

**To 致: HSBC Provident Fund Trustee (Hong Kong) Limited**

c/o The Hongkong and Shanghai Banking Corporation Limited 香港上海滙豐銀行有限公司  
 PO Box 73770 Kowloon Central Post Office 九龍中央郵政信箱73770號  
 or place to the MPF drop-in box at designated HSBC branches  
 或投放於指定滙豐分行的強積金寄存辦理箱  
 HSBC MPF Employer Hotline 滙豐強積金僱主熱線: 2583 8033  
 HSBC MPF Member Hotline 滙豐強積金成員熱線: 3128 0128


**HSBC MANDATORY PROVIDENT FUND  
 MEMBER TRANSFER FORM  
 滙豐強積金: 成員轉移通知書**
**Note 注意:**

- Please complete in CAPITAL and BLOCK LETTERS and tick ✓ the appropriate box(es). 請用大楷及正楷填寫，並於適當的方格內加上「✓」號。
- The New Employer should lodge with the transferee trustee in writing for the election of member transfer. Please return the completed form together with the 'Employer's Request for Fund Transfer Form [Form MPF(S)-P(E)]' (INPE) form. 新僱主應以書面通知承轉受託人其成員轉移選擇，請把填妥的表格連同「僱主資金轉移申請表 [表格 MPF(S)-P(E)]」(INPE) 一併交回。
- For Member transferring between different MPF master trust schemes, please complete an 'Employee Application Form' (IN61) to enroll into the New Employer's MPF scheme. 如成員於不同的強積金集成信託計劃之間轉移，請另行填寫「僱員申請表」(IN61) 以參加新僱主的強積金計劃。
- The Default Investment Strategy ("DIS") is a ready-made investment arrangement mainly designed for those members who are not interested or do not wish to make an investment choice, and is also available as an investment choice itself, for members who find it suitable for their own circumstances. For those members who do not make an investment choice, their future contributions and accrued benefits transferred from another Registered Scheme will be invested in accordance with the DIS. The DIS aims to balance the long term effects of risk and return through investing in two Constituent Funds, namely the Core Accumulation Fund and the Age 65 Plus Fund, according to the pre-set allocation percentages at different ages. The DIS will manage investment risk exposure by automatically reducing the exposure to higher risk assets and correspondingly increasing the exposure to lower risk assets as the member gets older. For further details of the DIS, please refer to the relevant 'MPF Scheme Brochure'. 「預設投資策略」是一項預先制訂的投資安排，主要為沒有興趣或不打算作出投資選擇的計劃成員而設計，而對於認為適合自身情況的成員來說，「預設投資策略」本身亦可作為一項投資選擇。計劃成員如沒有作出投資選擇，其未來供款及轉移自另一註冊計劃的累算權益將會按照「預設投資策略」來作出投資。「預設投資策略」透過於不同年齡按照預定配置百分比投資於兩項成分基金(即核心累積基金與65歲後基金)，旨在平衡長期風險與回報。「預設投資策略」將會隨著成員年齡增長而自動減少投資於較高風險資產，並相應增加投資於較低風險資產，藉此管理投資風險。有關「預設投資策略」的詳情，請參閱有關「強積金計劃說明書」。
- 'Registered Scheme' means a retirement benefits scheme registered under section 21 or 21A of the 'MPF Ordinance'. 「註冊計劃」指已根據《強積金條例》第21條或第21A條註冊的退休福利計劃。
- The information provided will be used in accordance with the relevant MPF Ordinance and/or its Regulations and the same manner as mentioned in the "Personal Information Collection Statement for HSBC Mandatory Provident Fund" ("PICS"). The PICS can be obtained through HSBC MPF website www.hsbc.com.hk/mpf or MPF hotline 2583 8033 (Employer) or 3128 0128 (Member). By signing this form, your present choice of receiving direct marketing information will remain unchanged. If you wish to update the use of your personal data for direct marketing purpose as stated in the PICS from the HSBC MPF scheme, you may exercise your right by notifying us. 所有已提供的資料將按照有關強積金條例及/或其規例及《滙豐強積金的收集個人資料聲明》(「聲明」)處理。該聲明可透過以下滙豐強積金網站www.hsbc.com.hk/mpf或強積金熱線2583 8033(僱主)或3128 0128(成員)索取。在簽署本表格後，你現時關於接收直接促銷資訊的選擇將維持不變。如你希望更新在滙豐強積金計劃聲明中使用你的個人資料作直接促銷的用途，你可通知我們行使你的選擇權。

**A. Member transfer details 成員轉移資料**

Member's full name (in English) 成員全名(英文) (same as that shown on your HKID card/Passport 與香港身分證/護照上的姓名相同)	HKID/Passport no. 香港身分證/護照號碼						
Date joined existing employer group 受僱於現僱主集團日期  <div style="text-align: center;"> <table border="1" style="margin: auto;"> <tr> <td style="width: 30px;">Year 年</td> <td style="width: 30px;">Month 月</td> <td style="width: 30px;">Day 日</td> </tr> </table> </div>	Year 年	Month 月	Day 日	Commencement date for vesting entitlement* 歸屬權益開始日期*  <div style="text-align: center;"> <table border="1" style="margin: auto;"> <tr> <td style="width: 30px;">Year 年</td> <td style="width: 30px;">Month 月</td> <td style="width: 30px;">Day 日</td> </tr> </table> </div>	Year 年	Month 月	Day 日
Year 年	Month 月	Day 日					
Year 年	Month 月	Day 日					

\* Please complete this date if it is different from the date joined existing employer group. 如此日期與受僱於現僱主集團日期不同，請填寫此欄。

**B. Existing employer details 現僱主資料**

Company name of existing employer 現僱主公司名稱	
Employer ID 僱主編號	Pay centre ID 付款中心編號 (if applicable 如適用)
Name of Trustee 受託人名稱 <input type="checkbox"/> HSBC Provident Fund Trustee (Hong Kong) Limited <input type="checkbox"/> Others, please specify 其他，請註明: _____	
Name of scheme 計劃名稱 <input type="checkbox"/> HSBC MPF – SuperTrust Plus 滙豐強積金智選計劃 <input type="checkbox"/> Others, please specify 其他，請註明: _____	

### C. New employer details 新僱主資料

Company name of new employer 新僱主公司名稱	
Employer ID 僱主編號	Pay centre ID 付款中心編號 (if applicable 如適用)
Effective date of transfer (i.e. date joined new employer) 轉移生效日(即受僱於新僱主日期)	Class no./Description (if applicable) 級別號碼/描述(如適用)
Name of Trustee 受託人名稱 <input type="checkbox"/> HSBC Provident Fund Trustee (Hong Kong) Limited <input type="checkbox"/> Others, please specify 其他, 請註明: _____	
Name of scheme 計劃名稱 <input type="checkbox"/> HSBC MPF – SuperTrust Plus 滙豐強積金智選計劃 <input type="checkbox"/> Others, please specify 其他, 請註明: _____	

### D. Declaration and authorisation 聲明及授權書

By signing this form, 在簽署本表格後，

I. the Existing Employer and the New Employer confirm that the above-named is a Member of the Existing Employer's MPF scheme and on commencement of his/her transfer of employment between associated companies or change of business ownership, will join the New Employer's MPF scheme. Two companies are taken to be associated companies if one is the subsidiary of the other or both are the subsidiaries of a further company.  
A company is the subsidiary of the other, if  
(a) that other company:  
(i) controls the composition of the board of directors of the first mentioned company; or  
(ii) controls more than half of the voting power of the first mentioned company; or  
(iii) holds more than half of the issued share capital of the first mentioned company (excluding any part of it which carries no right to participate beyond a specified amount in a distribution of either profits or capital); or  
(b) the first-mentioned company is a subsidiary of any company which is that other company's subsidiary;  
現僱主和新僱主確認上述人士為現僱主的強積金計劃之成員，並在他/她開始轉移受僱於另一間有聯繫公司或另一個新業務擁有人後，將參加新僱主的強積金計劃。如某公司是另一公司的附屬公司，或兩者同是一間公司的附屬公司，則該兩間公司須被視作為有聯繫公司。  
一間公司須被視作為另一間公司的附屬公司，如  
(a) 該另一間公司：  
(i) 控制首述的公司董事局的組成；或  
(ii) 控制首述的公司過半數的表決權；或  
(iii) 持有首述的公司的過半數已發行股本(所持股本中，如部分在分派利潤或資本時無權分享超過某一指明數額之數，則該部分不計算在該股本內)；或  
(b) 首述的公司是一間公司的附屬公司，而該間公司是上述另一間公司的附屬公司；

II. the New Employer hereby elects to transfer the Member's accrued benefits in the contribution account under the Existing Employer's MPF scheme to its own contribution account and agrees to recognise the Member's length of employment with the Existing Employer (including any former employers of the same employer group where applicable) for the purpose of making a severance payment or long service payment in accordance with the Employment Ordinance; and 新僱主現選擇將成員於現僱主的強積金計劃供款賬戶內持有的累算權益轉移至其供款賬戶內，並同意確認該成員與現僱主(包括所有屬於相同僱主集團之前僱主)之服務年期，作為計算根據僱傭條例須支付的遣散費或長期服務金的法律責任；及

III. the Existing Employer agrees to release the full amount of the Member's accrued benefits deriving from the Existing Employer's voluntary contributions to the New Employer's MPF scheme on the effective date of transfer shown above and the New Employer agrees to accept the Member's accrued benefits from the Existing Employer's MPF scheme to be credited to the Member's account under the New Employer's MPF scheme; and 現僱主同意於上述轉移生效日將成員全數由現僱主的自願性供款所得的累算權益轉移至該成員的新僱主之強積金計劃，而新僱主亦同意接收該成員在現僱主的強積金計劃之累算權益，並將其誌入該成員在新僱主的強積金計劃之成員賬戶；及

IV. the Existing Employer and the New Employer agree that, in order to determine the Member's vesting entitlement to voluntary contributions on final termination of the Member's employment with the New Employer, the Member's employment by the Existing Employer (including any former employers of the same employer group where applicable) and the New Employer shall be treated as continuous; and 現僱主和新僱主同意，當成員由現僱主(包括所有屬於相同僱主集團之前僱主)轉移受僱於新僱主後，該成員於最後終止受僱於新僱主時，就確定其自願性供款之歸屬權益而言，成員將被視作連續性受僱；及

V. the Member elects to transfer all his/her accrued benefits deriving from his/her own contributions from the Existing Employer's MPF scheme to the New Employer's MPF scheme and agrees to the release of all personal information from the Existing Employer to the New Employer for the purposes of processing the transfer and all subsequent services; and 成員選擇轉移他/她所有於現僱主的強積金計劃中由自己的供款所得的累算權益至新僱主的強積金計劃，並同意現僱主向新僱主提供其所有個人資料，以處理其轉移及所有相關手續；及

VI. the Member understands and agrees that his/her Flexi-Contributions (if any) in the Existing Employer's MPF scheme will continue in an independent Flexi-Contribution account under the current scheme, and his/her investment mandate of future contributions and accrued benefits transferred from another Registered Scheme of this independent Flexi-Contribution account will be the same as his/her investment mandate of the Flexi-Contribution account under the Existing Employer's MPF scheme, which can be DIS or own investment option, unless an independent Flexi-Contribution account exists at the time of transfer; and 成員明白和同意他/她於現僱主強積金計劃內的靈活供款(如有)將自動轉延至現有計劃內另一個獨立靈活供款賬戶，而該獨立靈活供款賬戶之未來供款及轉移自另一註冊計劃的累算權益的投資選擇將與他/她現僱主的強積金計劃內的靈活供款賬戶之未來供款及轉移自另一註冊計劃的累算權益的投資選擇相同，而投資選擇可以是「預設投資策略」或自選投資組合，除非於累算權益轉移時，已有此獨立靈活供款賬戶；及

VII. the Member understands, accepts and agrees to the rules of the New Employer's MPF scheme, including vesting scales, which he/she acknowledges may differ from the rules of the MPF scheme of the Existing Employer; and 成員明白、接受和同意新僱主的強積金計劃之規管條文，包括歸屬比例，他/她並認可有關條文可能會與現僱主的強積金計劃之規管條文不同；及

## D. Declaration and authorisation (cont'd) 聲明及授權書(續)

- VIII. the Member understands and accepts that his/her employment is considered continuous for the purpose of determining his/her vesting entitlement to voluntary contributions as per clause IV above and in consideration thereof understands and accepts that on final termination of his/her employment by the New Employer, the payment of a severance payment or long service payment by the New Employer in accordance with the Employment Ordinance may be offset against accrued benefits deriving from mandatory and voluntary contributions made by both the Existing Employer (including any former employers of the same employer group where applicable) and New Employer; and 成員明白和接受他/她被視作連續性受僱以確定他/她就以上條款IV所述自願性供款之歸屬權益，並因此明白和接受於他/她最後終止受僱於新僱主時，其新僱主可將現僱主(包括所有屬於相同僱主集團之前僱主)和新僱主曾作的強制性供款及自願性供款所得的累算權益，用以抵銷根據僱傭條例所須支付予他/她的遣散費或長期服務金；及
- IX. the Member (transferring within the same HSBC MPF master trust scheme) who has not submitted an Employee Application Form for the New Employer's MPF scheme, understands and agrees that his/her investment mandate of future contributions and accrued benefits transferred from another Registered Scheme of the account under the New Employer's MPF scheme will be the same as his/her investment mandate of future contributions and accrued benefits transferred from another Registered Scheme of the account under the Existing Employer's MPF scheme, which can be DIS or own investment option; and 成員(於相同的滙豐強積金集成信託計劃內轉移)在新僱主強積金計劃沒有遞交僱員申請表時，明白和同意他/她於新僱主的強積金計劃內的賬戶之未來供款及轉移自另一註冊計劃的累算權益的投資選擇將與他/她於現僱主的強積金計劃內的賬戶之未來供款及轉移自另一註冊計劃的累算權益的投資選擇相同，而投資選擇可以是「預設投資策略」或自選投資組合；及
- X. the Member (transferring within the same HSBC MPF master trust scheme) understands, accepts and agrees that his/her accrued benefits will be transferred from the Existing Employer's MPF scheme to the New Employer's MPF scheme; and 成員(於相同的滙豐強積金集成信託計劃內轉移)明白、接受和同意他/她於現僱主的強積金計劃之累算權益，將轉移至新僱主的強積金計劃；及
- XI. the Member understands, accepts and agrees if he/she is currently investing in a guaranteed fund, that the transfer may violate certain guarantee conditions and disqualify his/her entitlement to the relevant guarantee; and 成員明白、接受和同意如他/她現在的投資中包含保證基金，其轉移可能會違反部分保證條件，令他/她失去相關保證的資格；及
- XII. the Member confirms that he/she understands and accepts the following. In relation to transfer of accrued benefits in respect of the employees, from one account to another account within the same HSBC MPF scheme, the transfer of accrued benefits is effected by way of unit transfer without any redemption, regardless the investment allocation in new account. If you wish to change the investment allocation, please complete and submit to us the change of investment instruction form according to your investment objectives. Please refer to the Member Service Guide for the detailed information of change of investment allocation. You may download the relevant form from HSBC website [www.hsbc.com.hk/mpf](http://www.hsbc.com.hk/mpf) or contact our HSBC MPF Member Hotline 3128 0128 for assistance. For all other types of transfer, transfers will be effected by way of redemption of units, and the redemption proceeds will be reinvested according to the new investment allocation instruction. In such case, the transfer will be subject to 'out-of-market risk' as a result of the time gap between the redemption from the Employer's existing MPF scheme and investment in the Employer's new MPF scheme; and 成員確認明白及接受以下安排。有關僱員的累算權益轉移，於同一個滙豐強積金計劃之內由一個賬戶轉移至另一個賬戶，不論新賬戶所選擇的投資分布如何，累算權益的轉移是把基金單位轉移而毋須贖回。如你欲更改投資分配，請根據你的投資目標，填妥及遞交更改投資指示表格予我們。有關更改投資分配之詳情請參閱成員服務指南。你可於滙豐的網址[www.hsbc.com.hk/mpf](http://www.hsbc.com.hk/mpf)下載或致電我們的滙豐強積金成員熱線3128 0128索取有關表格。任何其他情況的轉移，基金單位將會被贖回及被贖回之款項將按照新的投資分布指示再作投資。在這情況下，由僱主現有的強積金計劃被贖回之款項再投資於僱主新的強積金計劃的期間將可能出現「投資真空期風險」；及
- XIII. the Member confirms that no accrued benefits under the Existing Employer's MPF scheme have been paid to him/her in part or in whole as a severance payment or long service payment; and 成員確認沒有就現僱主的強積金計劃而獲支付任何累算權益作為部分或全數的遣散費或長期服務金；及
- XIV. the Member has read and understood the full details of this form (including the Notes on this form) and agree to abide by the rules stated herein. 成員已細閱及明白此表格內的所有內容(包括此表格上的注意部分)，並同意遵守此述的規則。

**X**

Signature of Member 成員簽署

Full name 全名

Date 日期

(This signature must be the same as your previous specimen submitted to us. Otherwise, this form may not be processed. 此簽名須與你之前遞交予我們的式樣相同，否則本表格可能不獲處理。)

Authorised signature and company chop of Existing Employer  
現僱主授權簽署及公司蓋章

Authorised signature and company chop of New Employer  
新僱主授權簽署及公司蓋章

**X**

Full name 全名

**X**

Full name 全名

Date 日期

Date 日期