

Online Application for TVC Account – User Guide

BEA MPF e-Application page allows customers to apply for transfer MPF assets and open MPF accounts much more simply and straightforwardly. You can apply for a Tax Deductible Voluntary Contribution Account via online with an e-Signature using a computer or mobile device.

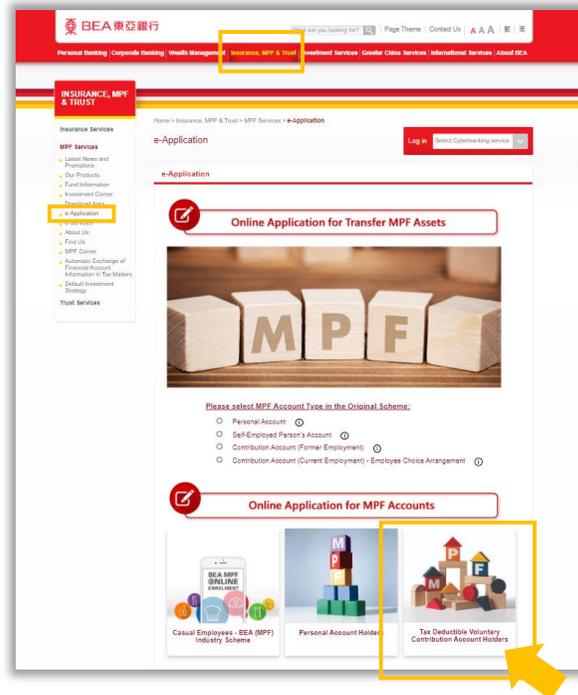


How do you get started?

Internet channel

1. Visit BEA MPF e-Application page via below path:

www.hkbea.com > Home > Insurance, MPF & Trust > MPF Services > e-Application > Tax Deductible Voluntary Contribution Account Holders



2. Visit the e-form directly at www.hkbea.com/mpfetvc/en or scan above QR code

Online Application for TVC Account

1. Choose Participating Scheme & Fill in Personal Information

Fields with * are mandatory

e-Application

Enrolment Type:
TAX DEDUCTIBLE VOLUNTARY CONTRIBUTION ACCOUNT HOLDERS

Participating Scheme:
BEA (MPF) MASTER TRUST SCHEME

Form Name:
MEMBER - PARTICIPATION AGREEMENT (TAX DEDUCTIBLE VOLUNTARY CONTRIBUTION ACCOUNT "TVC") TR 209

Important:

- Please read the **MPF Scheme Brochure** of the BEA (MPF) Master Trust Scheme (the "Scheme") carefully before completing this application form.
- This application form is only applicable to (a) current holders of contribution accounts or personal accounts of MPF schemes; or (b) current members of MPF Exempted ORSO Schemes and must be completed by member.
- This form is not intended for giving any urgent submission of information (e.g. reporting of fraud

Choose ONE of the following to confirm that as a TVC applicant, you fall under the selected category:

- an employee member of an MPF scheme
- a self employed person member of an MPF scheme
- a member of an MPF exempted ORSO scheme
- a personal account holder of an MPF scheme

Surname*
PLEASE ENTER SURNAME

First Name*
PLEASE ENTER FIRST NAME

Name in Chinese
PLEASE ENTER NAME IN CHINESE

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2. Complete Tax Residency Self-Certification

Declare Tax Residence and list the relevant information (if applicable)

i. I hereby declare that, to the best of my knowledge and belief My Tax Residence is

- Hong Kong ONLY, with no tax residence in any other jurisdictions or countries (and my HKID number is my TIN)
- Hong Kong (and the TIN is my HKID No.) and also some other jurisdictions or countries (Please fill out the TIN for all other jurisdictions or countries, other than HK, in (ii).)
- NOT Hong Kong, but instead some other jurisdictions or countries (Please fill out (ii).)

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Online Application for TVC Account

3. Complete Payment Option

Option 1:
Regular Contribution
by Autopay

Option 2:
Irregular Contribution
(minimum HK\$500
each time)

Regular Contribution by Autopay

BEA (MPF) Master Trust Scheme - TVC
BEA 00000000221-000

Name of Party to be Credited (The Beneficiary)
015-514-40-57272-1

My Bank Name and Branch
The Bank of East Asia, Limited

Current A/C Savings A/C

015-PLEASE ENTER

A/C Name as Recorded on Statement / Passbook
PLEASE ENTER

Contribution Period: Monthly (1st day - month end)

Contribution Amount: HK\$ (minimum HK\$100 each time)

HK\$

Monthly Contribution Day: (e.g. 15th / month end)

PLEASE SELECT

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Fill in BEA bank account information (i.e. Account no. and account name) and contribution details

Personal Banking Corporate Banking Wealth Management Insurance, MPF & ...

v. I agree ... time will be ...
used for ... est
contrib ... tribution
payme ...
vi. The dir ... m 4 weeks
after th ...
vii. I agree ... thisation
which I ... ast 7
working ... cancellation is
to take ...
... If further notice.
... to be above
...
CLEAR OK

E-SIGNATURE FOR APPLYING DEBIT AUTHORISATION FOR CONTRIBUTIONS
(MUST BE THE SAME WITH THE SIGNATURE WITH THE BANK ACCOUNT)

CLICK HERE TO SIGN NOW

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e-Signature for confirming the authorisation

Regular Contribution by Autopay

Irregular Contribution (minimum HK\$500 each time)

You can make payments by the following methods*:

1. Cheque
2. eCheque
3. Cyberbanking
4. Inter-bank transfers through Faster Payment System ("FPS")

* For details on payment method, please read the BEA (MPF) Tax Deductible Voluntary Contribution Account Leaflet or call the BEA (MPF) Hotline on 2211 1777 (Operated by Bank of East Asia (Trustees) Limited).

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4. Complete Investment Choice

Choice 1 :
100% Invest in Default Investment Strategy ("DIS")

Choice 2 :
100% Invest in Non-DIS (Please select Constituent Fund(s) and indicate investment allocation)

INVESTMENT CHOICE

- 100% Invest in Default Investment Strategy ("DIS")
- 100% Invest in Non-DIS (Other Constituent Funds)

* Mandatory Field

Name of Fund	Fund Code	Allocation*
<i>Example</i>		
BEA (MPF) Growth Fund	GRF	10%
BEA (MPF) Balanced Fund	BAF	90%

Please click [here](#) for fund details.

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Fund details (i.e. Investment policy and risk class)

5. Read Participation Agreement, Notes, Personal Information Collection Statement & Confirm the Declaration

Click the boxes to confirm and agree the relevant statements

PARTICIPATION AGREEMENT

Parties

- The person named in the Schedule to this Agreement (the "TVC Applicant");
- Bank of East Asia (Trustees) Limited of 32nd Floor, BEA Tower, Millennium City 5, 418 Kwun Tong Road, Kowloon, Hong Kong (the

NOTES ON TAX DEDUCTIBLE VOLUNTARY CONTRIBUTION ACCOUNT

Opening of Tax Deductible Voluntary Contribution Account

1. Tax Deductible Voluntary Contribution refers to contributions paid into a Tax Deductible Voluntary Contribution account of a registered scheme under section 11A of the Mandatory Provident Fund Schemes Ordinance ("MPFSO"). It is a new type of contributions and is different from the voluntary contributions as defined in section 11 of the MPFSO. Scheme member who wishes to make Tax Deductible

PERSONAL INFORMATION COLLECTION STATEMENT

The information the TVC Applicant provides to the Bank of East Asia (Trustees) Limited ("Trustee") as the trustee of the BEA (MPF) Master Trust 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

- You should check ("✓") in the box on the left side of this item if you do not wish the Trustee itself to use your personal data in direct marketing.
- The above represents your present choice whether or not to receive direct marketing contact or information on MPF related products, benefits or services from the Trustee. This replaces any choice communicated by you to the Trustee prior to this application.
- You should check ("✓") in the box on the left side of this item if you do not wish the Sponsor itself to use your personal data in direct marketing.

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DECLARATION

- I certify that I am the account holder of all the accounts(s) to which this form relates.
- I declare that to the best of my knowledge and belief, the information given in this form for the purpose of opening a TVC in the scheme is correct and complete.
- I undertake to advise the Trustee/Sponsor of any change in circumstances which affects the tax residency status of the individual identified in this form or causes the information contained herein to become incorrect or incomplete, and to provide the Trustee/Sponsor with a suitably updated self-certification form within 30 days of such change in circumstances.
- I acknowledge and agree that (a) the information contained in the self-certification (comprising the contents herein described as forming parts of the self-certification) is collected and may be kept by the Trustee/Sponsor for the purpose of automatic exchange of financial information and (b) such information and information regarding the account holder and any reportable accounts(s) may be reported by the Trustee/Sponsor 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 jurisdiction(s) 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) and (c) I agree to the obligation that the account holder must comply with requests made by the Trustee/Sponsor 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.
- I hereby apply to open a TVC under the BEA (MPF) Master Trust Scheme and confirm that I have received, read and understood the above personal information collection statement and the [MPF Scheme Brochure](#) of the BEA (MPF) Master Trust Scheme and undertake to be bound by them.
- I understand that in order to be eligible to open a TVC under the Mandatory Provident Fund Schemes Ordinance (Cap. 485) ("MPFSO"), 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 ("ORS" scheme) who is exempted from the provisions of the MPFSO by virtue of section 5 of the MPFSO (i.e. a member of an MPF Exempted ORSO Scheme).
- I confirm that I am a current member of contribution account(s) of MPF scheme(s) and/or personal account(s) of MPF scheme(s) and/or MPF exempted ORSO scheme(s).
- I accept the responsibility for the investment choice which I have given on this form. I hereby declare that the investment decision indicated in this form has been reached as a result of my own independent judgement and opinion and no investment advice has been given by the Sponsor and the Trustee. In addition, I acknowledge that the Sponsor and the Trustee should not be liable for any loss resulting from the investment choice.

By clicking this box, I agree and confirm to the above statements.

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6. Check and Edit Application Information

Check the Application Details, Personal Information, Tax Residency Self-Certification, Payment Option & Investment Choice

PERSONAL INFORMATION EDIT

Eligibility Category
an employee member of an MPF scheme

Surname
TAI MING

INVESTMENT CHOICE EDIT

100% Invest in Non-DIS (Other Constituent Funds)

Name of Fund	Fund Code	Allocation
BEA (MPF) Growth Fund	GRF	30
BEA (MPF) Balanced Fund	BAF	70
BEA (MPF) Stable Fund	STF	0

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Click "BACK" return to the previous page if you wish to change the information that you provided

Press "EDIT" to change the information if necessary

7. e-Signature & Authentication

After confirmed the application information is correct, sign & enter authentication code

PAYMENT OPTION EDIT

Irregular Contribution (minimum HK\$500 each time)

E-SIGNATURE FOR THE APPLICATION OF TVC

CLICK HERE TO SIGN NOW

AUTHENTICATION

Please type the code shown

14245

PLEASE TYPE THE CODE SHOWN

For any enquiries, you can contact our BEA (MPF) Hotline on (852) 2211 1777 (Operated by Bank of East Asia (Trustees) Limited).

BACK SUBMIT

PAYMENT OPTION EDIT

Irregular Contribution (minimum HK\$500 each time)

CLEAR OK

E-SIGNATURE FOR THE APPLICATION OF TVC

CLICK HERE TO SIGN NOW

AUTHENTICATION

Please type the code shown

14245

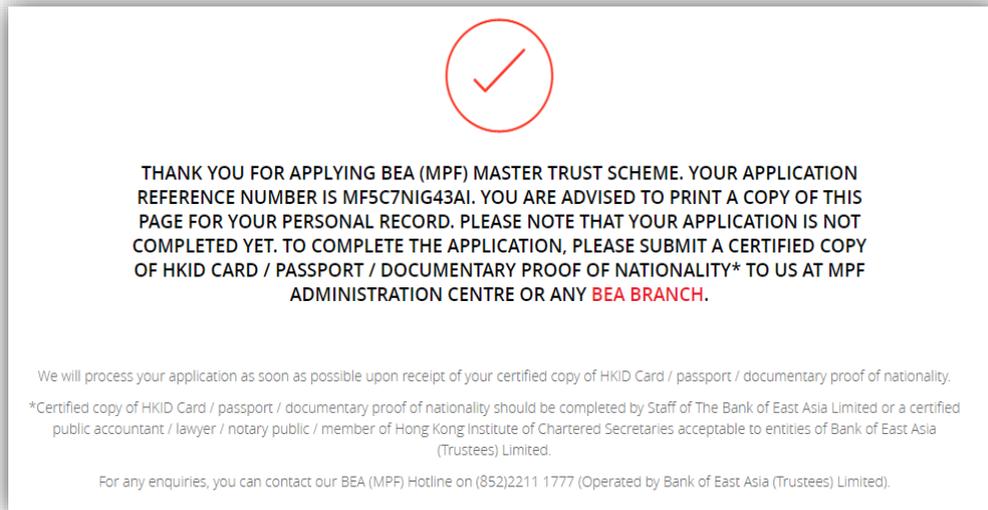
PLEASE TYPE THE CODE SHOWN

BACK SUBMIT

- Mobile / App version – sign by finger
- Desktop version – sign by computer mouse

Online Application for TVC Account

8. Submission Completed



*** With application reference number for your record**

Applicant is required to provide a certified copy of HKID card / Passport / documentary proof of nationality to complete the account setup



Instant confirmation email* for the submission



Issuance of Notice of Participation to member's correspondence address after completion of account setup

