

Starting from 1 January 2020, HSBC Mandatory Provident Fund – SuperTrust Plus becomes reporting financial institution under Inland Revenue Ordinance (Cap. 112) ('the Ordinance'). To comply with the Ordinance, please provide and confirm to us your tax residency information through the relevant new application form embedded with the Tax Residency Self-Certification for MPF scheme/account enrolled on or after 1 January 2020. Otherwise, the enrollment process for MPF scheme/account will be adversely affected and could not be completed. 由2020年1月1日開始，滙豐強積金智選計劃成為在《稅務條例》(第112章)(「條例」)下的申報金融/財務機構。為遵守條例，請於2020年1月1日或以後透過載有稅務居民自我證明的相關新申請表格向我們提供及確認你的稅務居民資料以參加強積金計劃/賬戶。否則參加強積金計劃/賬戶的程序將受到影響及無法完成。



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 – SUPERTRUST PLUS
 TAX DEDUCTIBLE VOLUNTARY CONTRIBUTIONS ACCOUNT
 HOLDER APPLICATION FORM
 (TAX DEDUCTIBLE VOLUNTARY CONTRIBUTIONS ACCOUNT HOLDER)
 滙豐強積金智選計劃：可扣稅自願性供款申請表(可扣稅自願性供款賬戶持有人)**

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。
- Please read the "Notes on Tax Deductible Voluntary Contributions (TVCC) Account" before you complete this Form. 填寫本表格前，請先閱讀《可扣稅自願性供款賬戶須知》。
- If you have chosen Chinese as your preferred language, please provide your residential address in both English and Chinese. 如你所選擇的通訊語言為中文，請同時提供中英文住宅地址。
- Please note that if you wish to register for HSBC Internet Banking in future (this service is not available for passport holder with passport number more than 12 digits), you should provide both your address in English and mobile phone number in this form. 請注意：如欲日後登記使用滙豐網上理財(此服務不適用於護照號碼超過12位數字的護照持有人)，你必須在本表格同時提供英文地址及流動電話號碼。
- The personal information (including any blank field) that you provided in Section A of this form but except address and contact phone number will automatically apply to ALL your accounts maintained with HSBC MPF under the HKID/Passport number stated in Section A5 below. If you wish to change your personal details for a specific account, please complete the 'Personal Details Change Form' (IN91). If you wish to change your personal details for non-HSBC MPF account (e.g. HSBC Banking Service), please submit a relevant change form or you can change your personal details for your HSBC accounts via the HSBC Personal Internet Banking at www.hsbc.com.hk. 你於本表格A部所填寫的個人資料(包括任何留空部分)但除地址及聯絡電話號碼之外，將自動適用於你以下述A部第5項之香港身分證/護照號碼登記的所有滙豐強積金賬戶。如你欲更改指定賬戶的個人資料，請填寫《更改個人資料表格》(IN91)。如你欲更改非滙豐強積金賬戶(例如滙豐銀行服務)的個人資料，請遞交有關更改表格，或可透過www.hsbc.com.hk的滙豐個人網上理財更改你的滙豐賬戶個人資料。
- Please note that the Tax Deductible Voluntary Contributions application is not applicable for persons who are US citizen/with US nationality, are US resident or US tax payer, or have a US address (e.g. primary mailing, residence or business address in the US). 請注意可扣稅自願性供款申請不適用於美國公民/擁有美國國籍的人士、美國居民或美國納稅人，或有美國地址的人士(例如主要通訊地址、居住地址或工作地址在美國)。
- Certified true copies should be certified by any of the following personnel 提交認證副本可經由下列人士核證：
 - A certified public accountant/lawyer/banker/notary public acceptable to entities of HSBC Group; or 任何滙豐集團成員認可的執業會計師/律師/往來銀行/公證人；或
 - A member of Hong Kong Institute of Chartered Secretaries (HKICS); or 任何香港特許秘書公會會員；或
 - A MPF specialist at HSBC designated branches — You may bring along your HK permanent ID card/passport to any one of HSBC designated branches for verification purpose. For the information about the HSBC designated branches, please visit www.hsbc.com.hk/mpf. 指定滙豐分行詳情，請瀏覽www.hsbc.com.hk/mpf。 你可攜同你的香港永久性居民身分證/護照親臨任何一間指定滙豐分行，以便我們核實你的身分。查詢指定滙豐分行詳情，請瀏覽www.hsbc.com.hk/mpf。
- 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積權益將會按照「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。
- Please return the completed form and cheque payment (if applicable), together with certified true copies of your HK permanent ID card/passport to the Administrator – The Hongkong and Shanghai Banking Corporation Limited. 請將填妥的表格及支票(如適用)連同你的香港永久性居民身分證/護照之認證副本寄交行政管理人 – 香港上海滙豐銀行有限公司。
- Please note that the administrator of the scheme may request you to provide further details and documents. 請注意：計劃行政管理人可能會要求你提供其他相關資料及文件。
- Tax Deductible Voluntary Contributions account with zero balance and in respect of which there is no transaction activity for 365 days may be terminated by the trustee. 零結餘及於365天內沒有任何交易活動的可扣稅自願性供款賬戶將有可能被信託人終止。
- If you have already registered as a HSBC Personal Internet Banking user, you can select to receive MPF member benefit statement electronically. To know more about registration of and access to the electronic MPF member benefit statement, please visit www.hsbc.com.hk/mpf/estatement. 如你已登記成為滙豐個人網上理財用戶，你可選用電子方式接收強積金成員權益報表，有關電子強積金成員權益報表的登記及查閱方法，請瀏覽www.hsbc.com.hk/mpf/estatement。

A. Details of applicant 申請人資料

1. Full name (in English)* 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) <input type="checkbox"/> Mr 先生 <input type="checkbox"/> Ms 女士 Surname 姓氏 _____ Given name 名字 _____	
2. Chinese name (if any) 中文姓名(如有) Surname 姓氏 _____ Given name 名字 _____	3. Other name (in English) (if any) 別名(英文)(如有) Surname 姓氏 _____ Given name 名字 _____
4. Previous name in English (if legal name has been changed within the past 5 years) 過往英文全名(如法定名稱在過去5年內曾經改變) Surname 姓氏 _____ Given name 名字 _____	

5. Identification number 身分證明文件號碼 (please provide a certified true copy 請附上認證副本)

HKID card no. 香港身分證號碼: _____ ()

Passport no. (ONLY applicable for person without HKID card, please provide the place of issue.)
護照號碼(僅供沒有香港身分證的人士填寫, 請填寫簽發地點。): _____

Place of issue 簽發地點: _____

6. Date of birth* 出生日期*

_____ | _____ | _____
Year 年 Month 月 Day 日

If your HKID card only contains the year and you have no other form of identity to prove the exact date of birth (e.g. birth certificate, passport), you should use 31 December as the day and month. Likewise, if your HKID card contains the year and month but not the day, you should use the last day of the month shown. If you leave the day and/or month blank, your date of birth will be regarded as the last day of that month or 31 December. 如你的香港身分證上只有出生年份, 而你沒有其他形式的證件可證明你的實際出生日期(例如出生證明書或護照), 便應以12月31日作為出生日期。同樣地, 如你的香港身分證上只有出生年份和月份而並沒註明有關日子, 便應以有關月份的最後一天作為出生日期。請注意, 若留空日子及/或月份, 你的出生日期則被視為該月的最後一天或12月31日。

7. Place of birth 出生地區

8. Nationality (Country/Region) 國籍(國家/地區)1 : _____

Multiple Nationality (Country/Region) 多重國籍(國家/地區)

Yes 是 No 否

Nationality (Country/Region) 國籍(國家/地區)2 (if any 如有) : _____

Nationality (Country/Region) 國籍(國家/地區)3 (if any 如有) : _____

9. Contact number 聯絡電話

10. E-mail address 電郵地址

11. Sex (M/F) 性別(男/女)

12. Scheme ID of Tax Deductible Voluntary Contributions Account¹ 可扣稅自願性供款賬戶的計劃編號¹ (Please quote this Scheme ID in any future correspondence 請在日後的通訊中註明此計劃編號)

| 2 | 3 | 3 | 3 | 3 | 3 | 2 | 3 |

13. Residential address (The main address the majority of the time is spent or resided) (in English)

住宅地址(大部分時間居住在這個主要地址)(英文)

- **PO Box address is not accepted 恕不接受郵政信箱**
- **Correspondence will be sent to this address 有關通訊將寄往此地址**

Effective date for residential address 住宅地址生效日期 _____ | _____ | _____
Year 年 Month 月

_____ | _____ | _____ | _____
Room/Flat 室 Floor 樓 Block 座 Name of building 大廈名稱

_____ | _____
Name of estate 屋邨名稱 Number and name of street/road 門牌號碼及街道名稱

_____ | HK 香港 KLN 九龍 NT 新界 Others 其他 | _____ | _____
District/Postal code 地區/郵政編號 City* 城市* Country/Region* 國家/地區*

14. Previous residential address 前住址 (Please continue on a separate sheet and attach for submission if space provided is not sufficient. 如表格不敷應用, 請於另紙作出補充並一併遞交。)

Not applicable 不適用

Previous residential address 前住址 (if reside at current residential address less than 1 year 如居於現址少於一年)

_____ | _____ | _____ | _____
Room/Flat 室 Floor 樓 Block 座 Name of building 大廈名稱

_____ | _____
Name of estate 屋邨名稱 Number and name of street/road 門牌號碼及街道名稱

_____ | HK 香港 KLN 九龍 NT 新界 Others 其他 | _____ | _____
District/Postal code 地區/郵政編號 City 城市 Country/Region 國家/地區

* The information are required to be reported by the reporting financial institution to the Inland Revenue Department. 這些項目為申報金融/財務機構須向稅務局申報的資料。

¹ An independent Tax Deductible Voluntary Contributions account, scheme ID beginning with '23', will be set up for you, you need to quote this Scheme ID to manage your Tax Deductible Voluntary Contributions account in future. For details, please refer to the enrolment confirmation which will be sent to you later. 一個獨立的可扣稅自願性供款賬戶以計劃編號[23]為開首將會被設立, 日後你必須提供此計劃編號以處理你的可扣稅自願性供款賬戶, 詳情請參閱稍後寄上的計劃確認書。

15. Preferred language for future correspondence 請選擇日後通訊的語言

- English 英文 Chinese 中文 (請以中文填寫B部)

If preferred language is not selected, English will be used for future correspondence. 如沒有選擇，英文將會是日後通訊語言。

16. Employment status 僱傭狀況

- Employed 受僱

Name of employer 僱主名稱: _____

Address of employer 僱主地址 (city and country/region 城市 and 國家/地區): _____

Occupation 職業: _____

- Business Owner 業務擁有人 Self-employed 自僱

(For business owner or self-employed 適用於業務擁有人/自僱)

Name of company 公司名稱: _____

Business address 營業地址: _____

Job title 工作職位: _____

- Retired 退休 Not currently employed 現時並未受僱
 Housewife 家庭主婦
 Others 其他 (please specify 請註明: _____)

17. Employment start date 任職日期

_____ | _____
Year 年 Month 月

18. Nature of business 業務性質

- | | |
|---|--|
| <input type="checkbox"/> Agriculture/Livestock specialties 農業/家畜業 | <input type="checkbox"/> Construction 建築 |
| <input type="checkbox"/> Business services 商用服務 | <input type="checkbox"/> Finance/Insurance 金融/保險 |
| <input type="checkbox"/> Catering 餐飲業 | <input type="checkbox"/> Freight transport/Cargo/Couriers 貨運/航運/速遞 |
| <input type="checkbox"/> Communication 通訊 | <input type="checkbox"/> Import/Export traders 出入口貿易 |
| <input type="checkbox"/> Education 教育 | <input type="checkbox"/> Jewellery/Precious metals/Art dealers 珠寶/貴金屬/藝術品經銷商 |
| <input type="checkbox"/> Hotel/Boarding houses 酒店/旅館 | <input type="checkbox"/> Pharmaceutical industry 藥業 |
| <input type="checkbox"/> Personal/Household services 個人/家庭服務 | <input type="checkbox"/> Real estate 地產 |
| <input type="checkbox"/> Others 其他 (please specify 請註明: _____) | <input type="checkbox"/> Sales/Rental of vehicles & equipment 車輛及相關設備銷售/租借 |
| | <input type="checkbox"/> Textile business 紡織業 |

19. Source of fund 資金來源

- | | |
|---|---|
| <input type="checkbox"/> Earning from work 工作薪金 | <input type="checkbox"/> Personal savings 個人儲蓄 |
| <input type="checkbox"/> Inheritance 遺產承繼 | <input type="checkbox"/> Sale of an asset 出售資產 (e.g. property 例如物業) |
| <input type="checkbox"/> Investment return/Investment matured 投資回報/投資到期 | <input type="checkbox"/> Others 其他 (please specify 請註明: _____) |

20. Annual income (HKD) 每年收入(港幣) (including bonus, commissions, etc. 實際收入包括獎金、佣金等)

HKD 港幣 _____ 元

21. Expected total value of fund for first 12 months 首12個月預期總資金額

HKD 港幣 _____ 元

22. Expected monthly contribution 預期每月供款

HKD 港幣 _____ 元

B. Chinese details 中文資料 (Complete this section if you have selected Chinese as your preferred language 如你選擇以中文為通訊語言，才須填寫此欄)

1. 姓名 <input type="checkbox"/> 先生 <input type="checkbox"/> 女士 姓名	2. 過往中文全名(如法定名稱在過去5年內曾經改變) 姓名
3. 住宅地址(大部分時間居住在這個主要地址)(請確保於A13欄目填寫英文地址) 室 樓 座 大廈名稱 屋邨名稱 門牌號碼及街道名稱 地區/郵政編號 <input type="checkbox"/> 香港 <input type="checkbox"/> 九龍 <input type="checkbox"/> 新界 <input type="checkbox"/> 其他 城市* 國家/地區*	

* The information are required to be reported by the reporting financial institution to the Inland Revenue Department. 這些項目為申報金融/財務機構須向稅務局申報的資料。

C. Investment option 投資選擇

Please make **ONE** choice below and tick ✓ the appropriate box. If you do not wish to make a fund choice, or if this section is left blank, your contributions will be invested in accordance with the DIS, then the DIS will be effected automatically. 請作出下列其中一項選擇，並於適當的方格內加上「✓」號。如你不打算作出基金選擇，或如留空此部分，你的供款將會按照「預設投資策略」來作出投資，因此「預設投資策略」將自動生效。

(I) DIS 「預設投資策略」

Your future contributions and accrued benefits transferred from another Registered Scheme² will be invested in accordance with the DIS. Please refer to the 'MPF Scheme Brochure' for details. 你的未來供款及轉移自另一註冊計劃的累算權益²將會按照「預設投資策略」來作出投資。詳情請參閱「強積金計劃說明書」。

Name of Constituent Fund 成分基金名稱	Type of fund 基金類別	Fund Code 基金代號	Investment allocation percentage 投資分布百分比
Core Accumulation Fund 核心累積基金	Mixed Assets Fund 混合資產基金	CAF	100%
Age 65 Plus Fund 65歲後基金	Mixed Assets Fund 混合資產基金	APF	The DIS is invested in the Core Accumulation Fund and the Age 65 Plus Fund according to the pre-set allocation percentages at different ages and will adjust risk by way of reducing the holding in the Core Accumulation Fund and increasing the holding in the Age 65 Plus Fund when the member gets older. For more details on de-risking of the DIS, please refer to the 'MPF Scheme Brochure'. 「預設投資策略」透過於不同年齡按照預定配置百分比來投資於核心累積基金與65歲後基金及會隨著成員年齡增長以減持核心累積基金及增持65歲後基金來調整風險。有關「預設投資策略」降低風險機制的詳情，可參閱「強積金計劃說明書」。

Or 或

(II) Own investment option 自選投資組合

Please indicate which of the following Constituent Fund(s) you would like your future contributions and accrued benefits transferred from another Registered Scheme² under SuperTrust Plus be invested. The investment allocation percentages should be in whole numbers (e.g. 50% not 50.5%) and the total should be 100%. If the total allocation is not 100%, your contributions will be invested in accordance with the DIS. 請指示如何把未來供款及轉移自另一註冊計劃的累算權益²分配至下列智選計劃的成分基金內。投資分布百分比必須為整數(例如：須為50%而非50.5%)及其總和必須為100%。如分布總和不等於100%，你的供款將會按照「預設投資策略」來作出投資。

Name of Constituent Fund 成分基金名稱	Type of fund 基金類別	Fund code 基金代號	Investment allocation percentage 投資分布百分比 (Please counter-sign for any amendments made. 如有任何更改，請在旁加簽作實。)
MPF Conservative Fund 強積金保守基金	Money Market Fund 貨幣市場基金	CPF	%
Global Bond Fund 環球債券基金	Bond Fund 債券基金	GBF	%
Guaranteed Fund ³ 保證基金 ³	Guaranteed Fund 保證基金	GTF	%
Age 65 Plus Fund ⁴ 65歲後基金 ⁴ (without de-risking nature 沒有風險降低特性)	Mixed Assets Fund 混合資產基金	FMF	%
Core Accumulation Fund ⁴ 核心累積基金 ⁴ (without de-risking nature 沒有風險降低特性)	Mixed Assets Fund 混合資產基金	SGF	%
Stable Fund 平穩基金	Mixed Assets Fund 混合資產基金	SBF	%
Balanced Fund 均衡基金	Mixed Assets Fund 混合資產基金	BLF	%
Growth Fund 增長基金	Mixed Assets Fund 混合資產基金	GRF	%
ValueChoice Balanced Fund 自選均衡基金	Mixed Assets Fund 混合資產基金	VBLF	%
Global Equity Fund 環球股票基金	Equity Fund 股票基金	GEF	%
North American Equity Fund 北美股票基金	Equity Fund 股票基金	NAEF	%
European Equity Fund 歐洲股票基金	Equity Fund 股票基金	EUEF	%
Asia Pacific Equity Fund 亞太股票基金	Equity Fund 股票基金	ANEF	%
Hong Kong and Chinese Equity Fund 中港股票基金	Equity Fund 股票基金	HKEF	%
Chinese Equity Fund 中國股票基金	Equity Fund 股票基金	CNEF	%
ValueChoice US Equity Fund 自選美國股票基金	Equity Fund 股票基金	VUEF	%
ValueChoice European Equity Fund 自選歐洲股票基金	Equity Fund 股票基金	VEEF	%
ValueChoice Asia Pacific Equity Fund 自選亞太股票基金	Equity Fund 股票基金	VAEF	%
Hang Seng Index Tracking Fund 恒指基金	Equity Fund 股票基金	HSIF	%
Hang Seng China Enterprises Index Tracking Fund 恒生中國企業指數基金	Equity Fund 股票基金	HSHF	%
Total 總和			100%

² If the asset is transferred from one account to another account or a personal account within the same HSBC MPF scheme, the fund allocation (i.e. units under respective Constituent Funds) of such asset will remain unchanged until asset switching instruction is received from you. 如將資產由一個滙豐強積金計劃賬戶轉移至同一計劃的另一個賬戶或個人賬戶，該筆資產的基金分布(即各成分基金單位)將維持不變，直至你另行作出基金調配指示為止。

³ For information about the Guaranteed Interest Rate, please visit www.hsbc.com.hk/mpf or call our Customer Service Representative on 3128 0128. 查詢保證利率詳情，請瀏覽 www.hsbc.com.hk/mpf，或致電3128 0128聯絡我們的客戶服務主任。

⁴ If you choose to invest in the Core Accumulation Fund and/or the Age 65 Plus Fund (as a standalone investment fund rather than as part of the DIS), those investments will not be subject to the de-risking process. 若你選擇投資於核心累積基金及/或65歲後基金(作為單獨投資基金而非「預設投資策略」)，該等投資將不會遵從降低風險程序。

D. Regular contributions 定期供款

The minimum amount of monthly regular contributions is **HKD300**. Regular contributions must be made by direct debit, and Section I 'Direct debit authorisation' must be completed to authorise these. Please note that the first regular contributions will be debited from your bank account after we have sent out a 'Confirmation of direct debit authorisation' or on the date stated in Sections D2 and D3 below (whichever is later). 最低每月定期供款額為**港幣300元**。定期供款必須透過直接支賬方式支付，並請填妥I部「直接付款授權書」。首次定期供款將於我們寄出「直接付款授權確認書」後或按以下D2及D3欄的指定日期(以較後者為準)從你的銀行戶口中扣除。

1. Monthly regular contributions 每月定期供款 HKD 港幣 _____ 元	2. First direct debit month 首次直接支賬月份 MM 月 YYYY 年	3. Monthly direct debit date ^{5,6} on 每月直接支賬日期 ^{5,6} <input type="checkbox"/> _____ day 日 <input type="checkbox"/> last day of each month 每月最後一天
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⁵ If the direct debit day is a public holiday, a gale warning day or a black rainstorm warning day, then it shall mean the following calendar day which is not a public holiday, a gale warning day or a black rainstorm warning day. 如直接支賬日期為公眾假日、烈風警告日或黑色暴雨警告日，則指隨後非公眾假日、烈風警告日或黑色暴雨警告日之曆日。

⁶ Please note that the monthly direct debit date may be varied due to the transaction arrangement of the relevant bank account. 請注意每月直接支賬日期或會因有關銀行戶口的交易安排而有所不同。

E. Lump sum contributions 整筆供款

The minimum amount of each lump sum contributions is **HKD1,000**. Please enclose a crossed cheque⁷ issued by the scheme member stated in Section A1 and made payable to 'HSBC Provident Fund Trustee (Hong Kong) Limited'. 最低整筆供款額為每次**港幣1,000元**。請附上由註明於A1欄之計劃成員簽發的劃線支票⁷，抬頭祈付「HSBC Provident Fund Trustee (Hong Kong) Limited」。

1. Lump sum contributions enclosed 一併遞交的整筆供款 HKD 港幣 _____ 元	Cheque no. 支票號碼	Bank no. 銀行編號	Branch no. 分行編號
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⁷ Cashier order is not acceptable. 恕不接受銀行本票。

F. Contributor 資助人士 (Only applicable for payments via a Joint Account 只適用於透過聯名戶口作出供款)

Any third parties contributions over HKD78,000 per month to your HSBC MPF account(s) 第三供款者提供每月多於港幣78,000元予你的滙豐強積金賬戶 <input type="checkbox"/> No 否 <input type="checkbox"/> Yes 是 (please list out information of your contributor below 請在下方列出該資助人士的資料) :	
Surname (in English) 姓(英文姓氏)	Given name (in English) 名(英文姓名)
Previous name (if legal name has been changed within the past 5 years) 過往名稱(如法定名稱在過去5年內曾經改變)	Date of birth 出生日期 (DD/MM/YYYY)
Does the contributor have multiple nationalities (country/region)? 資助人士是否持有多重國籍(國家/地區)? <input type="checkbox"/> Yes 是 <input type="checkbox"/> No 否	
Nationality (Country/Region) 1 國籍(國家/地區)1	Nationality (Country/Region) 2 國籍(國家/地區)2 (if any 如有)
Residential address 住宅地址 (The main address the majority of the time is spent or resided 大部分時間居住在這個主要地址) (Please complete in English 請以英文填寫)	

G. Tax Residency Self-Certification (Mandatory) 稅務居民自我證明(必須填寫)

Please read the following instructions before completing this section 請在填寫本部分前細閱以下指示：

Why are we asking you to complete this section? 為何我們要求你填寫本部分？

To help protect the integrity of tax systems, governments around the world are introducing a new information-gathering and reporting requirement for financial institutions. This is known as the Common Reporting Standard (the “CRS”). 為維護稅制完整，全球各地政府現正推出適用於金融／財務機構的資料收集及匯報新規例，名為共同匯報標準(簡稱[CRS])。

Under the CRS, we are required to determine where you are a “tax resident” (this will usually be where you are liable to pay income taxes). If you are a tax resident outside the jurisdiction where your account is held, we may need to give the national tax authority this information, along with information relating to your accounts. That may then be shared between different jurisdictions’ tax authorities. 根據CRS規定，我們必須確定你的「稅務居住地」(這通常是你有義務繳納薪俸稅的國家／地區)。若你的稅務居住地有別於所持賬戶的司法管轄區，我們可能需要將此情況及你的有關賬戶資料告知國家／地區稅務機關，該等機關隨後或會將相關資料傳送給不同國家／地區的稅務機關。

Completing this section will ensure that we hold accurate and up to date information about your tax residency. 填寫本部分可確保我們持有你正確及最新的稅務居住地資料。

If your circumstances change and any of the information provided in this section becomes incorrect, please let us know immediately and provide an updated ‘Individual Tax Residency Self-Certification Form (CRS-I (HK)-MPF)’. 如你的情況有變，導致本部分內的任何資料不再正確，請立即告知我們，並提交一份已更新的「個人稅務居民自我證明表格(CRS-I (HK)-MPF)」。

Where to go for further information? 如何獲取更多資訊？

If you have any questions about this section, please call our MPF hotline 2583 8033 (Employer) or 3128 0128 (Member). 如對本部分有任何疑問，請致電我們的強積金熱線2583 8033(僱主)或3128 0128(成員)。

The Organisation for Economic Co-operation and Development (“OECD”) has developed the rules to be used by all governments participating in the CRS and these can be found on the OECD’s Automatic Exchange of Information (“AEOI”) website, www.oecd.org/tax/automatic-exchange/. 經濟合作與發展組織(簡稱「經合組織」)已制訂規則，供參與CRS的所有政府使用，並載於經合組織的自動交換資料(簡稱「AEOI」)網站www.oecd.org/tax/automatic-exchange/。

Please also visit the website of the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region that sets out information relating to the implementation of AEOI in Hong Kong: http://www.ird.gov.hk/eng/tax/dta_aeoi.htm. Meaning of terms and expressions used in this form (e.g. “account holder” and “reportable account”) may be found under Section 50A of the Inland Revenue Ordinance (Cap. 112). 另請參閱香港特別行政區政府稅務局(簡稱「稅務局」)的網站了解香港實施AEOI的詳情：www.ird.gov.hk/chi/tax/dta_aeoi.htm。有關本表格內所用詞彙的涵義(例如：「賬戶持有人」和「須申報賬戶」)，請參閱《稅務條例》(第112章)第50A條。

If you have any questions on how to define your tax residency status, please visit the OECD website, www.oecd.org/tax/automatic-exchange/ or speak to your tax advisor as we are not allowed to give tax advice. 如你對判定你的稅務居民身分有任何疑問，請瀏覽經合組織網站www.oecd.org/tax/automatic-exchange/或諮詢你的稅務顧問。請恕我們不能提供稅務意見。

Important Notes 重要提示：

- This is a self-certification provided by an account holder to a reporting financial institution for the purpose of automatic exchange of financial account information. The data collected may be transmitted by the reporting financial institution to the Inland Revenue Department for transfer to the tax authority of another jurisdiction. 這是由賬戶持有人向申報金融／財務機構提供的自我證明，以作自動交換財務賬戶資料用途。申報金融／財務機構可把收集所得的資料交給稅務局，稅務局會將資料轉交到另一稅務管轄區的稅務當局。
- An account holder should report all changes in his/her tax residency status to the reporting financial institution. 如賬戶持有人的稅務居民身分有所改變，應盡快將所有變更通知申報金融／財務機構。
- If space provided is insufficient, continue on additional sheet(s). Information in Section A, B & G marked with an asterisk (*) are required to be reported by the reporting financial institution to the Inland Revenue Department. 如空位不夠應用，可另紙填寫。在A部、B部及G部標有星號(*)的項目為申報金融／財務機構須向稅務局申報的資料。

G. Tax Residency Self-Certification (Mandatory) (cont'd) 稅務居民自我證明(必須填寫)(續)

(1) My Tax Residence is Hong Kong ONLY, with no tax residence in any other jurisdictions/countries/regions AND my HKID number is my TIN. 本人之稅務居住地只有香港，及沒有處於任何其他司法管轄區／國家／地區的稅務居住地而本人的香港身分證號碼是本人的稅務編號。

- Yes 是 (you may skip (2). 你可略過第(2)部分。)
- No 否 (please complete (2). 請填寫第(2)部分。)

(2) Complete the following table indicating 提供以下資料，列明：

- (a) **all** jurisdictions where the account holder is a **resident for tax purposes**; and 賬戶持有人作為**稅務居民的所有司法管轄區**；及
- (b) the account holder's TIN for each jurisdiction indicated. 該稅務管轄區發給賬戶持有人的稅務編號。

If the account holder is a tax resident of Hong Kong, the TIN is the Hong Kong Identity Card Number (HKID). 如賬戶持有人是香港稅務居民，稅務編號是賬戶持有人的香港身分證號碼。

If a TIN is unavailable, provide the appropriate reason **A, B or C** 如沒有提供稅務編號，必須填寫合適的理由：

- # **Reason A** - The jurisdiction where the account holder is a resident for tax purposes does not issue TINs to its residents.
理由A - 賬戶持有人的稅務管轄區並沒有向其居民發出稅務編號。
- Reason B** - The account holder is unable to obtain a TIN. Explain why the account holder is unable to obtain a TIN if you have selected this reason.
理由B - 賬戶持有人不能取得稅務編號。如選取這一理由，解釋賬戶持有人不能取得稅務編號的原因。
- Reason C** - TIN is not required. Select this reason only if the authorities of the jurisdiction of tax residence do not require the TIN to be disclosed.
理由C - 賬戶持有人毋須提供稅務編號。稅務管轄區的主管機關不需要賬戶持有人披露稅務編號。

	Jurisdiction of Tax Residence* 稅務管轄區*	TIN* 稅務編號*	*Enter Reason A, B or C if no TIN is available 如沒有提供稅務編號，填寫理由A、B或C	Explain why the account holder is unable to obtain a TIN if you have selected Reason B 如選取理由B，解釋賬戶持有人不能取得稅務編號的原因
1				
2				
3				
4				
5				

H. Declaration and authorisation 聲明及授權書

1. **Participation** — by signing this form, I **參加計劃** — 在簽署本表格後，本人：
- would like to open a Tax Deductible Voluntary Contributions account under the scheme. 想在此計劃中開立可扣稅自願性供款賬戶。
 - understand that in order to be eligible to open a Tax Deductible Voluntary Contributions account under the Mandatory Provident Fund Schemes Ordinance, I must be a current holder of a contribution account, a personal account of an MPF scheme or a current member of an Occupational Retirement Scheme (ORSO scheme) who is exempted from the provisions of the Mandatory Provident Fund Schemes Ordinance (Cap. 485) (MPFSO) by virtue of section 5 of the MPFSO (i.e. a member of an MPF Exempted ORSO Scheme). 明白根據《強制性公積金計劃條例》，為合資格開立可扣稅自願性供款賬戶，本人必須要是現有強積金計劃的供款賬戶、個人賬戶持有人或在《職業退休計劃》下之現有成員，而該成員按《強積金條例》第5條獲豁免而不受《強制性公積金計劃條例》(第485章)(簡稱《強積金條例》)的條文管限(即強積金豁免的職業退休計劃成員)。
 - confirm that I am a current member of 確認本人是下列之現有成員：
 - contribution account(s) of MPF scheme(s); and /or 強積金計劃的供款賬戶；及／或
 - personal account(s) of MPF scheme(s); and/or 強積金計劃的個人賬戶；及／或
 - MPF exempted ORSO scheme(s) 強積金豁免的職業退休計劃
 - declare that to the best of my knowledge and belief, the information given in this section for the purpose of opening a Tax Deductible Voluntary Contributions account in the scheme is correct and complete.† 聲明盡本人所知所信，在本部分為在此計劃開立可扣稅自願性供款賬戶填報的所有資料均屬正確無訛且並無缺漏。†
 - understand that the investment allocation as specified in Section C will be applied to all contributions including any monies transferred into SuperTrust Plus. 明白填寫於C部的投資分布將適用於任何供款，包括任何轉移至智選計劃的款項。
 - declare I have read and understood the MPF Scheme Brochure. 謹此聲明已閱讀和明白強積金計劃說明書的內容。
 - agree to comply with the Master Trust Deed of the scheme. 同意遵守計劃的集成信託契約。
 - confirm having read and understood the personal information collection statement below. 確認已閱讀和明白以下收集個人資料聲明。
 - acknowledge and agree that (i) the information contained in this form is collected and may be kept by HSBC Provident Fund Trustee (Hong Kong) Limited (the "Trustee") for the purpose of automatic exchange of financial account information, and (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, pursuant to the legal provisions for exchange of financial account information provided under the Inland Revenue Ordinance (Cap.112). 知悉及同意，HSBC Provident Fund Trustee (Hong Kong) Limited (「信託人」)可根據《稅務條例》(第112章)有關交換財務賬戶資料的法律條文，(i)收集本表格所載資料並可備存作自動交換財務賬戶資料用途及(ii)把該等資料和關於賬戶持有人及任何須申報賬戶的資料向香港特別行政區政府稅務局申報，從而把資料轉交到賬戶持有人的稅務管轄區的稅務當局。
 - undertake to advise the Trustee of any change in circumstances which affects the tax residency status of the individual identified in Section A of this form or causes the information contained herein to become incorrect, and to provide the Trustee with a suitably updated 'Individual Tax Residency Self-Certification Form (CRS-I (HK)-MPF)' within 30 days of such change in circumstances. 承諾，如情況有所改變，以致影響本表格A部所述的個人的稅務居民身分，或引致本表格所載的資料不正確，本人會通知信託人，並會在情況發生改變後30日內，向信託人提交一份已適當更新的「個人稅務居民自我證明表格(CRS-I (HK)-MPF)」。
 - declare that the information given and statements made in this form are, to the best of my knowledge and belief, true, correct and complete. 聲明就本人所知所信，本表格內所填報的所有資料和聲明均屬真實、正確和完備。

Personal information collection statement 收集個人資料聲明

- The personal data provided by Participating Employers and/or Members and details of transactions or dealings by such Participating Employers and/or Members from time to time may be used for one or more of the following purposes: - (i) the administration and/or management of or in connection with the contributions or accrued benefits or MPF account in respect of the Participating Employers and/or Members under the HSBC MPF scheme and Hang Seng MPF scheme administered by the HSBC Group; (ii) conducting direct marketing activities of MPF products and/or MPF services by entities of the HSBC Group as described in paragraph 5 below only if your consent is obtained (which includes an indication of no objection); (iii) improving and furthering the provision of MPF products and/or MPF services (including through customer research or surveys) by entities of the HSBC Group, subject to applicable MPF legislation; (iv) matching for MPF related purpose with other personal data concerning the relevant Participating Employers and/or Members; (v) compliance or in accordance with an order of a court or compliance or in accordance with a law or a requirement made under a law (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information) or compliance or in accordance with any guidelines, guidance or requests given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information. 不時由參與僱主及／或成員所提供的個人資料及該等參與僱主及／或成員的交易或事務往來的詳情將可被用於以下一項或多項用途：(i)由滙豐集團管理行政的滙豐強積金計劃及恒生強積金計劃下與參與僱主及／或成員的供款或累積權益或強積金戶口有關的行政事宜及／或管理；(ii)在獲得你的同意下(包括表示不反對)，進行以下第5段所述由滙豐集團成員所提供的強積金產品及／或強積金服務的直接或有關促銷活動；(iii)在適用的強積金法例規限下，改善及進一步提供由滙豐集團成員所提供的強積金產品及／或強積金服務(包括透過客戶研究或調查)；(iv)為任何強積金相關的用途而核對相關參與僱主及／或成員的其他個人資料；(v)遵守或按照法庭命令或遵守或按照法律或根據法律訂立的規定(例如《稅務條例》及其條文，包括關於自動交換財務賬戶資料的條文)或遵守或按照任何稅務局所提供或發出的指引、指導或要求，包括關於自動交換財務賬戶資料的指引、指導或要求。
- Failure to provide your information may result in us being unable to process your application or perform the services you request. 如你未能提供資料將可能導致我們未能處理你的申請或提供你所要求的服務。
- Personal data held by us relating to a Participating Employer and/or Member will be kept confidential but such information may be provided by us or any of our service providers to the following parties for the purposes set out in paragraph 1:- (i) any regulators or government authorities in any jurisdiction; (ii) any service provider, agent or contractor who provides administrative, telecommunications, computer, payment, data processing, matching, storage, customer research or survey or other services in connection with the operation of our MPF business; (iii) relevant Participating Employers; (iv) entities of the HSBC Group. Such information may be transferred to a place outside Hong Kong Special Administrative Region. 由我們持有參與僱主及／或成員的個人資料將予保密，但我們或任何我們的服務供應商可能會將該等資料提供給以下各方作第1段所述的用途：(i)任何司法管轄區的監管機構或政府機關；(ii)任何提供與營運我們的強積金業務有關的行政、電訊、電腦、付賬、數據處理、核對、儲存、客戶研究或調查或其他服務的任何服務供應商、代理人或承包商；(iii)相關的參與僱主；(iv)滙豐集團成員。該等資料可能轉移至香港特別行政區以外的地方。

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

4. You have the right to request access to and correction of your personal data held by us. Request should be addressed to: The Data Protection Officer, HSBC Provident Fund Trustee (Hong Kong) Limited, c/o The Hongkong and Shanghai Banking Corporation Limited, PO Box 73770, Kowloon Central Post Office. 你有權要求查閱及更改由我們持有的個人資料。如有需要，可致函九龍中央郵政信箱73770號(c/o香港上海滙豐銀行有限公司)，向HSBC Provident Fund Trustee (Hong Kong) Limited資料保障主任提出要求。
5. We, entities of the HSBC Group, intend to use your personal data in direct marketing of MPF products and/or MPF services, and we require your consent (which includes an indication of no objection) for that purpose. In this connection, please note that: 我們，滙豐集團成員，擬把你的個人資料用於強積金產品及／或強積金服務的直接促銷，而我們為該用途須獲得你的同意(包括表示不反對)。就此，請注意：
- (i) your name, contact details, other products and services portfolio information, transaction pattern and behaviour, financial background and demographic data held by us from time to time may be used in direct marketing; and 我們可能把我們不時持有你的姓名、聯絡資料、其他產品及服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷；及
 - (ii) the MPF products and/or MPF services offered by entities of the HSBC Group may be marketed. 可用作促銷由滙豐集團成員所提供的強積金產品及／或強積金服務。

If you do not wish us to use your personal data in direct marketing as described above, you may exercise your opt-out right by notifying us. 如你不希望我們如上述使用你的個人資料作直接促銷用途，你可通知我們行使你的選擇權拒絕促銷。

6. No person other than you and us will have any right under the Contracts (Rights of Third Parties) Ordinance to enforce or enjoy the benefit of any of the provisions of these Terms and Conditions. 除你及我們以外，並無其他人士有權按《合約(第三者權利)條例》強制執行本條款及細則的任何條文，或享有本條款及細則的任何條文下的利益。

Please tick if you do not wish your personal data to be used for purpose of conducting direct marketing activities stated in paragraph 5 above. 如你不希望你的個人資料被用於上述第5段所列明的直接促銷活動，請在方格內填上剔號。

The above represents your present choice whether or not to receive direct marketing contact or information. This replaces any choice communicated by you to us prior to this application. 以上代表你目前就是否希望收到直接促銷聯繫或資訊的選擇，並取代你於本申請前向我們傳達的任何選擇。

X

Signature 簽署

Full name 全名

Date 日期

(This signature will be used to verify your future correspondence to us. 此簽署式樣將用於核對你日後給予我們的文件。)

+WARNINGS 注意：

- Under section 43E of the Ordinance, a person who, in any document given to the Mandatory Provident Fund Schemes Authority ("the Authority") or 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 HK\$100,000 fine and 1 year's imprisonment on the first conviction and a HK\$200,000 fine and 2 years' imprisonment on each subsequent conviction. 根據《條例》第43E條，任何人在給予強制性公積金計劃管理局(「管理局」)或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及監禁一年；其後每次定罪，最高可處罰款港幣\$200,000及監禁兩年。
- The Authority may verify the eligibility of the Tax Deductible Voluntary Contributions account holders. 管理局可查證可扣稅自願性供款賬戶持有人的資格。

WARNING: It is a serious offence under 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. Heavy penalty may apply upon conviction.

警告：根據《稅務條例》，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，即屬嚴重罪行。一經定罪，可致重罰。

I. Direct debit authorisation 直接付款授權書

Name of party to be credited (The Beneficiary) 收款的一方 (受益人)

HSBC Provident Fund Trustee (Hong Kong) Limited

I/We hereby authorise my/our below-named Bank to effect transfers from my/our account to that of the above-named beneficiary in accordance with such instructions as my/our Bank may receive from the beneficiary and/or its banker from time to time. 本人(我們)現授權本人(我們)的上述銀行, (根據受益人或其往來銀行不時給予本人(我們)銀行的指示)自本人(我們)的戶口內轉賬予上述受益人。

I/We agree that my/our Bank shall not be obliged to ascertain whether or not notice of any such transfer has been given to me/us. 本人(我們)同意本人(我們)的銀行毋須證實該等轉賬通知是否已交予本人(我們)。

I/We jointly and severally accept full responsibility for any overdraft (or increase in existing overdraft) on my/our account which may arise as a result of any such transfer(s). 如因該等轉賬而令本人(我們)的戶口出現透支(或令現時的透支增加), 本人(我們)願共同及個別承擔全部責任。

I/We confirm that my/our signature(s) on this authorisation form is/are the same as that/those for the operation of my/our savings/current account to be debited for the transfer. 本人(我們)確認, 本人(我們)於本授權書上的簽名, 與本人(我們)的儲蓄/往來戶口的簽名完全相同。

I/We agree to notify the above-named beneficiary of any change of bank account or cancellation of payment method and further agree that should there be insufficient funds in my/our account to meet any transfer hereby authorised, my/our Bank shall be entitled, at its discretion, not to effect such transfer in which event the Bank may levy the usual charge to be paid by me/us. 本人(我們)同意給予受益人任何更改銀行戶口或取消付款方法的通知, 並且同意如本人(我們)的戶口並無足夠款項支付該等授權轉賬, 本人(我們)的銀行有權不予轉賬, 且銀行可向本人(我們)收取慣常的費用。

This authorisation shall have effect until further notice. 本授權書將繼續生效直至另行通知為止。

I/We agree that any notice of cancellation or variation of this authorisation which I/we may give to my/our Bank shall be given at least 10 working days prior to the date on which such cancellation/variation is to take effect. 本人(我們)同意, 本人(我們)取消或更改本授權書的任何通知, 須於取消/更改生效日最少10個工作天前交予本人(我們)的銀行。

I/We hereby authorise HSBC Provident Fund Trustee (Hong Kong) Limited, to initiate and arrange for contributions to be debited from my/our bank account according to the following specification, in favour of HSBC Provident Fund Trustee (Hong Kong) Limited. 本人(我們)現授權HSBC Provident Fund Trustee (Hong Kong) Limited從本人(我們)下述銀行的戶口內, 提出及安排扣除供款, 以支付予HSBC Provident Fund Trustee (Hong Kong) Limited。

1. Bank and branch name 銀行及分行名稱		
Bank no. 銀行編號	Branch no. 分行編號	Account no. to be debited 扣款戶口號碼 (Please specify account suffix number for integrated account. 如戶口屬於綜合理財戶口, 請註明戶口字尾號碼。)
2. Details of account holder as on Statement/Passbook 戶口持有人於結單/存摺上的資料紀錄 (If you are in doubt, please contact your respective Bank. 如有疑問, 請聯絡你的相關銀行。)		
Name of account holder 戶口持有人姓名 (must be same as the name stated in Section A1 必須與A1欄填寫的姓名相符)		Signature of account holder 戶口持有人簽署
Identification number 身分證明文件號碼 <input type="checkbox"/> HKID Card No. 香港身分證號碼 _____ () <input type="checkbox"/> Passport No. 護照號碼 _____ <input type="checkbox"/> Others 其他 (Please specify 請註明) _____		X Date 日期
3. Please provide joint account holder's details (if applicable) 請填寫聯名戶口持有人資料 (如適用)		
Name of joint account holder 聯名戶口持有人姓名		Signature of joint account holder 聯名戶口持有人簽署
Identification number 身分證明文件號碼 <input type="checkbox"/> HKID Card No. 香港身分證號碼 _____ () <input type="checkbox"/> Passport No. 護照號碼 _____ <input type="checkbox"/> Others 其他 (Please specify 請註明) _____		X Date 日期

Please ensure sufficient funds are available in the above bank account. 請緊記將足夠金額存入上述銀行戶口以支付有關供款。

NOTES ON TAX DEDUCTIBLE VOLUNTARY CONTRIBUTIONS (TVC) ACCOUNT

可扣稅自願性供款賬戶須知

1. TVC refers to contributions paid into a TVC account of a registered scheme under [section 11A] of the Ordinance. It is a new type of contributions and is different from the voluntary contributions as defined in section 11 of the Mandatory Provident Fund Schemes Ordinance. Scheme member who wishes to make TVC should open a TVC account in a registered scheme and make TVC directly to the scheme without going through his/her employer. 可扣稅自願性供款是指根據條例第11A條向註冊計劃的可扣稅自願性供款賬戶繳付的供款。此乃新的供款類別及有別於《強制性公積金計劃條例》第11條所定義的自願性供款。欲作出可扣稅自願性供款的計劃成員需於註冊計劃內開立可扣稅自願性供款賬戶，及無需透過他／她的僱主而直接向計劃作出可扣稅自願性供款。
2. There should be ONLY one TVC account for a member in an MPF scheme. 每位成員於每個強積金計劃下應只有一個可扣稅自願性供款賬戶。
3. The following persons are eligible to open TVC account in an MPF scheme 以下為符合資格人士可於強積金計劃內開立可扣稅自願性供款賬戶：
 - (a) Current holders of contribution accounts or personal accounts of MPF schemes ; or 強積金計劃現有的供款賬戶或個人賬戶持有人；或
 - (b) Current members of MPF Exempted ORSO Schemes 強積金豁免的職業退休計劃之現有成員
4. It should be noted that voluntary contributions by members that are made through their employers to their contribution accounts are not TVC and such voluntary contributions will not be eligible for claiming tax deduction. 請注意，成員透過僱主於他們的供款賬戶作出的自願性供款並不是可扣稅自願性供款，而該自願性供款將不合申索稅務減免資格。
5. TVC account holder can choose to transfer ALL (but not part) of the benefits from one TVC account to another TVC account in another MPF scheme at any time. 可扣稅自願性供款賬戶持有人可隨時選擇將一個可扣稅自願性供款賬戶內的所有(但不是部分)權益轉移至另一個強積金計劃的可扣稅自願性供款賬戶內。
6. All existing preservation and withdrawal requirements applicable to MPF mandatory contributions will apply to benefits derived from TVC. In other words, scheme members can only withdraw their benefits derived from TVC in the following circumstances 所有現行適用於強積金之強制性供款的保存及提取條件均適用於可扣稅自願性供款所得的任何權益。換句話說，計劃成員只能在以下情況下提取可扣稅自願性供款所得的權益：
 - (a) Attaining the retirement age of 65 已達到65歲退休年齡
 - (b) Early Retirement 提早退休
 - (c) Permanent departure from Hong Kong 永久性地離開香港
 - (d) Total Incapacity 完全喪失行為能力
 - (e) Terminal Illness 罹患末期疾病
 - (f) Small Balance 小額結餘
 - (g) Death 死亡
7. TVC will be fully vested in the member once it is paid into the scheme. TVC paid into the scheme cannot be refunded/withdrawn (e.g. cannot be refunded for TVC made in excess of the maximum amount of deduction allowable under the Inland Revenue Ordinance (Cap. 112)) unless under specified circumstances as mentioned above. 已支付到計劃內的可扣稅自願性供款將完全歸屬於成員所有。除上述特定之情況外，支付到計劃內的可扣稅自願性供款均不可以退還／提取(例如，不可退還超出《稅務條例》(第112章)所容許的最高扣除金額的可扣稅自願性供款)。
8. Same as other voluntary contributions, the right or entitlement of the scheme members to any benefits derived from TVC in an MPF scheme may not be excluded from the property of the scheme member for the purposes of the Bankruptcy Ordinance. 與其他自願性供款一樣，強積金計劃的計劃成員從可扣稅自願性供款所得權益的權利，不得因《破產條例》而被排除在計劃成員的財產之外。
9. It is the responsibility of TVC account holder to keep track of the total amount of TVC made in a year of assessment for completion and filing of tax return. It should be noted that the maximum amount of deductions allowable under salaries tax and tax under personal assessment in a year of assessment under the Inland Revenue Ordinance (Cap. 112) is an aggregate limit for both TVC and qualifying annuity premiums rather than for TVC only. 可扣稅自願性供款賬戶持有人須自行查閱於每個課稅年度所作出的可扣稅自願性供款的總金額以作填寫及提交報稅表之用。請注意，根據《稅務條例》(第112章)的薪俸稅及個人入息課稅下，每個課稅年度內可容許的最高扣除額為可扣稅自願性供款及合資格的年金保費之總限額，而非僅適用於可扣稅自願性供款。