

永明彩虹強積金計劃 — 成員資料更改表格
SUN LIFE RAINBOW MPF SCHEME –
MEMBER INFORMATION CHANGE FORM



重要事項 Important Notes:

1. 本表格所列之更改將取代所有之前已遞交永明信託有限公司(「受託人」)的資料/表格。如本表格沒有更新,現有資料維持不變。The changes filled in this form will supersede any previous information/form(s) which has/have been submitted to Sun Life Trustee Company Limited (the "Trustee"). Information will remain unchanged if no update in this form.
2. 如屬自僱人士,請填寫「自僱人士資料更改表格」。For Self-employed Person, please complete the "Self-employed Person Information Change Form".
3. 本表格內更改的資料,將根據閣下所提供的香港身份證/護照號碼更新至閣下於永明彩虹強積金計劃內所有強積金帳戶。The information updated in this form will be applied to all your MPF accounts under Sun Life Rainbow MPF Scheme according to the HKID / Passport Number provided.
4. 你必須在改變後的 30 天內通知受託人有關的改變並提供適當地更新的自我證明。You must notify the Trustee within 30 days if there is any change in circumstances that makes any of the information provided in the self-certification incorrect or incomplete and provide a suitably updated self-certification form.
5. 請用正楷填寫本表格,並在適當空格內加(✓)號。Please complete this form in BLOCK LETTERS and tick the appropriate boxes.
6. 如須作出任何刪改,請於刪改之位置旁簽署,而該簽署必須與第四部份之成員簽署相同。Please countersign next to any corrections you make on this form with the same member signature as shown in Section IV.



101011007B

第一部分 SECTION I 個人資料 PERSONAL DETAILS

成員姓名

Name of Member

(姓 Surname)

(名 Given Name)

(須與香港身份證 / 護照上的相同 Must be same as HKID / Passport)

成員編號

Member No.

電話號碼

Telephone No.

身份證明文件

☐ 香港身份證號碼 HKID No.

Identity Document

☐ 護照號碼 Passport No. (護照號碼僅供沒有香港身份證的成員填寫 Passport No. is applicable ONLY for member without HKID Card)

第二部分 SECTION II 更新個人記錄 (只需填上適用部分)

UPDATE PERSONAL RECORD (Only Complete Relevant Part(s))

請在適當方格加上剔號 (✓)。Please check (✓) the appropriate box(es).

☐ (i) 更改聯絡資料 Change of Contact Information

(a) 新住址 ^{備註1} (郵政信箱恕不受理) New Residential Address ^{Note1} (P.O. Box will NOT be accepted)

只需提供中文或英文地址 Please provide either Chinese OR English address below:

室 樓 座

大廈 / 屋邨

門牌號碼及街道名稱

地區 / 城市

☐ 香港 ☐ 九龍 ☐ 新界 ☐ 離島 ☐ 中國 (深圳) ☐ 中國 (其他)

☐ 國家

備註 Notes:

1. 如新住址適用於特選私人帳戶,請附上住址證明副本連同此表格一併遞交。可接納為住址證明的文件是由水 / 電 / 煤 / 中央石油氣供應商、銀行、政府部門等在申請日前三個月內發出的文件、收費單或通知書。If the new residential address is applicable to Special Private Account, please attach a copy of address proof and submit with this form. Valid address proof is document, bill or correspondence issued within the last three month from the submission date by utility companies, banks, government department etc.

Flat / Room Floor Block
Building / Estate

Number and
Name of Street

District Area / City

☐ Hong Kong ☐ Kowloon ☐ New Territories ☐ Outlying Islands ☐ China (Shenzhen) ☐ China (others)

☐ Country

(b) 新通訊地址 New Correspondence Address

只需提供中文或英文地址 Please provide either Chinese OR English address below:

- ☐ 以本人於計劃內最新的住址記錄更新本人通訊地址 (如已選擇此項，則無需在本部分提供地址。)
Update my correspondence address according to the latest record of the residential address under the Scheme (If you tick this item, you are not required to provide address in this part.)

室 樓 座

大廈 / 屋邨 _____
門牌號碼及 _____
街道名稱 _____
地區 / 城市 _____

☐ 香港 ☐ 九龍 ☐ 新界 ☐ 離島 ☐ 中國 (深圳) ☐ 中國 (其他)

☐ 國家 _____

Flat / Room Floor Block

Building / Estate

Number and
Name of Street

District Area / City

☐ Hong Kong ☐ Kowloon ☐ New Territories ☐ Outlying Islands ☐ China (Shenzhen) ☐ China (others)

☐ Country

(c) 新電話號碼
New Telephone Nos.

手提電話
Mobile

地區號碼 Country Code

住宅
Home

地區號碼 Country Code

公司
Office

地區號碼 Country Code

(d) 新電郵地址
New Email Address

(e) 國籍
Nationality

☐ (ii) 更改語言選擇 (用作與成員聯絡通訊) Change of Language Selection (For Member Communication)

新語言選擇為: ☐ 中文 ☐ 英文
New Language Selection: Chinese English

☐ (iii) 身份證明文件 Identity Document

☐ 香港身份證 HKID ☐ 護照 Passport
身份證明文件號碼 Identity Document No.

(請附上新的身份證/護照 Please enclose a copy of the new HKID Card / Passport)

☐ (iv) 強積金帳戶結餘短訊提示服務 MPF Account Balance SMS Service



每季以短訊通知成員自帳戶成立日截至季末的 1) 帳戶結餘及 2) 盈 / (虧) 總額。服務詳情如下:
Member will receive a SMS each quarter including the information of 1) account balance and 2) gain/(loss) amount since account setup to the quarter end. Service details are as follows:

1. 本服務包括成員在本計劃下的所有現存帳戶。This service covers all existing accounts of members under the Scheme.
2. 短訊將發出最後更新的有效香港手提電話號碼。SMS will be sent to the latest record of valid Hong Kong mobile number under the Scheme.
3. 短訊語言將根據本計劃最後紀錄的語言選擇。SMS language will follow the latest record of language selection under the Scheme.

- ☐ 本人明白以上服務詳情及條款並同意參加此項服務。I understand the service details and the terms above. I **agree** to enroll this service.
- ☐ 本人要求取消此項服務。I **request to cancel** this service. (只適用於現已使用強積金帳戶資訊短訊提示服務的成員。This request is only applicable if member is currently using this MPF Account Information SMS Service.)

☐ (v) 以電子通訊收取受監管的通知 E-Notification for Regulatory Documents



電子通訊包括電子形式發出的所有受監管的通知 (包括但不限於成員通知書、成員權益報表、基金便覽、強積金計劃說明書及其補充資料)。要登記這項服務, 必須提供你的電郵地址或香港流動電話號碼。登記後, 本公司將不再郵寄報表。我們將以電郵或短訊 (如未有提供電郵地址, 方會發出短訊) 通知閣下在網上退休金服務中心查閱相關的受監管文件/報表。如閣下欲更改電郵地址、香港流動電話號碼或取消此項服務, 請至少在 14 天前透過本公司之網上退休金服務中心或聯絡客戶服務熱線遞交通知, 或填妥及寄回更改表格給本公司辦理。

This e-notification covers all regulatory notifications (including but not limited to the member notice, annual member benefit statement, fund fact sheets, MPF Scheme Brochure and addendum of the MPF Scheme Brochure). To register this service, you must provide your email address or HK mobile number. After registration, hard copies of the statements will no longer be sent out. You will receive an email / SMS reminder (SMS would only be sent if no email address is provided) whenever your regulatory related statement/notice is ready for viewing at the Online Pension Services Center. After change your email address, mobile number or you want to cancel this service, please inform us at least 14 days in advance by submitting your request through our Online Pension Services Centre or contact our Sun Life Pension Services Hotline, or complete and return the Information Change Form.

- ☐ 本人明白以上服務詳情及條款並同意參加此項服務, 電郵或短訊將發送至本人在本計劃的強積金帳戶的電郵地址/香港流動電話號碼 (如未有提供電郵地址, 短訊方會發出)。I understand the service details and the terms above, email/ SMS reminder will be sent to the email address/ HK mobile number of my MPF account record under the Scheme (SMS would only be sent if no email address is provided). I **agree** to enroll this service.
- ☐ 本人要求取消此項服務。I **request to cancel** this service. (只適用於現已使用電子通訊服務的成員。This request is only applicable if member is currently using this E-Notification Service.)

☐ (vi) 更改姓名或簽署式樣 ^{Note 2} Change of Name or Signature Specimen

成員姓名

Name of Member

(英文 English)

(姓 Surname)

(名 Given Name)

(須與香港身份證 / 護照上的相同 Must be same as HKID / Passport)

成員姓名

Name of Member

(中文 Chinese)

(姓 Surname)

(名 Given Name)

(須與香港身份證 / 護照上的相同 Must be same as HKID / Passport)

稱銜

☐

先生 Mr

Title

☐

女士 Ms

新簽署式
New Signature Specimen

☐ (vii) 帳戶文件要求 Request of Account Document

☐ 最近期的成員權益報告 The latest Member Benefit Statement

☐

由

from

(月/月/年年)至

(MM/YY) to

(月/月/年年) 的供款報告

(MM/YY) Contribution Statement

☐ 強積金帳戶結餘摘要 MPF Account Balance Summary

☐ 其他 Others (請列明 please specify) :

☐ (viii) 其他更改 Other Changes (請列明 Please specify)

備註 Notes:

2. 若需要更改登記於計劃內的姓名，你需要附上結婚證書及新身份證之副本或附上改名契及新身份證之副本。閣下的現有成員簽署式樣（後頁）須與行政管理人記錄相符，以上之新簽署式樣方可生效。 For change of name to be registered in our records you must attach a copy of the Marriage Certificate and your new Hong Kong Identity Card or a copy of the Deed Poll and your new Hong Kong Identity Card. The above New Signature Specimen will be effective provided that your existing signature specimen (next page) is consistent with the Administrator's record.

第三部分 SECTION III

個人資料收集聲明 (2018-03 版本)

PERSONAL INFORMATION COLLECTION STATEMENT (Version 2018-03)

申請人／成員明白及同意永明信託有限公司(「受託人」)可以將其所收集的任何個人資料(不論由此申請表所收集或由其他途徑取得)作以下用途:(i)處理成員的此項申請及任何其他申請;(ii)為申請人／成員參與本計劃;(iii)管理成員於本計劃的供款和累算權益的事宜;(iv)進行客戶調查;(v)為客戶研究及設計金融、保險或退休金產品;(vi)為申請人／成員甄選及參與獎賞、忠實或特選客戶計劃;(vii)因上述目的與成員聯絡;(viii)與上述目的直接有關的任何其他目的;及(ix)為遵守適用的法例、法規或法庭命令。

受託人亦可使用申請人／成員的聯絡資料,基本個人資料投資選擇及累算權益,就本計劃的產品的推廣資訊,以包括電話、郵件、電郵、電話短訊或任何電子信息等方法聯絡申請人／成員。除非得到申請人／成員同意(包括表示不反對),否則受託人不可使用申請人／成員資料為該用途。若申請人／成員不同意接受此等推廣資訊,可於表格的聲明和授權部份適當位置填上剔號。

受託人可為以上目的披露申請人／成員的個人資料予(a)為協助受託人就上述用途(不論在香港或其他地方)而提供服務的第三方,包括計劃管理人(條件是有關承辦商須把所有個人資料保密並只會為提供有關服務而使用個人資料);(b)申請人／成員的銀行作繳款用途;(c)申請人／成員的保險經紀(如有);(d)申請人／成員的強積金中介人;(e)受託人的關連公司(根據公司條例訂明)包括保險公司及金融服務機構;(f)受託人及其關連公司(不論在香港與否)為遵守監管當局或其他機構發出之指引或就其就法例、法規或法庭命令所約束或規定之責任而需向其作出披露的任何人士;(g)有關僱主;及(h)按法例要求或准許的其他人士。

受託人可就法例准許或於獲得申請人／成員的同意後披露或將申請人／成員的個人資料作其他用途。

申請人／成員明白申請人／成員所提供之個人資料均屬自願,然而倘若未能提供所需個人資料,可導致受託人無法處理申請人／成員的申請。申請人／成員有權查閱及要求更正受託人持有有關成員的個人資料,有關要求可以書面形式郵寄至香港九龍紅磡德豐街 18 號海濱廣場一座 10 樓卓譽金融服務有限公司退休金管理部經理。受託人可就處理任何該等要求收取合理費用。

☐ 若閣下不同意收取由受託人發出的推廣資訊,請於方格內填上剔號。

Applicant/Member(s) understand(s) and consent(s) that, any personal data collected by Sun Life Trustee Company Limited ("Trustee") (whether collected in this application form or otherwise) may be used by the Trustee for the following purposes: (i) processing this application and any other applications applicant/member(s) make(s); (ii) enrolling applicant/member(s) in the Scheme; (iii) administering and managing applicant/member(s)' contributions and accrued benefits under the Scheme; (iv) conducting customer surveys; (v) researching and designing financial, insurance or pensions products for customer use; (vi) selecting and participating in reward, loyalty or privileges program and related service for applicant/member(s); (vii) contacting applicant/member(s) for the above purposes; (viii) purposes which are directly related to the above purposes; and (ix) complying with applicable laws, regulation or court order.

The Trustee may also use applicant/member(s)' contact details, demographic information, investment choices and accrued benefits to contact applicant/member(s) with marketing information regarding the Scheme, including by phone calls, mail, email, SMS or any type of electronic message. The Trustee may not so use applicant/member(s)' data unless the Trustee have received applicant/member(s)' consent (which includes an indication of no objection). Tick the box in appropriate area under the Declaration and Authorization in the form if member(s) do(es) not consent to receive such marketing information.

The Trustee may disclose member(s)' personal data for the above purposes : (a) to third parties who provide services in Hong Kong or elsewhere which assist the Trustee to carry out the above purposes, including scheme administrator (provided that such contractors are required to keep all such personal data confidential and may only use the personal data to provide those services); (b) to applicant/member(s)' bank for payment purposes; (c) to applicant/member(s)' insurance broker (if any); (d) to applicant/member(s)' MPF intermediaries; (e) to the Trustee's related companies (as defined in the Companies Ordinance) including insurance companies and financial services companies; (f) to any person to whom the Trustee or its related companies (inside or outside Hong Kong) is under an obligation to make disclosure under the requirements of any law, regulation or court order binding on or applying to or to which the Trustee or its related companies (inside or outside Hong Kong) is subject to, or under and for the purposes of any guidelines issued by regulatory or other authorities with which the Trustee or its related companies (inside or outside Hong Kong) is expected to comply; (g) relevant employer(s) and (h) as otherwise required or permitted by law.

The Trustee may also use and disclose member(s)' personal data in other ways with applicant/member(s)' consent or as otherwise required or permitted by law.

Applicant/Member(s) understand(s) that the information applicant/member(s) gave is voluntary, but failure to provide the requested personal data may mean the Trustee is unable to process applicant/member(s)' application. Applicant/Member(s) has/have the right to seek access to and request correction of any personal data the Trustee holds by sending a written request to The Manager, Pensions Administration Department, BestServe Financial Limited, 10/F, One Harbourfront, 18 Tak Fung Street, Hung Hom, Hong Kong. The Trustee may charge a reasonable fee for the processing of any such requests.

☐ Please tick if you do not wish to receive marketing information from the Trustee.

第四部分 SECTION IV 聲明 DECLARATION

本人(作為成員身份),謹此確定以上細則/或附上之資料(如有)皆為真實正確。

I, the Member, hereby confirm that the above details and the attached information (if any) are true and correct.

備註 Notes:

- 成員簽署必須與之前遞交予本計劃行政管理人的式樣相同。如成員簽署與紀錄不符,我們將邀請閣下到客戶服務中心作身份核實。中心職員將要求閣下出示香港身份證(或護照)以核實閣下身份。如閣下已忘記簽署式樣,請攜同此表格及香港身份證(或護照)親臨我們的客戶服務中心作身份核實。Signature of member must be same as the previous specimen submitted to the Administrator of the Scheme. If your signature does not match with our record, you will be invited to our Client Service Centre for identity verification. Our staff will request you to present your HKID card (or passport) to verify your identity. If you forget your signature specimen, please bring along this form and your HKID card (or passport) in person to our Client Service Centre for identity verification.

成員簽署^{Note3} Signature of Member^{Note3}

日期
Date

--	--	--	--	--	--	--	--	--	--

日/月/年
DD/MM/YYYY

請將填妥表格交予:

永明彩虹強積金計劃行政管理人 — 卓譽金融服務有限公司
香港九龍紅磡德豐街 18 號海濱廣場一座 10 樓

電話: 3183 1888 傳真: 3183 1889 網址: www.sunlife.com.hk

Please send the completed form to :

Sun Life Rainbow MPF Scheme, The Administrator, BestServe Financial Limited
10/F, One Harbourfront, 18 Tak Fung Street, Hung Hom, Kowloon, Hong Kong

Tel: 3183 1888 Fax: 3183 1889 Website: www.sunlife.com.hk