Principal® 信安

CHANGE OF MEMBER / SELF-EMPLOYED PERSON PERSONAL PARTICULARS for PRINCIPAL MPF SCHEME SERIES 800

信安強積金計劃 800 系列之 成員 / 自僱人士個人資料更改

NOTE 注意:

(1) Please fill in the form with **BLOCK LETTERS** 請以正楷填寫本表格。

(2) Your personal particulars (part II to V, except Member's Name, HKID Card/Passport No. and / or Date of Birth can also be updated at our website. 您亦可於信安網站更新您的個人資料（第二至第五部分，姓名、香港身份證/護照號碼及 / 或出生日期除外）。

Go online to paperless! Login via Principal HK website to update your contact details. It's easy and will take effect immediately! 網上管理帳戶、實現無紙化生活！透過登入信安香港網站更新您的聯絡資料，即時生效，簡單快捷！ www.principal.com.hk

PART I – PERSONAL PARTICULARS 第一部份 - 個人資料:

Contract No.合約編號	Member No. 成員編號
Member's Name 成員姓名 (English 英文) Surname 姓 First Name 名	(Chinese 中文) HKID Card / Passport No.* 香港身份證 / 護照號碼 *

PART II – DETAILS OF CHANGES REQUIRED 第二部份 - 更改資料:

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。

Change of Contact Details 更改聯繫資料

NOTE 注意: 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

❑ Residence Address 住宅地址*(The address will automatically apply to ALL accounts maintained with Principal 此(等)地址將自動適用於所有於信安登記之帳戶。)*

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*(The address will automatically apply to ALL accounts maintained with Principal 此(等)地址將自動適用於所有於信安登記之帳戶。)*

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 ______

❑ Daytime contact no. 日間聯絡電話 ______ - ______ - ______ Country Code 國家號碼 Area Code 地區號碼 Phone No. 電話號碼

❑ Mobile No. 手提號碼 ______

❑ Fax No. 傳真號碼 ______

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。

❑ E-mail Address 電子郵箱 ______

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。

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Change of Personal Details 更改個人資料

- For changes of "Member's Name", "HKID Card/Passport No." and / or "Date of Birth", please provide a copy of HKID card/passport and a copy of deed poll for name change if applicable. 更改"姓名"; "香港身份證/護照號碼"及/或"出生日期"，請提供香港身份證/護照副本及改名契副本(如適用)。
- For change of nationality, please provide a copy of nationality proof bearing photograph. 更改"國籍"， 請提供附有相片的國籍證明副本。

❑ Name 姓名 (English 英文) Surname 姓 |_|_|_|_|_|_|_|_|_|_|_|_|_|_|_| First Name 名 |_|_|_|_|_|_|_|_|_|_|_|_|_|_|_|	(Chinese 中文)
❑ HKID Card/Passport* No. 香港身份證/護照*號碼 *(*Please delete the inappropriate 請刪去不適用者)* |_|_|_|_|_|_|_|_|_|_|_|_|( )|	❑ Date of Birth 出生日期 *(DD/MM/YYYY 日/月/年)* *(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中,當更改出生日期後，可能會進行一次降低投資風險。)* |_|_| |_|_| |_|_|_|_|
❑ Nationality 國籍 ____________________	

PART III– COMMUNICATION LANGUAGE 第三部份 – 通訊語言：

❑ 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" 。)

PART IV: REGISTER PRINCIPAL E-NOTIFICATION SERVICE 第四部份 – 登記信安電子通訊服務:

❑ SMS Subscribe for Quarterly Account Balance SMS service. Display language will be same as communication language preference in Part III. Chinese is the default language if you do not indicate your preference.
登記每季帳戶結餘短訊服務。顯示語言將與第三部份通訊語言選擇相同。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 1. For Terms of Prior Consent of the E-Notification Service, please refer to page 3. 如要登記這項服務，閣下必須於第一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，請參閱第三頁。)

PART V & PART VI: 第五部份及第六部份
APPLICABLE for SELF-EMPLOYED PERSON USE ONLY 只供自僱人士填寫

PART V – CHANGE OF VOLUNTARY CONTRIBUTION DETAILS 第五部份 - 更改自願性供款詳情:

EFFECTIVE DATE 生效日期: ____________________
dd/mm/yyyy 日/月/年

1. I understand that this contribution is in addition to the mandatory contribution as required by the Mandatory Provident Fund Scheme Ordinance.
本人明白此乃額外供款，並不包括強制性公積金計劃條例下之強制性供款。
   - ❑ equal to __________% of my relevant income; or
   相當於本人有關入息之 __________%; 或
   - ❑ be a flat amount of HK$ ____________________
   固定金額為港幣 ____________________
2. ❑ Cessation of future voluntary contribution
取消未來自願性供款

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PART VI – CHANGE OF MANDATORY CONTRIBUTION DETAILS 第六部份 – 更改強制性供款詳情:

❑ **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 ______________________ [date: 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 ________ 年 ________ 月 ________ 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 條所指明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 ______________________ [date: dd/mm/yyyy]

本人欲於 ________ 年 ________ 月 ________ 日起恢復所有供款

PART VII – DECLARATION 第七部份 – 聲明

- I confirm that the information provided by me to the Trustee in this form is true and correct, and hereby instruct the Trustee to amend the records accordingly. I agree to indemnify and keep the Trustee indemnified against any and all losses, costs, expenses, actions, proceedings suffered by the Trustee as a result of any inaccuracy of the information provided. 本人確認，本人在此表格上提供予受託人之資料正確無誤，並謹此要求受託人在記錄中作出相應之修改。倘若本人所填寫之資料錯誤，而導致受託人蒙受任何損失、支出、或須要進行任何行動或訴訟，本人同意作出有關賠償予受託人。
- I hereby declared, understood and agreed that all information supplied on this form together with any alterations can be used or transferred by the Trustee in the same manner as those being supplied under the previous Member Enrolment Form or any other data collection forms. 本人聲明、明白及同意受託人可以遵照以往之成員參加表格所列明的處理方式，使用或轉移本表格內提供之所有資料及任何更改過的資料。

____

Signature of Member (It must be the same as the record kept by the administrator)
成員簽署(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)

____

Contact Number 聯繫電話

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。

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Personal Information Collection Statement

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"), Principal Investment & Retirement Services Limited ("the promoter") (collectively, "the Companies") 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 Scheme Series 800 ("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.

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) 2827 1233.

個人資料收集說明書

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。閣下提供的資料及其他個人資料僅供信安信託(亞洲)有限公司(「受託人及管理人」)、美國信安保險有限公司(「保薦人」)及信安投資及退休金服務有限公司（「推銷商」）（統稱「公司」）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計劃800系列(「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。

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）2827 1233與本公司聯絡。