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## BEA (MPF) Industry Scheme 東亞(強積金)行業計劃



### Member – Transfer of Accrued Benefits Upon Intra-group Transfer / Change of Business Ownership

#### 成員 – 聯繫公司或更改業務擁有權之成員累算權益轉移

- (i) This form should ONLY be used for transferring a Member's accrued benefits from his / her Existing Employer's MPF scheme to the New Employer's MPF scheme as a result of transfer of employment between associated companies or change of business ownership.  
此表格只適用於成員及其強積金內的累算權益由現僱主轉移到另一間有聯繫公司或因業務轉手而轉移到新僱主的強積金計劃之內。
- (ii) This form must be completed by Member with existing and new Employer's signature. Please use BLOCK LETTERS for completion.  
本表格必須由成員填寫及現在和新僱主簽署。請以正楷填寫。
- (iii) Upon completion of this Form, the New Employer should return this Form together with "Employer – Request for Fund Transfer Form" to the new trustee. If New Employer chooses BANK OF EAST ASIA (TRUSTEES) LIMITED as new trustee, please return captioned documents to BEA branch or mail to MPF Administration Centre, 32<sup>nd</sup> Floor, BEA Tower, Millennium City 5, 418 Kwun Tong Road, Kowloon, Hong Kong.  
填妥本表格後，請新僱主連同「僱主 – 資金轉移申請表」一併交回新受託人。如新僱主選擇東亞銀行(信託)有限公司為新受託人，請將上述文件一併交回東亞銀行分行，或寄回：香港九龍觀塘道418號創紀之城五期東亞銀行中心32樓，強制性公積金行政中心。
- (iv) If all or any of the accrued benefits in an account of Member are transferred to another account of the Member within the same scheme, then the transferred benefits will remain invested in the same manner as they were invested immediately before the transfer, unless the Member otherwise instructs as permitted under the governing rules.  
如成員的一個賬戶內的全部或部分累算權益，轉移至成員在同一計劃中的另一個賬戶，則轉移權益仍維持按照在緊接轉移之前一樣的方式投資，但如成員在管限規則准許下另作指示，則屬例外。
- (v) If Member wishes to transfer his / her accrued benefits from an MPF scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy ("DIS") if Member either (a) does not give or has not given any investment instructions for the account to the new trustee or (b) has given investment instructions for the account to invest accrued benefits according to the DIS. Member should approach the new trustee to seek clarification, where necessary. If Member wishes to change or specify an investment instruction for the account in the new scheme, please also approach the new trustee.  
如成員欲把累算權益從一個強積金計劃轉移至另一個強積金計劃，請留意轉入賬戶的權益將會如何投資。一般而言，如成員(a)沒有或尚未就有關賬戶向新受託人給予任何投資指示；或(b)已就有關賬戶給予投資指示，要求把累算權益按照預設投資策略投資，則轉入該賬戶的權益將按照預設投資策略投資。如有需要，請向新受託人查詢詳情。如欲就新計劃的賬戶更改或給予投資指示，亦請聯絡新受託人。
- (vi) If Member has reached, or is approaching, the age of 50 and his / her accrued benefits are currently invested according to the DIS of the scheme, Member should be aware that the de-risking mechanism of the DIS starts at the age of 50. If the annual de-risking of his / her investment in the DIS and his / her transfer request take place at around the same time, the approved trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant approved trustee(s) if Member wishes to know the details of how the approved trustee(s) will handle these transactions.  
如成員已年滿或快將年滿50歲，而現時其累算權益是按照計劃的預設投資策略投資，請留意預設投資策略的降低投資風險機制，會由計劃成員年滿50歲開始運作。如計劃的核准受託人在預設投資策略下按年降低其投資風險的時間，與接獲其轉移權益申請的時間相當接近，該計劃的核准受託人將根據其運作程序及在符合《強制性公積金計劃條例》規定的情況下，訂定處理降低風險及轉移權益的次序。如欲瞭解核准受託人如何處理該等交易，請向相關核准受託人查詢詳情。

<b>Part I</b>		
<b>Transfer Details of Scheme Member</b>		
<b>第一部分 計劃成員轉移資料</b>		
Name in English (same as HKID Card / Passport) 英文姓名(與香港身份證/護照相同)		Name in Chinese 中文姓名
HKID Card No. 香港身份證號碼		Passport No. (ONLY for member without HKID Card) 護照號碼(本欄僅供沒有香港身份證的成員填寫)
Date of Employment with New Employer (dd/mm/yyyy) 受僱於新僱主日期(日/月/年)	Date of Employment with Existing Employer (dd/mm/yyyy) 受僱於現時僱主日期(日/月/年)	Commencement Date for Vesting Entitlement (dd/mm/yyyy) 歸屬權益起計日期(日/月/年)
<b>Part II</b>		
<b>Details of Existing Employer</b>		
<b>第二部分 現僱主資料</b>		
Name of Existing Employer 現僱主名稱		Contact Person 聯絡人
Mobile Phone / Day Time Contact No. 手提電話/日間聯絡電話號碼		Email Address (if any) 電郵地址(如有)
Trustee Name of the Existing Employer 現僱主的受託人名稱		
Scheme Name of the Existing Employer 現僱主的計劃名稱		Relevant Scheme No. 有關計劃編號
<b>Part III</b>		
<b>Details of New Employer</b>		
<b>第三部分 新僱主資料</b>		
Name of New Employer 新僱主名稱		Contact Person 聯絡人
Mobile Phone / Day Time Contact No. 手提電話/日間聯絡電話號碼		Email Address (if any) 電郵地址(如有)
Trustee Name of the New Employer 新僱主的受託人名稱 <b>Bank of East Asia (Trustees) Limited 東亞銀行(信託)有限公司</b>		
Scheme Name and Relevant Scheme No. of the New Employer 新僱主的計劃名稱及有關計劃編號 <b>BEA (MPF) Industry Scheme No. 東亞(強積金)行業計劃編號</b>		
<b>E A I</b> <input type="text"/>		

Sponsor: The Bank of East Asia, Limited  
保薦人：東亞銀行有限公司

Trustee, Custodian and Administrator: Bank of East Asia (Trustees) Limited  
受託人、保管人及管理人：東亞銀行(信託)有限公司

Website : www.hkbea.com  
網址

Email : BEAMPF@hkbea.com  
電郵

BEA (MPF) Hotline : +852 2211 1777  
東亞(強積金)熱線  
(Operated by Bank of East Asia (Trustees) Limited)  
(由東亞銀行(信託)有限公司運作)

Fax no. : 3608 6003  
傳真號碼

**Part IV Declaration and Authorisation**  
**第四部分 聲明及授權**

By signing this form, it is agreed that 若閣下簽署此表格即表示閣下同意：

1. The Existing Employer and the New Employer confirm that the above-named person in Part I is a Member of the MPF scheme of the Existing Employer and the accrued benefits of the Member is to be transferred to the MPF scheme of the New Employer as a result of transfer of employment between associated companies or change of business ownership i.e. the conditions under Section 12A(6) of the Mandatory Provident Fund Schemes Ordinance.  
現僱主和新僱主確認在第一部分人士為現僱主的強積金計劃之成員，並在該成員因受僱於另一間有聯繫公司或另一個新業務擁有人後，將其累算權益轉移至新僱主的強積金計劃內，而此轉移是符合強制性公積金計劃條例第 12A(6) 條的規定。
2. The Existing Employer agrees to release the full amount of the Member's accrued benefits to the New Employer's MPF scheme on or after the employment commencement date with the New Employer as shown on Part I 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 accounts under the New Employer's MPF scheme. In addition the New Employer agrees to assume the liability of the Existing Employer for severance payment or long service payment (SP / LSP) in respect of the Member.  
現僱主同意於第一部分內之受僱於新僱主日期或之後將成員全數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，並將其記入該成員在新僱主的強積金計劃之成員賬戶內。而新僱主亦同意承擔現僱主在該成員的遣散費或長期服務金方面的法律責任。
3. The Existing Employer and New Employer agree that the Member's employment by the New Employer shall be treated as continuous by virtue of employment, for the purpose of determining the Member's vesting entitlement to voluntary contributions upon final termination of employment with New Employer and his / her entitlements under the Employment Ordinance (such as SP / LSP). The Existing Employer agrees to the New Employer's receiving of, if any, all the unvested benefits on final termination of the Member's employment with the New Employer.  
現僱主和新僱主同意，該成員受僱於聯繫公司或新業務擁有人後，就確定其自願性供款之歸屬權益及按照僱傭條例所享有之權益而言（如遣散費/長期服務金），該成員將被視作連續性受僱。現僱主同意該成員於最後終止受僱於新僱主時，新僱主將接收所有非歸屬權益。
4. The Existing Employer and the Member confirm that they have not received any accrued benefits of the Member from the MPF scheme of the Existing Employer.  
現僱主和成員確認他們從未於現僱主的強積金計劃中收取該成員的累算權益。
5. The Member understands that all his / her accrued benefits under the Existing Employer's MPF scheme will be transferred to the New Employer's MPF scheme and agrees to release all personal information from the Existing Employer to the New Employer for the purposes of processing the transfer and all subsequent services.  
成員明白其在現僱主的強積金內之累算權益將會被轉移至新僱主的強積金計劃內並同意現僱主向新僱主提供其一切有關個人資料，以處理其轉移有關手續。
6. 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.  
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，他或她並認可有關係文可能會與現僱主的強積金計劃之規管條文不同。
7. The Member understands and accepts that his / her employment is considered continuous for the purpose of determining his / her vesting entitlement to voluntary contributions and his / her entitlements under the Employment Ordinance as per clause 3 and in consideration thereof understands and accepts that the New Employer may offset SP / LSP against accrued benefits derived from mandatory and voluntary contributions attributable to the employer's contribution of both the Existing Employer and New Employer upon final termination of his / her employment with the New Employer.  
成員明白和接受他或她被視作連續性受僱以確定他或她就以上條款 3 所述自願性供款之歸屬權益，並因此明白和接受於他或她最後終止受僱於新僱主時，其新僱主可將現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須支付予他或她的遣散費或長期服務金。
8. The New Employer and the Member agree to make contribution from the employment commencement date with the New Employer.  
新僱主及成員同意受僱於新僱主開始起計供款。

**Part IV Declaration and Authorisation (Cont.)**  
**第四部分 聲明及授權 (續)**

**Personal Information Collection Statement 個人資料收集聲明**

The information the member provides to the Bank of East Asia (Trustees) Limited (“Trustee”) as the trustee of the BEA (MPF) Industry Scheme (“Scheme”) and The Bank of East Asia, Limited (“Sponsor”) as the sponsor of the Scheme is to enable the Trustee and the Sponsor to carry on their respective retirement and MPF related business and may be used for the purposes of (i) communication with the member, employer and member’s personal representative(s) including the provision of information in relation to the Scheme and accounts; (ii) transferring to any other trustee carrying on retirement business or any association or government authority that exists or is formed from time to time or service providers / agents / contractors (which provide services including but not limited to administrative, telecommunications, data processing and storage in connection with the operation of the Trustee’s and the Sponsor’s retirement business, including MPF and banking services) whether local or overseas but, only in so far as the transfer of such information is necessary for such other person to exercise or perform functions under or for the purposes of the Mandatory Provident Fund Schemes Ordinance (Cap. 485); (iii) disclosing to such other persons to whom disclosure may be required by an order of a court, applicable laws or requirements made under a law, including but not limited to reporting the information to local and foreign tax authorities as required under the laws and regulations for the implementation of automatic exchange of financial account information; (iv) complying with any obligations, requirements, policies, procedures, measures or arrangements for sharing data and information within the group of the Trustee and the Sponsor and/or any other use of data and information in accordance with any group-wide programmes for compliance with sanctions or prevention or detection of money laundering, terrorist financing or other unlawful activities and (v) conducting direct marketing activities on retirement or MPF related products, benefits or services of the Trustee and/or the Sponsor.

成員向東亞(強積金)行業計劃(「本計劃」)的受託人東亞銀行(信託)有限公司(「受託人」)及本計劃的保薦人東亞銀行有限公司(「保薦人」)提供的資料是讓受託人及保薦人得以經營各自的退休及強積金相關業務，並可用於下列用途：(i) 與成員、僱主及成員的遺產代理人通訊，包括提供有關本計劃及帳戶的資料；(ii) 將資料轉移予任何經營退休業務的其他受託人或不時存在或成立的任何協會或政府機關或服務供應商/代理/承辦商(其提供的服務包括但不限於就受託人及保薦人的退休業務運作包括強積金及銀行服務，提供行政、電訊、數據處理及儲貯服務)(不論本地或海外)，但只限於轉移該等資料乃使該等其他人士根據或就《強制性公積金計劃條例》(第485章)行使或履行職責所必要的情況；(iii) 根據法院命令、適用法律或根據某項法律作出的規定而需要向其披露相關資料的其他人士，包括但不限於根據實施自動交換財務賬戶資料的法律及規例要求向本地和外國稅務機關報告相關資料；(iv) 遵守受託人及保薦人集團為符合制裁或預防或偵測清洗黑錢、恐怖分子融資活動或其他非法活動的任何方案就於受託人及保薦人集團內共用資料及資訊及/或資料及資訊的任何其他使用而指定的任何義務、要求、政策、程序、措施或安排；及(v) 進行受託人及/或保薦人的退休或強積金相關產品、利益或服務的直接促銷活動。

The Trustee and the Sponsor intend to use the member’s information provided in this application including the member’s name, address, telephone numbers, email address and other contact details and information for the purposes of (v) above. The Trustee and the Sponsor may not so use the data unless they have received your consent.

受託人及保薦人擬使用在此項申請中提供的成員資料，包括成員的姓名、地址、電話號碼、電郵地址及其他聯絡詳情及資料於上文(v)的用途。除非他們已取得你的同意，否則他們並不可以如此使用你的個人資料。

The information the member provides to the Trustee and the Sponsor is provided on a voluntary basis. However, failure to supply information may result in the Trustee and the Sponsor being unable to accept and process this application or provide retirement and MPF related services.

成員向受託人及保薦人提供資料乃屬自願性質。然而，如未能提供資料，則可能令受託人及保薦人無法接納及辦理此項申請或提供退休及強積金相關服務。

The member (a) may, at any time and without charge, exercise the opt-out right and request the Trustee/ the Sponsor ceases to use the personal data of the member for direct marketing purpose; (b) shall be entitled to access to data or correction of data; or request for information regarding privacy policies and practices and kinds of data held by the Trustee/ the Sponsor, by writing to the below respective address of the Trustee/ the Sponsor:-

成員可以書面方式郵寄至下述受託人/保薦人的地址分別向受託人/保薦人(a)隨時行使其選擇權要求受託人/保薦人停止使用其個人資料於直接促銷用途，而無須支付任何費用；(b)行使權利查閱或更正資料；或查閱有關受託人/保薦人的私隱政策及守則及所持有的資料種類：-

Bank of East Asia (Trustees) Limited	東亞銀行(信託)有限公司	The Bank of East Asia, Limited	東亞銀行有限公司
The Individual Data Protection Officer	個人資料保障主任	The Group Data Protection Officer	集團資料保障主任
Bank of East Asia (Trustees) Limited	東亞銀行(信託)有限公司	The Bank of East Asia, Limited	東亞銀行有限公司
32 <sup>nd</sup> Floor, BEA Tower, Millennium City 5,	香港九龍觀塘道418號創紀之城五期	10 Des Voeux Road Central Hong Kong	香港德輔道中10號
418 Kwun Tong Road, Kowloon, Hong Kong	東亞銀行中心32樓		

Under the Personal Data (Privacy) Ordinance (Cap. 486), each of the Trustee and the Sponsor has the right to charge a reasonable fee for the processing of any data access request.

根據《個人資料(私隱)條例》(第486章)的條款，受託人及保薦人各自有權就處理任何查閱資料的要求收取合理費用。

After a member ceases to be a member of the Scheme, the Trustee and the Sponsor shall continue to hold data relating to such member for a period of 7 years or such other period as prescribed by applicable laws and regulations.

當成員不再是本計劃的成員後，受託人及保薦人會繼續持有有關該名成員的資料7年或按照有關法律和法規所規定的期限。

Trustee reserves the right to modify, update, or revise the Personal Information Collection Statement at any time without prior notice. To ensure members are fully aware of what information we collect, how we use the information, under what circumstances it is disclosed, any such changes will be explicitly communicated through our website or by written correspondence.

受託人保留可隨時且在無需事先通知情況下修改、更新或修訂《個人資料收集聲明》的權利。為確保成員充分了解我們收集的資料、其使用方式、在何種情況下會披露該資料以及有任何變更，我們將透過網站或書面函件明確傳達相關資訊。

We confirm that we have received, read and understood the Explanatory Memorandum of the relevant scheme.

我們確認我們已獲獲、細閱及明白並接受有關說明書所述之內容。

Signature of Member  
成員簽署

Date (dd/mm/yyyy)  
日期(日/月/年)

Authorised Signature with Company Chop of Existing Employer  
現僱主的授權簽署及公司印章

Date (dd/mm/yyyy)  
日期(日/月/年)

Authorised Signature with Company Chop of New Employer  
新僱主的授權簽署及公司印章

Date (dd/mm/yyyy)  
日期(日/月/年)