人士；及職業退休計劃下的成員；及強積金計劃下的計劃成員；及投資基金的股份 / 單位持有人；以及任何宏利可能收集個人資料的個體，不論他們目前是否持有保單或與宏利有正式的業務關係。

   「**香港**」指香港特別行政區。

   「**宏利**」指與各自客戶相關的宏利人壽保險（國際）有限公司，宏利公積金信託有限公司，宏利投資管理（香港）有限公司或某一宏利基金（視情況而定）。

   「**宏利基金**」指由宏利集團的某一成員不時所發起或管理的任何投資基金（包括但不限於宏利環球基金及宏利盈進基金 SPC），而「宏利基金」指所有此等投資基金。

   「**宏利集團**」指宏利金融有限公司及其不時的子公司和關聯公司（其中包括但不限於宏利人壽保險（國際）有限公司，宏利公積金信託有限公司，宏利投資管理（香港）有限公司）及宏利基金。宏利集團每一成員於本通知下的權利和義務，均為單獨而非連帶的。對於宏利集團另一成員的任何作為或不作為，宏利集團的任何其他成員概不承擔任何責任。

   「**條例**」指《個人資料（私隱）條例》（第 486 章）。

收集

2. 客戶需要不時向宏利提供個人資料用於各種目的，包括但不限於為建立或持續互動，或提供產品或服務。向宏利提供個人資料與否純屬個人意願，但若果未能提供該等資料可能導致宏利無法建立或延續其來往，或無法提供產品或服務。

3. 在平常的互動過程中（例如，申請變更保單下的受益人 / 受保人；或僱主通知變更參與職業退休計劃 / 強積金計劃的僱員成員的僱用情況 / 地址；或投資基金聯合股份持有人申請基金轉換）宏利亦會從客戶，代表客戶行事的人士以及其他可供宏利獲取資料的來源收集或獲得個人資料。

目的

4. 取決於客戶與宏利的關係性質，使用客戶個人資料的目的各有不同。該等目的可能包括：
   a. 處理，評估，確定和審批客戶對產品及 / 或服務的申請或要求；
   b. 向客戶提供服務，包括但不限於執行，顧問，投資管理，維持，聯絡，管理和運作向客戶提供的產品及 / 或服務，包括但不限於確認所收集資料的準確性；
   c. 確認客戶身份並識別客戶；
   d. 處理任何醫療，擔保，資格審查及評保檢查；
   e. 了解客戶的財務狀況，例如理解，評估客戶的財務偏好和需求，評估客戶申請，評估宏利所承擔的風險，以及處理審核提交給宏利的理賠；
   f. 與客戶提出，針對客戶提出或在其他方面涉及客戶的，與任何產品及 / 或服務相關的任何索賠有關的任何目的。這些情況下，宏利可能會收集，使用和披露相關個人資料，其中包括但不限於提出該等索賠，就其進行辯護，分析，調查，處理，評估，確定和應對。除了與此類索賠相關的必要處理程序外，宏利亦可應用相關資料進行偵測和防止欺詐行為，無論是否與申請而發出的保單有關；
   g. 根據客戶在宏利持有的帳戶的條款和條件提供投資管理服務，交易和顧問服務，託管服務和其他服務；
   h. 履行及 / 或行使由宏利或宏利的商業合作夥伴向客戶所提供與產品及 / 或服務相關的任何權利，職責和活動，包括但不限於市場推廣（請參閱下文「**在直接促銷中使用 / 將其個人資料提供予其他人士**」部分），審計，報告，研究，分析，再保險以及一般服務和維持網上及其他服務；
   i. 為客戶研究及 / 或設計產品及 / 或服務，宣傳，改進和改善產品及 / 或服務的提供；
   j. 不時就本條款所列的任何目的開展核對程序，核對所持有與客戶有關的任何資料，無論是否為了對客戶採取不利行動，例如拒絕申請；
   k. 根據及 / 或遵守，不論強制或自願性質，任何現有或將來的法律，法規，規章，判決，法院命令，制裁制度，守則或指引，指令，要求或承諾或安排，無論在香港境內或境外，包括但不限於披露及 / 或遵守任何法院，法律，監管，政府，行政（信貸資料服務機構或審計機構），稅務，執法機構或其他機構或自律監管或行業組織或協會或聯會或與宏利集團有約束力的等類似組織（統稱為「**權力機構**」）；
   l. 為遵守關於由於宏利或宏利集團任何成員在相關權力機構所在的司法管轄區或涉及該等司法管轄區的財務，商業，業務或其他利益或活動的任何合同，其他承諾或安排；
   m. 用於經營目的，信貸評估，信貸評分模型或統計分析（每項均包括行為分析以及對與宏利集團之間總體關係的評估，其中包括為遵守關於在宏利集團內部共用資料和資訊的任何義務，要求，政策，程序，措施或安排而使用該等資料，及 / 或根據宏利內任何有關遵守制裁或防止或發現洗錢，為恐怖分子提供資金或其他非法活動的計劃而對資料和資訊進行的其他使用），無論是針對資料當事人還是其他人的；
   n. 行使宏利在向客戶提供產品及 / 或服務方面可能享有的任何權利，包括但不限於行使任何代位權利（如適用）；
   o. 核查和進行身份及 / 或信貸及 / 或債務托收；
   p. 確定應向客戶支付或客戶應付的任何債務金額，向客戶或向為客戶債務提供任何擔保或承諾的任何人收取和追討任何應收金額；
   q. 使宏利或宏利集團任何成員的權利或業務的實際或擬議受讓人，承讓人，參與人或次級參與人能對該等轉讓，參與或次級參與擬涉及的交易進行評估及 / 或進行盡職調查；
   r. 宏利提供或將提供的任何特定服務或產品中具體規定的目的；
   s. 與上述相關的任何目的（包括尋求專業意見），或根據宏利或宏利集團任何成員的一般政策進行的，與保險，職業退休計劃，強積金計劃，投資基金，財富管理服務以及宏利或宏利集團任何成員不時向客戶提供的通知，通告或其他條款和條件中所述的其他金融產品和服務相關的任何其他目的。

承轉人

5. 宏利持有的客戶個人資料將予以保密，但受制於任何適用的法律，宏利可就上文第 4 條所載的任何目的將該等資料移轉給下列各方（無論在香港境內還是境外）：
   a. 與客戶，針對客戶或涉及客戶就宏利所提供的任何產品及 / 或服務提起的任何索賠相關的任何人士；
   b. 向宏利或宏利集團任何成員提供與業務經營相關的行政管理，財務諮詢，法律顧問，電信通訊，電腦，資訊技術，付款，證券結算，債務追討，資料處理或儲存，市場推廣（包括直接促銷服務），郵寄，列印，電話行銷，電話客戶服務中心，客戶滿意度分析，分發，公布，研究或其他服務的任何代理，承辦商，或第三方服務供應商（及其員工），包括任何託管人，執行人，投資管理人，投資顧問或分銷商；
   c. 任何信貸資料服務機構或（如出現付款違約）任何債務托收機構；
   d. 由宏利授權的任何顧問， 理算人，或中介人士 / 機構，包括其僱員，經銷宏利的產品及 / 或服務；
   e. 宏利或宏利可能委任代表的再保險商，私家調查員，醫院，診所，化驗所，技術人員，保險商和醫療服務供應商，理賠師，法律顧問和財務顧問；
   f. 慈善或非牟利機構；
   g. 客戶的僱主；

h. 第三方財務機構，保險公司，信用卡公司，證券及投資服務供應商，第三方獎賞，顧客忠誠，合作品牌或優惠計劃供應商或商號，或已向宏利或宏利集團任何成員承諾將對該等資料保密的任何人士；
i. 宏利或宏利集團的權利或業務的任何實際或擬議受讓人，承讓人，參與人或次級參與人；
j. 被確定為宏利集團的任何成員之一，包括其子公司和關聯公司；
k. 宏利的商業合作夥伴（請參閱下文「**個人資料在直接促銷中的使用 / 提供個人資料作直接促銷**」部分）；
l. 任何權力機構；
m. 整合保險業中索和承保資料的組織，防欺詐組織，其他保險公司（無論是直接地，或是通過防欺詐組織或本段中指名的其他人士），警察，和保險業就現有資料而對所提供的資料作出分析和檢查的數據庫或登記冊（及其運營者）；及
n. 有關售賣或轉讓宏利或任何宏利集團成員的全部或部分業務或產品，保單或其他資產組合，或任何有關該項售賣或轉讓的建議或已確定交易的任何其他人士。

個人資料在直接促銷中的使用

6. 宏利擬在下列類別的產品和服務的直接促銷中不時使用客戶的個人資料：
   a. 保險，公積金及 / 或公積金計劃，投資基金，財富管理服務或其他金融產品和服務；
   b. 獎勵，忠誠度或特權計劃及相關產品和服務；及
   c. 宏利集團任何成員的合作品牌夥伴的產品和服務（合作品牌夥伴名稱見相關產品和服務（視情況而定）的申請表）。

6.1. 在該等直接促銷中，僅可使用下列類型的客戶個人資料：
   a. 姓名；
   b. 性別；
   c. 出生日期；
   d. 身份證件號碼的一部分；
   e. 聯絡資料（包括但不限於電話號碼，傳真號碼，電郵地址，通訊地址及住宅地址）；及
   f. 客戶已購買或申請的產品及 / 或服務的資料，包括購買或申請的產品及 / 或服務的分銷渠道（包括其個人顧問或中介機構）。

6.2. 除非宏利已經就擬議使用獲得客戶的同意（其中包括無異議的表示），否則不得如上所述使用資料。

提供個人資料作直接促銷

7. 宏利擬向宏利集團（除宏利本身之外）不時提供客戶的個人資料供宏利集團就下列產品和服務作直接促銷之用，以換取金錢和其他財產：
   a. 保險，公積金及 / 或公積金計劃，投資基金，財富管理服務或其他金融產品和服務；
   b. 獎勵，忠誠度或特權計劃及相關產品和服務；及
   c. 宏利集團任何成員的合作品牌夥伴的產品和服務（該等合作品牌夥伴名稱見相關產品和服務（視情況而定）的申請表）。

7.1. 僅可向宏利集團（除宏利本身之外）提供下列類型的客戶個人資料供宏利集團作該等直接促銷之用：
   a. 姓名；
   b. 性別；
   c. 出生日期；
   d. 身份證件號碼的一部分；
   e. 聯絡資料（包括但不限於電話號碼，傳真號碼，電郵地址，通訊地址及住宅地址）；及
   f. 客戶已購買或申請的產品及 / 或服務的資料，包括購買或申請的產品及 / 或服務的分銷渠道（包括其個人顧問或中介機構）。

7.2. 除非宏利已就擬議提供獲得客戶的同意（其中包括無異議的表示），否則不得如上所述提供資料。

8. 根據《條例》，資料當事人有權：
   a. 要求查閱其個人資料；
   b. 要求對其任何不準確的個人資料進行改正；
   c. 查明和取得資料使用者在個人資料方面的政策和慣例；
   d. 了解資料使用者持有的個人資料類型；
   e. 了解資料使用者持有的個人資料的主要目的或主要擬議目的；及
   f. 通過下文第 9 條所載的渠道提出查閱資料要求和改正資料要求。

9. 根據該條例的規定，宏利有權就處理任何資料查閱要求收取合理費用。 訪問和更正個人資料的要求或有關宏利的政策和慣例以及宏利持有的個人資料信息，應提交至以下地址給個人資料主任：

   宏利人壽保險（國際）有限公司
   香港九龍觀塘偉業街 223-231 號宏利金融中心 A 座 22 樓

   宏利公積金信託有限公司
   香港九龍觀塘偉業街 223-231 號宏利金融中心 A 座 22 樓

   宏利投資管理（香港）有限公司
   香港九龍觀塘海濱道 83 號宏利大樓 23 樓

   宏利環球基金，宏利盈進基金 SPC，或任何其他宏利基金
   香港九龍觀塘海濱道 83 號宏利大樓 23 樓

更新及變更

宏利保留可隨時並在無須事先通知的情況下增添，修改，更新或修訂本聲明的權利，並僅會知會客戶有關增補，修改，更新或修訂。倘宏利決定修改此通知（或其相等文件），宏利將於公司網站上或以書面形式知會客戶有關更改，以便客戶知悉宏利所收集的資料，該資料如何使用及在何種情況下會披露該資料。任何有關修改，更新或修訂將在刊登後或宏利另行指定時即時生效。

重要提示：對於位於中華人民共和國境內（為本通知目的，不包括香港，澳門及台灣）的客戶，特定的《有關 < 中華人民共和國個人信息保護法 > 的私隱附錄 (為內地居民設定)》(「**私隱附錄**」) 將為適用。此私隱附錄可在宏利的網站上獲取和查閱：https://www.manulife.com.hk/zh-hk/individual/privacy-policy/privacy-addendum-for-personal-information-protection-law.html

為確保所有客戶充分了解關於宏利的個人信息處理的做法和標準，本通知提供多種語言版本。若翻譯版本之間有任何歧義，將以英文版本為準。

☐ Please tick the box if you do not agree to provide your consent for (i) eMPF Platform Company Limited to transfer your personal data to the Trustee of the MPF scheme in which you enrol; and (ii) such Trustee to transfer your personal data to the MPF scheme provider of the MPF scheme in which you enrol for direct marketing purposes in accordance with (a) the Personal Information Collection Statement of eMPF Platform Company Limited; and (b) the Personal Information Collection Statement of such Trustee. 若你不同意 (a) 積金易平台有限公司根據其收集個人資料聲明及 (b) 你所登記的強積金計劃受託人根據其收集個人資料聲明部分 (i) 轉移你的個人資料予你所登記的強積金計劃的受託人，及 (ii) 該受託人轉移你的個人資料予你所登記的強積金計劃的強積金計劃營辦人，作直接促銷之用途，請在方格內填上剔號。

G. AUTHORIZATION AND DECLARATION 授權及聲明

By signing this agreement, the Participating Employer ("I / We") 在簽署本協議，參與僱主 (下稱「本人／我們」) :

1. I / We hereby covenant with the Trustee to comply with and be bound by the provisions of the Trust Deed, the Rules (if applicable to the Scheme), this agreement and all applicable laws and regulations of Hong Kong Special Administrative Region of the People's Republic of China. I / We hereby covenant to perform any act or pay any sum required by law to be done or paid by me / us as a Participating Employer for the purposes of the Scheme. By execution of this agreement, I / we as the Participating Employer hereby give to the Trustee such covenants, warranties, undertaking and indemnities as required by the provisions of the Trust Deed. 本人／我們謹與受託人契諾遵守信託契約 (或稱信託契據)、規則 (如適用於本計劃)、本協議及中華人民共和國香港特別行政區所有適用法例與法規內之條款並受其約束。本人／我們作為本計劃的參與僱主謹承諾履行任何有關法律規定或支付任何有關款項。通過簽署本協議，本人／我們作為參與僱主按有關信託契約 (或稱信託契據) 之要求謹此向受託人提供契諾、保證、承諾及賠償。
2. I / We confirm that I / we have received, read and understood the terms / contents of: 本人／我們確認已收到、閱讀及明白以下條款／內容：
   (i) the General Terms and Conditions of the eMPF Platform; and 積金易平台一般條款及細則；及
   (ii) the latest MPF Scheme Brochure and the KSID of the Scheme and thoroughly understand the features, benefits and charges of the Scheme; and 本計劃最新的強積金計劃說明書及主要計劃資料文件，並充分瞭解有關本計劃的特點、權益及收費；及
   (iii) the PICS of the eMPF Platform and the Scheme as set out in this agreement relating to the use and disclosure of my / our personal information by the eMPF Platform / the Trustee, I / we confirm that my / our personal information may be used and disclosed for the purposes and to the persons as stated in the PICS; and 本協議所載的積金易平台及本計劃「聲明」有關積金易平台／受託人使用及披露本人／我們的個人資料，本人／我們確認本人／我們的個人資料可按「聲明」所述的目的使用及披露，及向所指明的人士披露；及
   (iv) the Important Notes in this agreement. 本協議的重要事項。
3. I / We acknowledge and agree that the information in Part E will be updated by the eMPF Platform for all my / our MPF account(s) maintained in the eMPF Platform for the purpose of AEOI and CRS. 本人／我們知悉及同意 E 部分的資料將會更新本人／我們於積金易平台保存的所有強積金帳戶用作自動交換財務帳戶資料及「共同匯報標準」的用途。
4. Pursuant to the legal provisions for AEOI provided under the Inland Revenue Ordinance (Cap. 112), I / we acknowledge and agree that: 根據《稅務條例》(第 112 章) 有關自動交換財務帳戶資料的法律條文，本人／我們知悉及同意：
   (i) the information contained in this agreement (which includes any additional sheet(s)) is collected and may be kept by the eMPF Platform / the Trustee for the purpose of AEOI; and 積金易平台／受託人可收集本協議 (包括任何額外紙張) 所載資料並可備存作自動交換財務帳戶資料用途；及
   (ii) such information and information regarding the account holder and any reportable account(s) may be reported by the Trustee to the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region and exchanged with the tax authorities of another jurisdiction or jurisdictions in which the account holder may be resident for tax purposes; and 受託人可把該等資料及關於帳戶持有人及任何須申報帳戶的資料向香港特別行政區政府稅務局申報，從而把資料轉交到帳戶持有人的居留司法管轄區的稅務當局；及
   (iii) I / we agree to the obligation that the account holder must comply with requests made by the eMPF Platform / the Trustee to comply with the CRS (AEOI) requirements under the Inland Revenue Ordinance and / or applicable law and regulation, and such obligation forms the basis of the account to be opened. 本人／我們同意帳戶持有人必須遵守積金易平台／受託人的要求以便遵守《稅務條例》及／或適用法律及規例的 CRS (AEOI) 規定，並為日後開立帳戶之基礎。
5. I / We undertake to advise the eMPF Platform / the Trustee of any change in circumstances which affects the tax residency status of the entity / individual (if Employer is a sole proprietorship) identified in Part E or causes the information provided herein to become incorrect, inaccurate or incomplete, and to provide the eMPF Platform / the Trustee with a suitably updated self-certification within 30 days of such change in circumstances. 本人／我們承諾，如情況有所改變，以致影響於 E 部分所述的實體／個人 (如僱主屬獨資經營者) 的稅務居民身分，或引致提供的資料不正確、不準確或不完整，本人／我們會通知積金易平台／受託人，並會在情況發生改變後 30 天內，向積金易平台／受託人提交一份已適當更新的自我證明。
6. I / We hereby authorize any government office or any organisation or persons who has any records, information of me / us to disclose, release or transfer to the Trustee or its representatives such record or information required for processing this application and for administration of the Scheme upon request by the eMPF Platform / the Trustee or its representatives. 本人／我們特此授權持有本人／我們任何紀錄、資料的任何政府辦事處、團體或個人，在積金易平台／受託人或其代表要求下，可向該受託人或其代表透露、發放或轉移就處理本申請及管理本計劃有關的該等紀錄或資料。
7. I / We declare that the information given and statements made in this agreement (which includes any additional sheet(s)) are, to the best of my / our knowledge and belief, true, correct and complete. I / We further undertake that if there is any change in the information so provided, I / we shall notify the eMPF Platform / the Trustee of such change as soon as reasonably practicable. 本人／我們聲明，盡本人／我們所知所信，本協議 (包括任何額外紙張) 內所載資料及聲明均屬真實、正確及完整。本人／我們進一步承諾，如果所提供的資料有任何改變，本人／我們會在合理而切實可行範圍內儘快通知積金易平台／受託人。
8. I / We understand that if I / we fail to supply complete information as required in this agreement, the eMPF Platform / the Trustee may not be able to establish my / our Participating Employer MPF account and / or Member MPF account. 本人／我們明白，如果本人／我們未能提供本協議內所需的所有資料，積金易平台／受託人可能無法建立本人／我們的參與僱主強積金帳戶及／或成員強積金帳戶。
9. I / We agree to provide the eMPF Platform / the Trustee with any additional documents and information as the eMPF Platform / the Trustee may reasonably require in order to enable the eMPF Platform / the Trustee to comply with the Anti-Money Laundering and Counter-Terrorist Financing Ordinance and the relevant requirements of the MPF legislation. I / We understand the eMPF Platform / the Trustee reserve(s) the right to request for such documents and information as it deems appropriate for the purpose of complying with regulatory requirements and conducting client identification and due diligence before completing the application. The eMPF Platform / The Trustee may refuse to complete this application if such documents or information are not provided to the satisfaction of the eMPF Platform / the Trustee. 本人／我們同意在合理情況下向積金易平台／受託人提供一切所需／額外文件及資料，使積金易平台／受託人能遵守《打擊洗錢及恐怖分子資金籌集條例》及強積金法例下的有關規定。本人／我們明白積金易平台／受託人保留權利在完成申請前索取其認為合適的任何文件及資料，以作遵守監管規定和進行客戶身分辨認及盡職審查之目的。如所提供的該等文件或資料未能令積金易平台／受託人滿意，積金易平台／受託人可拒絕本申請。
10. I / We acknowledge that I / we have identified each connected person stated in this agreement (if applicable) and verified his / her identity on the basis of documents, data or information (including the HKID Card) provided by a governmental body, a relevant authority or any other reliable and independent source that is recognized by the relevant authority. 本人／我們確認已識別本協議所填寫的每位關連人士 (如適用) 的身分以及根據由政府機構、有關當局或有關當局認可的任何其他可靠及獨立來源所提供的文件、數據或資料 (包括香港身份證) 核實其身分。
11. I / We certify that the authorized signatories hereunder are duly authorized to execute this agreement for and on behalf of the Participating Employer. 本人／我們確認，本協議的獲授權簽署人被正式授權代表參與僱主執行本協議。

12. In the absence of wilful default, gross negligence or fraud, I / we agree to indemnify and keep the eMPF Platform / the Trustee indemnified against any and all losses, costs, expenses, actions, proceedings suffered by the eMPF Platform / the Trustee related to my / our participation in the Scheme. 在沒有故意失責、嚴重疏忽或欺詐外的情況下，倘若積金易平台／受託人因執行本人／我們參加本計劃的事宜，而導致積金易平台／受託人需要承擔任何及所有損失、成本、費用或招致任何行動或訴訟，本人／我們同意作出有關賠償予積金易平台／受託人。

Authorized Signature(s) ▽ with Company Chop (If applicable)
授權簽署 ▽ 及公司印章 (如適用)

	Name 姓名 (As shown on HKID Card / Passport 與香港身份證／護照上的姓名相同) : ______
	Capacity ▼ 身分 ▼ : ______
	HKID Card / Passport No. 香港身份證／護照號碼 : ______
	Nationality 國籍 : ______
Date 日期 ______ DD 日 / MM 月 / YYYY 年	Residential Address 住址 : ______
	Email Address 電郵地址 : ______

▽ This agreement must be signed by the Company Director(s) for Corporation; by the Partner(s) for Partnership; by the Sole Proprietor for Sole Proprietorship; or by the ultimate owner / controller for other types of organisation. The person who provided authorized signatory in this part is deemed to be one of the Scheme Authorized Person(s) of the company, this signature specimen will be used to verify the correspondences in relation to the MPF account of the Scheme. If this agreement is not signed by the respective person as listed above, please provide his / her Authorization Letter or the concerned Board Resolution. 就法團而言，本協議必須由公司董事簽署；合夥經營，須由合夥人簽署；獨資經營，須由獨資經營者簽署；或其他類別的機構，則須由最終擁有人／管理人簽署。於本部分提供授權簽署的人士將被視為公司其中一位計劃獲授權人，此簽署將用於驗證於本計劃強積金帳戶的相關文件。如本協議並非由上述相關人士簽署，請提供其授權書或相關董事局決議。

▼ Please indicate the capacity in which you are signing this agreement, e.g. Company Director(s) for Corporation, Partner(s) for Partnership, Sole Proprietor for Sole Proprietorship, or the ultimate owner / controller for other types of organisation. 請說明你簽署本協議的身分。例如：法團的董事、合夥經營的合夥人、獨資經營的獨資經營者、或其他類別的機構的最終擁有人／管理人。

✦ Warning 警告 :
Pursuant to section 43E of the Mandatory Provident Fund Schemes Ordinance (Cap. 485), a person who, in any document given to (i) the MPFA, (ii) a system operator of the eMPF Platform, or (iii) an approved trustee, knowingly or recklessly makes a statement which is false or misleading in a material respect commits an offence and is liable to a maximum penalty of a HKD100,000 fine and 12 months' imprisonment on the first conviction and a HKD200,000 fine and two years' imprisonment on each subsequent conviction. A person who knowingly and wilfully makes (otherwise than on oath) a statement false in a material particular also commits an offence under section 36 of the Crimes Ordinance (Cap. 200) and is liable on conviction to imprisonment for two years and to a fine. 根據《強制性公積金計劃條例》(第 485 章) 第 43E 條，任何人在給予 (i) 積金局，(ii) 積金易平台的系統營運者，或 (iii) 核准受託人的任何文件中，明知或罔顧後果地作出在要項上屬虛假或具誤導性的陳述，即屬犯罪。首次定罪者，最高可處罰款港幣 100,000 元及監禁十二個月；其後每次定罪，最高可處罰款港幣 200,000 元及監禁兩年。根據《刑事罪行條例》(第 200 章) 第 36 條，任何人明知而故意在非經宣誓的情況下在要項上作出屬虛假的陳述，亦屬犯罪。一經定罪，可處監禁兩年及罰款。

CHECKLIST OF APPLICATION DOCUMENTS 申請文件清單

MPF account setup may be affected if you do not submit all required document(s) and information. The Trustee reserves the right to request additional information and documents for the purpose of complying with regulatory requirements. 如你未能提供全部所需文件及資料，可能會影響開立此強積金帳戶。受託人保留索取更多資料及文件的權利，以作遵守監管規定之目的。

	Required Documents 所需文件	Limited Company 有限公司	Sole Proprietor / Partnership 獨資公司／合夥公司	Other types of organisation 其他類別的機構
1	Copy of Business Registration Certificate 商業登記證之副本	✓	✓	N/A 不適用
2	Copy of Certificate of Incorporation / Certificate Registration of Non-Hong Kong Company or equivalent 公司註冊證書／非香港公司註冊證明書或同等文件之副本	✓	N/A 不適用	✓
3	Copy of Certificate to identify the business type issued by official bodies 由官方機構發出用於識別業務類別的證明之副本	N/A 不適用	N/A 不適用	✓
4	Copy of HKID Card / Passport of Scheme Authorized Person(s) 計劃獲授權人的香港身份證／護照之副本	✓	✓	✓
5	Copy of HKID Card / Passport of Sole Proprietor 獨資經營者的香港身份證／護照之副本	N/A 不適用	✓ (Applicable for Sole Proprietor 適用於獨資經營者)	N/A 不適用
6	Copy of Company Search Report / latest Annual Return 公司查冊／最新周年申報表之副本	✓	N/A 不適用	N/A 不適用
7	Copy of Memorandum & Articles of Association / Copy of Constitution or equivalent 公司組織章程大綱及細則之副本／組織章程或同等文件之副本	✓	N/A 不適用	✓
8	List of "Persons Purporting to Act" / Authorized Signatories 獲授權代表行事／簽名的人員名單	✓	✓	✓
9	List of Partner(s) 合夥人名單	N/A 不適用	✓ (Applicable for Partnership 適用於合夥公司)	N/A 不適用
10	Copy of Partnership Deed / Evidence of Unincorporated Body 非法人團體的合夥契約／證明之副本	N/A 不適用	✓ (Applicable for Partnership 適用於合夥公司)	N/A 不適用
11	The latest Electronic Extract of information / Certified Extract of information on the Business Register issued by the Business Registration Office 由商業登記署發出最新的商業登記冊內資料的電子摘錄／資料摘錄的核證本	N/A 不適用	✓	N/A 不適用
12	Copy of minutes of meeting or document to proof capacity of signatory 會議記錄或證明簽署人身分的文件之副本	N/A 不適用	N/A 不適用	✓
13	Copy of Board Resolutions / Written Authorization / Equivalent documents to prove committee member list or to show the person is authorized to represent the employer 董事會決議／授權書之副本／可用以證明委員會成員名單或證明該人獲授權代表僱主的同等文件	✓	✓	✓
14	Certificate of incumbency or equivalent certified by a professional third party 由專業第三方認證的職權證明書或同等文件	N/A 不適用	N/A 不適用	✓ (Applicable for Overseas Company 適用於海外公司)
15	Tax Residency Self-Certification (Controlling Person) 稅務居民身分自我證明 (控權人) (If applicable 如適用)	✓	✓ (Applicable for Partnership 適用於合夥公司)	✓

Note 註 :

Certified true copies should be certified by any of the following personnel: 認證副本必須經由下列人士認證：

(i) a certified public accountant / lawyer / notary public / professional company secretary acceptable to entities of the Trustee of the Scheme; or 任何本計劃受託人認可的執業會計師／律師／公證人／專業公司秘書；

(i) a person from any designated channels acceptable by the Trustee of the Scheme. For details, please contact the Trustee via its website / hotline. 任何本計劃受託人認可的指定人士，請透過受託人網頁／熱線聯絡受託人查詢詳情。

Submission Channels 遞交途徑	Enquiries 查詢
1. Post: PO Box 98929 Tsim Sha Tsui Post Office 郵寄 : 尖沙咀郵政局郵政信箱 98929 號 2. Drop-in Box in any one of the eMPF Service Centres below 下列任何一間積金易服務中心的投遞箱 3. Email address * 電郵地址 * : forms@support.empf.org.hk 4. Fax * 傳真 * : 3197 2988 Please do **NOT** submit duplicate copies to avoid duplication. **請勿**遞交相同表格，以免重複。	1. eMPF Customer Service Hotline 積金易客戶服務熱線 : 183 2622 2. Email address 電郵地址 : enquiry@support.empf.org.hk 3. Fax 傳真 : 3197 2922

eMPF Service Centres Address & Service Hours 積金易服務中心地址及服務時間

Hong Kong Island 香港島	Kowloon 九龍	New Territories 新界
Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong 香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室	Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon 九龍尖沙咀東部麼地道 77 號華懋廣場 12 樓 1205-6 室	Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories 新界荃灣楊屋道 8 號如心廣場第 2 座 18 樓 1802A 室

Service Hours 服務時間 :

Monday to Friday	星期一至五	9:00 am – 6:00 pm	上午 9 時 至 下午 6 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

eMPF Customer Service Hotline Service Hours 積金易客戶服務熱線服務時間

Monday to Friday	星期一至五	9:00 am – 7:00 pm	上午 9 時 至 下午 7 時
Saturday	星期六	9:00 am – 1:00 pm	上午 9 時 至 下午 1 時
Sunday & Public Holiday	星期日及公眾假期	Closed 休息	

* Not applicable for submission of certified true copy (if any). 不適用於遞交認證副本 (如有)。

MPF INTERMEDIARY DETAILS 強積金中介人資料 (For MPF Intermediary Use Only 只供強積金中介人填寫)

Intermediary Name 1 中介人名稱 1 ______________	Intermediary Name 2 中介人名稱 2 ______________
MPF Registration No. 強積金註冊編號 ______________	MPF Registration No. 強積金註冊編號 ______________
Agent / Broker Code. 經紀／代理人編號 ______________	Agent / Broker Code. 經紀／代理人編號 ______________