Principal® 信安   AXA 安盛

CHANGE OF MEMBER / SELF-EMPLOYED PERSON PERSONAL PARTICULARS
會員/成員/自僱人士個人資料更改

Please tick the appropriate box and fill in only those changes that are required. 請於適當位置加上✓號並只需填寫資料更改的部份。

(1) Scheme and Member Information計劃及會員/成員資料(This section must be completed此部份必須填寫**)**

Member Name
會員/成員姓名 ______________________________

Contract no.
合約編號 |__|__|__|__|__|__|__|__|

Membership no.
會員/成員編號 |__|__|__|__|__|__|__|__|

HKID card no.
香港身份證號碼 |__|__|__|__|__|__|__|__|( )

or 或 Passport no. 護照號碼 ______________________________
(for non HKID holders非身份證持有人適用)

(2) Change Date of Birth 更改出生日期

Date of Birth
出生日期 |__|__| D日 |__|__| M月 |__|__|__|__|Y年

Note注意: 1. Please submit the form with a photocopy of your HKID card or passport. 閣下在遞交本表格時,請附上閣下的香港身份証/護照副本。
2. If you have invested in Default Investment Strategy, it may trigger an ad hoc de-risking after the date of birth is updated. 若閣下投資於預設投資策略，當更改出生日期後，可能會進行一次降低投資風險。

(3) Change of Personal Details 個人資料更改詳情 (Please complete details to be changed 請填妥所需更改的資料)

- Member or Employer of the Member should notify the Trustee within 30 days of the change. 會員/成員或會員/成員之僱主須於會員/成員資料更改後 30 內通知受託人。
- Please complete the overleaf for the change of member's voluntary contributions. 如需更改會員/成員自願性供款，請填寫背頁。

(Please tick and complete as appropriate. 請選擇及填妥需要更改的資料)

☐ Member Name
(Please attach a copy of deed poll and HKID card)
成員姓名
(請附上改名契及香港身份證副本)

______________________________ English 英文
Surname Given Name

______________________________ Chinese 中文
姓 名

☐ Nationality
國籍

____
(Please attach a copy of nationality proof bearing photograph 請附上附有相片的國籍證明副本)

☐ Residence Address
(P.O. Box Address is not accepted)
住址
(不接納郵箱地址)

Room/Flat 室 | Floor 樓層 | Block 座 | Name of Building 大廈名稱

Street No.街/道號碼 | Name of Street 街/道名稱 | District 區/City 城市

☐Hong Kong 香港 ☐Kowloon 九龍 ☐N.T. 新界 | Country 國家 | Post Code/Zip Code 郵政編碼/郵遞區號碼

☐ Mailing Address
通訊地址

Room/Flat 室 | Floor 樓層 | Block 座 | Name of Building 大廈名稱

Street No.街/道號碼 | Name of Street 街/道名稱 | District 區/City 城市

☐Hong Kong 香港 ☐Kowloon 九龍 ☐N.T. 新界 | Country 國家 | Post Code/Zip Code 郵政編碼/郵遞區號碼

DEFKBC-CHGMBR *OBJTCHGMBREXT* F5_EECHG_v.1.May23

❑ Mobile no.* 手提號碼* |__|__|__|__|__|__|__|__|

❑ Daytime contact no. 日間聯絡號碼 _______ - _______ - __________

Country Code 國家號碼 | Area Code 地區號碼 | Phone No. 電話號碼

If it is non-HK local phone number, please fill the phone number in the field “Daytime contact no.” and provide the country code and area code.
如非本港電話號碼，請於日間聯絡號碼一欄填寫電話號碼並提供國家號碼及地區號碼。

❑ Fax no. 傳真號碼 |__|__|__|__|__|__|__|__|

❑ E-mail address* 電子郵箱* |____|

❑ I wish to change/update my communication language preference to 本人欲更改通訊語言選擇為:

❑ Chinese 中文 ❑ English 英文

(Chinese is the default language if you do not indicate your preference. 如沒指示將預設為“中文”。)

❑ Others changes (Please specify) 其他更改(請說明) ______________________________

* Change of mobile no. and email address will also apply to your registered E-Notification Service.
更改之手提號碼及電子郵箱亦適用於閣下已登記之電子通訊服務。

Remarks 備註:
If you have changed your telephone number, residence address or mailing address that involves in a change of jurisdiction or country, or you have changed your tax residence, please provide an updated Self-Certification Form-Individual to Principal within 30 days of such changes. The form can be downloaded from our website at www.principal.com.hk
若閣下更改電話號碼、住址或通訊地址，而涉及改變司法管轄區或國家，又或是更改稅務居住地，請於更改生效後 30 天內向信安提交一份更新的「自我證明表格 – 個人」。表格可於本公司網頁 www.principal.com.hk 下載。

(4) Register Principal E-Notification Service 登記信安電子通訊服務

❑ SMS Subscribe for Monthly Account Balance SMS service. Display language will be same as communication language preference in Part (3). Chinese is the default language if you do not indicate your preference.
登記每月帳戶結餘短訊服務。顯示語言將與通訊語言選擇相同。如沒指示將預設為 “中文”。

❑ Register for E-Notification Service.
登記電子通訊服務。

(To register for this service, you must provide your email address on page 2. For Terms of Prior Consent of the E-Notification Service, please refer to page 5. 如要登記這項服務，閣下必須於第二頁提供您的電子郵箱。有關事先同意電子通訊服務之條款和細則，請參閱第五頁。)

(5) Change of Member’s Voluntary Contribution Details (not applicable to Personal Account Members) 更改會員/成員自願性供款詳情 (不適用於個人帳戶會員/成員)

❑ Starting from the contribution period which will commence from ______________ (DD/MM/YYYY) (1 month notice required), I wish to make Member’s Voluntary Contributions as indicated below:
由供款期開始於______________ (日/月/年)起(請提供一個月通知期)，本人欲作出會員/成員自願性供款如下：

Please select one 請選擇以下其中一項：	Contribution % or Fixed Amount 供款百分比或指定金額
❑ Fixed amount per contribution period 每供款期指定金額	
❑ Relevant Income x Contribution % 有關入息 x 供款百分比	
❑ Relevant Income x Contribution % – Mandatory Contribution 有關入息 x 供款百分比 – 強制性供款	
❑ Relevant Income (subject to the maximum level of relevant income defined in MPF Ordinance) x Contribution % 有關入息(受強制性公積金條例所定的最高有關入息水平限制) x 供款百分比	
❑ As specified by the Employer in the Schedule to Participation Agreement, as amended from time to time. 由僱主於參加同意書附表(及其不時作出的修訂)內指明	

❑ Starting from the contribution period which will commence from ______________ (DD/MM/YYYY) (1 month notice required), I do not wish to make any Member’s Voluntary Contributions.
由供款期開始於______________ (日/月/年)起(請提供一個月通知期)，本人不欲作出任何會員/成員自願性供款。

Note: Member should give at least 1 month prior Notice to the Trustee for changes relating to Member's Voluntary Contributions.
注意: 會員/成員應最少於1個月前就更改會員/成員自願性供款事宜通知受託人。

(6) Change of Mandatory Contribution Details (for Self-Employed Person)
更改強制性供款詳情 (只適用於自僱人士)

☐ **Option 1 – Suspension of Contributions 選項 1 – 暫停供款**

I hereby declare that I have suffered a loss from my business(es) from __________________________ (DD/MM/YYYY) and would like to suspense all my contributions until my relevant income exceeds the minimum level of relevant income as specified in Section 3 of Schedule 2 to the Mandatory Provident Fund Schemes Ordinance. (Note: The net loss is calculated in accordance with Part 4 of Inland Revenue Ordinance (Cap. 112)).

本人就此聲明本人所經營的業務於__________________________ (日/月/年)日起蒙受虧損，本人欲暫停支付所有供款直至有關入息超越強制性公積金計劃條例附表 2 第 3 條所指的最低有關入息水平為止。(註: 淨虧損是根據稅務條例(第 112 章)第 4 部份計算。)

☐ **Option 2 – Resumption of Contributions 選項 2 – 恢復供款**

I would like to resume all my contributions effective from __________________________ (DD/MM/YYYY).

本人欲於__________________________ (日/月/年)日起恢復供款。

Personal Information Collection Statement 個人資料收集說明書

The provision of information and other personal data by you is on a voluntary basis. However, failure to provide us with the information and other personal data as requested may result in your application/instruction not being able to be processed. The information and other personal data provided by you will only be accessed and handled by Principal Trust Company (Asia) Limited ("the Trustee and Administrator") and its affiliate(s), Principal Insurance Company (Hong Kong) Limited ("the Sponsor"), AXA China Region Insurance Company Limited and its subsidiary intermediary ("the Intermediary") and the relevant persons stated herein below.

The information and other personal data collected from you from time to time will be used for the purposes of: (1) processing your application for participation under Principal MPF – Smart Plan / Simple Plan ("the Scheme"); (2) administering and managing your contributions and accrued benefits under the Scheme; (3) carrying out your instructions or responding to any enquiries given or purporting to be given by you or on your behalf; (4) direct marketing of mandatory provident fund ("**MPF**"), retirement schemes, MPF and retirement schemes related services and products of Principal Trust Company (Asia) Limited and its member company(ies); (5) providing MPF and retirement schemes related services; (6) maintaining statistical data and providing a database for product and market research; (7) compliance with applicable laws, regulations, guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of financial services providers within or outside the Hong Kong Special Administrative Region ("Hong Kong"), including but not limited to the Foreign Account Tax Compliance Act and the Common Reporting Standard; and (8) any other purposes relating or incidental to the above.

Furthermore, for the purpose of automatic exchange of financial account information, such information and information regarding the account holder and any reportable account(s) may be reported by the Trustee and its member company(ies) to the Inland Revenue Department of the Government of Hong Kong ("**IRD**") 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 of the Laws of Hong Kong). You shall advise us of any change in circumstances which affects the tax residency status of the account holder, and to provide us with a suitably updated self-certification form within 30 days of such change in circumstances.

You may visit the IRD website that sets out information relating to the implementation of automatic exchange of financial account information in Hong Kong: http://www.ird.gov.hk/eng/tax/dta_aeoi.htm.

Your personal data (name, contact details and account records) may be used for direct marketing of MPF products, retirement schemes, MPF and retirement schemes related services and products of the Trustee and its member company(ies) only with your consent. If you do not wish your personal data being used for direct marketing as described herein, you should indicate your objection by ticking ("✓") the relevant box under Declaration.

Your personal data may be transferred/disclosed to the following parties (whether within or outside Hong Kong) for any of the purposes stated above: (1) any agent, contractor, third party service provider, or any company(ies) within the same group of companies to which the Trustee belongs which provides administrative, telecommunications, computer, data processing or storage, marketing, professional or other services to the Trustee in connection with their business operations; (2) any person to whom the Trustee is under an obligation to make disclosure under the requirements of any laws and regulations binding on the Trustee or any of its member company(ies) or under and for the purposes of any guidelines issued by regulatory, tax or other authorities with which the Trustee or its member companies are expected to comply; and (3) any actual or proposed assignee of the Trustee or participant or sub-participant or transferee of the rights of the Trustee in respect of you.

Under the Personal Data (Privacy) Ordinance (Cap.486 of the Laws of Hong Kong), you have a right to request access to and correction of any of your personal information held by the Companies and to request not to use your personal data for direct marketing purpose as stated above. The aforesaid requests can be made in writing to: Data Protection Officer, Principal Trust Company (Asia) Limited, 30/F, Millennium City 6, 392 Kwun Tong Road, Kwun Tong, Kowloon, Hong Kong. If you have any questions or wish to know more about our privacy policy, please send your enquiry to the above address or contact us at (852) 2802 2812 / (852) 2885 8011.

閣下提供的資料及其他個人資料純屬自願性質。然而，如未能提供所需資料及其他個人資料，可能導致閣下的申請/指示不獲處理。信安信託(亞洲)有限公司(「受託人及管理人」) 及其相關聯公司 、 美國信安保險有限公司(「保薦人」)、安盛金融有限公司及其附屬中介人(「中介人」)及以下所指的相關人士/機構使用及處理。

向閣下所收集的資料及其他個人資料將會用作下列用途：(1) 處理閣下參與信安強積金-明智之選/易富之選(「該計劃」)的申請； (2) 處理及管理閣下於該計劃的供款及累算權益；(3) 執行閣下的指示或答覆閣下或閣下代表的查詢；(4) 直接促銷信安信託(亞洲)有限公司及其成員公司的強制性公積金(「強積金」)產品、退休計劃、強積金及退休計劃的相關服務及產品；(5) 提供強積金及退休計劃的相關服務；(6) 維持統計數據及用作產品及市場研究資料庫；(7) 遵守有關不論於香港特別行政區境內或境外的任何法律、監管、政府、稅務、執法或其他機關,或金融服務供應商的自律監管或行業組織或協會作出或發出的任何適用的法律、規則、指引或指導, 包括但不限於《外國帳戶稅務合規法案》及共同匯報標準；及 (8) 用作與任何上述有關的用途。

除上述以外，受託人及其成員公司可根據<稅務條例>（香港法例第112章)有關交換財務帳戶資料的法律條文，及作自動交換財務帳戶資料用途，把該等資料和關於帳戶持有人及任何須申報帳戶的資料向香港特別行政區政府稅務局(「**稅務局**」)申報，從而把資料轉交到帳戶持有人的稅務管轄區的稅務當局。如情況有所改變，以致影響帳戶持有人的稅務居民身分，閣下會通知本公司，並會在情況發生改變後30日內，向本公司提交一份已適當更新的自我證明表格。

閣下可參閱稅務局網站 http://www.ird.gov.hk/chi/tax/dta_aeoi.htm 以了解香港實施自動交換財務帳戶資料的詳情。

只有在閣下的同意下，閣下的個人資料（姓名，聯絡資料和戶口記錄）或會用於直接促銷本公司及其成員公司的強制性公積金的產品，退休計劃，強積金相關的服務和產品。 如閣下不欲閣下的個人資料被用於如本文所述之直接促銷，您應在聲明部分有關的方格內加上(「✓」)號，以表示不同意。

閣下的個人資料可能轉移/披露予以下的人士 (不論在香港特別行政區內外) 作為上述所載的任何用途：(1) 在業務上向受託人提供行政、電訊、電腦、數據處理或儲存、市場推廣、專業或其他任何服務的代理、承包商、第三方服務供應商或本公司所屬公司集團旗下的任何公司；(2) 就受託人或其成員公司所需遵守的法律及規則要求，或按監管機構、稅務或其他主管機構要求受託人或其成員公司需遵守的指引，受託人因而有責任要向其披露的任何人士；及 (3) 允許任何受託人的實際或建議承讓人或受託人所持客戶權益的分享者、再分享者、受讓人擁有有關客戶資料的權利。

根據個人資料(私隱)條例（香港法例第486章），閣下有權要求查閱及更正該公司所持有閣下的個人資料及要求閣下的個人資料不被用作上述的直接促銷用途。上述要求可以書面形式通知保障資料主任，信安信託(亞洲)有限公司，香港九龍觀塘觀塘道392號創紀之城6期30樓，閣下如有任何疑問或欲進一步了解本公司的私隱政策，請致函到上述地址或致電（852）2802 2812 / (852) 2885 8011與本公司聯絡。

Declaration 聲明

(1) I hereby acknowledge that I have read and fully understand the MPF Scheme Brochure and all relevant information in connection with this Application, and all the information and documents submitted with this Application are true, accurate and complete.
(2) I accept the responsibility for the decisions I have made on this Application and acknowledge that the Entity shall not be liable for any loss due to an inappropriate choice made by me.
(3) I hereby authorize the Trustee / Administrator to accept and act on facsimile instructions and agree to indemnify the Trustee / Administrator against any action, proceeding, claim, loss, damage, cost or expense which may be brought against the Trustee / Administrator or suffered or incurred by the Trustee / Administrator arising either directly or indirectly out of or in connection with the Trustee / Administrator accepting facsimile instructions and acting thereon, whether or not the same are confirmed by me in writing, unless due to the wilful default or gross negligence of the Trustee / Administrator. The Trustee / Administrator has the right to determine which forms or other documents of instructions may or may not be accepted by facsimile.
(4) I agree the Entity to record all or any of my telephone conversation(s) with the Entity.
(5) I hereby acknowledge that I have read and fully understood the content of the Personal Information Collection Statement as attached hereto.
(6) I understand that the Trustee and the member company(ies) intends to use my personal data (name, contact details and account records) for direct marketing of mandatory provident fund ("MPF") products, retirement schemes, MPF related services and products as stated in the Personal Information Collection Statement. I also understand that the Trustee and the member company(ies) cannot make such use of my personal data without my consent and will cease to use my personal data for direct marketing purpose upon my written or verbal request. I hereby express my consent to the use of my personal data (as provided/updated by me from time to time) by the Trustee and the member company(ies) (and their agents) for the aforesaid direct marketing purpose. I further understand that should I find such use of my personal data not acceptable, I should indicate my objection by ticking ("✓") the box below.

☐ I object to the proposed use of my personal data in direct marketing

(1) 本人謹此確認本人閱畢並完全明白強積金計劃說明書和所有與此申請相關的資料，及確認就此申請所提供之所有資料及文件均為正確無誤及並無缺漏。
(2) 本人承擔本人就此申請所作出之決定之責任，並承諾貴機構不用承擔因本人不恰當之選擇所導致之任何損失。
(3) 本人同意並授權受託人/ 管理人接受傳真指示及根據指示處理有關事宜。除因受託人/ 管理人之蓄意失責或嚴重疏忽，本人同意賠償受託人/ 管理人因接受傳真指示及根據指示行事(不論本人有否書面確認該傳真指示)而直接或間接招致之任何訴訟、索償、損失、賠償責任、開支或費用。受託人/ 管理人有權決定接受何種傳真表格或指示。
(4) 本人謹此同意貴機構可記錄本人與貴機構之間進行的所有或任何電話談話。
(5) 本人特此確認本人已閱畢並完全明白所附的個人資料收集說明書。

(6) 本人明白受託人或成員公司擬使用本人的個人資料 (姓名，聯絡資料及戶口記錄) 以作出個人資料收集說明書內所述的直接促銷強制性公積金(「強積金」)產品、退休計劃、強積金相關服務及產品。本人亦明白受託人或成員公司在未得本人的同意之前不能如此使用本人的個人資料，受託人或成員公司倘接獲本人之書面或口頭要求，將停止使用本人的個人資料作直接促銷用途。本人現在明確表示同意受託人或成員公司（及其代理）使用本人的個人資料(由本人不時提供/更新)作上述直接促銷用途。本人進一步明白，如本人不接受本人的個人資料用作此用途，本人應在以下方格內加上(「✓」) 號，以表示反對。

☐ 本人反對本人的個人資料被使用於擬作出的直接促銷。

Signed by Member and Employer 會員/成員及僱主簽署

X

Signature of Member 會員/成員簽署
(It must be the same as the record kept by the administrator)
(此簽署必須與行政管理人之紀錄相同)

Date(dd/mm/yyyy) 日期(日/月/年)

X

Signature of Employer with Company Chop
僱主簽署及公司印鑑
(applicable to change in Section (5) only)
(只適用於第(5)部之更改)

Date(dd/mm/yyyy) 日期(日/月/年)

Terms defined in the trust deed of the Plan shall have the same meanings when used in this form.
在本計劃的信託契約中定義的詞語，如在本表格中使用應具相同涵義。

Prior Consent on terms and conditions of E-Notification Service 事先同意電子通訊服務之條款和細則

E-Notification Service covers all notices and documents in electronic form issued by Principal Trust Company (Asia) Limited from time to time which include member benefit statement, notices and fund fact sheets. To register for this service, you must provide your email address. The E-Notification Service shall apply to all your MPF accounts under the MPF scheme you have given consent and will extend to the new MPF account(s) under the same scheme. After registration, we will send the E-Notification to your email address for retrieving the notices and documents on our website. The retention period of member benefit statements and fund fact sheets on the website is for a minimum of 24 months while the notices is for a minimum of 12 months after the issuance of the E-Notification. If we become aware that you could not receive the E-Notification, hard copies of the notices and documents will be sent to your latest correspondence address at no extra cost. Your E-Notification Service remains valid until it is cancelled by following reasons: (i) you cancel the E-Notification Service, (ii) all your MPF accounts have been terminated, (iii) the E-Notification cannot be successfully given to you and no valid email address can be updated from you within a period of 60 days, and (iv) we have been notified the death or mental incapacitation of you. You may revoke your consent to the subscription for E-Notification Service at any time by contacting Principal. If you revoke such consent, you will be unsubscribed from E-Notification Service automatically. A confirmation notice will be sent to you after completion. 電子通訊服務包括信安信託(亞洲)有限公司不時以電子形式發出之所有通告及文件，包括成員權益報表、強積金通告及基金便覽。如要登記這項服務，閣下必須提供您的電子郵箱。電子通訊服務適用於閣下已同意享用此服務的強積金計劃下之所有有效的強積金帳戶，並會延伸至同一計劃下的新強積金帳戶。登記完成後，本公司會發送「電郵提示通知」到閣下的電子郵箱，提醒閣下到本公司網站檢視通告及文件。在發出「電郵提示通知」後，成員權益報表及基金便覽在網站的保留期為至少 24 個月，而強積金通告的保留期則為至少 12 個月。如我們發現閣下未能收到「電郵提示通知」，我們會將文件列印並郵寄到閣下最新的通訊地址，並且不會收取任何額外費用。基於以下原因，電子通訊服務會被取消：(i) 閣下取消電子通訊服務、(ii)閣下的強積金戶口已被終止、(iii) 未能成功發送「電郵提示通知」到閣下的電子郵箱，而閣下並未能於 60 天內向我們更新有效的電子郵箱，及(iv)我們收到閣下的身故/喪失精神行為能力通知。閣下可以隨時聯繫信安要求撤銷同意使用電子通訊服務。如果閣下同意撤銷使用該服務，閣下將自動取消訂閱電子通訊服務。完成更新後，我們將發出確認通知予閣下。

Trustee & Administrator: Principal Trust Company (Asia) Limited 受託人及管理人: 信安信託 (亞洲)有限公司
Sponsor: Principal Insurance Company (Hong Kong) Limited 保薦人: 美國信安保險有限公司
30/F, Millennium City 6, 392 Kwun Tong Road, Kwun Tong, Kowloon, Hong Kong 香港九龍觀塘觀塘道392號創紀之城6期30樓
Customer Service Hotline 客戶服務熱線 : (852) 2802 2812 or或 (852) 2885 8011 Employer Hotline 僱主專線 : (852) 2519 1188 Fax 傳真 :(852) 2827 1707 Website: 網址: www.principal.com.hk