

**To 致: HSBC Provident Fund Trustee (Hong Kong) Limited**  
c/o The Hongkong and Shanghai Banking Corporation Limited 香港上海滙豐銀行有限公司  
PO Box 73770 Kowloon Central Post Office 九龍中央郵政信箱73770號  
or place to the MPF drop-in box at designated Hang Seng Bank branches  
或投放於指定恒生銀行分行的強積金寄存辦理箱  
Hang Seng MPF Employer Direct 恒生強積金僱主專線: 2288 6822  
Hang Seng MPF Service Hotline 恒生強積金服務熱線: 2213 2213



HAKE

## CUSTOMER INFORMATION FORM – PERSONAL CUSTOMER

### 客戶資料表格 – 個人客戶

(Applicable to Hang Seng Mandatory Provident Fund Scheme 適用於恒生強制性公積金計劃)

Please kindly provide us the below information and return the signed original of this form to the Administrator – The Hongkong and Shanghai Banking Corporation Limited, within 14 days after you received this letter. If any of the below sections leave blank, it means there is no change. 請提供以下資料，並於收到此通知14日內，將此填妥及已簽署之表格正本交回行政管理人 – 香港上海滙豐銀行有限公司。如沒有填寫下列任何部分，即代表沒有任何更改。

Note 注意:

- Please complete in CAPITAL and BLOCK LETTERS and tick ✓ the appropriate box(es). 請用大楷及正楷填寫，並於適當的方格內加上[✓]號。
- If you wish to update your personal information for your MPF account(s), please separately submit "Personal Details Change Form (HA91)", which is available at [hangseng.com/empf](http://hangseng.com/empf) 如要更新強積金賬戶之個人資料，請另遞交“更改個人資料表格(HA91)”。表格可在恒生網頁 [hangseng.com/empf](http://hangseng.com/empf) 下載。
- Certified true copies should be certified by any of the following personnel 提交認證副本可經由下列人士核證:
  - A certified public accountant/lawyer/banker/notary public acceptable to entities of HSBC Group; or 任何滙豐集團成員認可的執業會計師/律師/往來銀行/公證人; 或
  - A member of Hong Kong Institute of Chartered Secretaries (HKICS). 任何香港特許秘書公會會員。
- The information provided will be used in accordance with the relevant MPF Ordinance and/or its Regulations and the same manner as mentioned in the "Personal Information Collection Statement for Hang Seng Mandatory Provident Fund" ("PICS"). The PICS can be obtained through Hang Seng MPF website [hangseng.com/empf](http://hangseng.com/empf) or MPF hotline 2288 6822 (Employer) or 2213 2213 (Member). By signing this form, your present choice of receiving direct marketing information will remain unchanged. If you wish to update the use of your personal data for direct marketing purpose as stated in the PICS from the Hang Seng MPF scheme, you may exercise your right by notifying us. 所有已提供的資料將按照有關強積金條例及/或其規例及《恒生強積金的收集個人資料聲明》(聲明)處理。該聲明可透過以下恒生強積金網站 [hangseng.com/empf](http://hangseng.com/empf) 或強積金熱線2288 6822(僱主)或2213 2213(成員)索取。在簽署本表格後，你現時關於接收直接促銷資訊的選擇將維持不變。如你希望更新在恒生強積金計劃聲明中使用你的個人資料作直接促銷的用途，你可通知我們行使你的選擇權。

### A. Personal information 個人資料

1. Member's name 成員姓名 (same as that shown on your HKID Card/Passport 與身分證文件相同)	
2. Other name (in English) (if any) 別名(英文)(如有)  Surname 姓氏 _____ Given name 名字 _____	3. Previous name 過往名稱  Surname 姓氏 _____ Given name 名字 _____
4. HKID/Passport no.* 香港身分證/護照號碼*	5. Employer ID 僱主編號
6. Date of birth 出生日期 Year 年 _____ Month 月 _____ Day 日 _____ If your HKID card only contains the year and you have no other form of identity to prove the exact date of birth (e.g. birth certificate, passport), you should use 31 December as the day and month. Likewise, if your HKID card contains the year and month but not the day, you should use the last day of the month shown. If you leave the day and/or month blank, your date of birth will be regarded as the last day of that month or 31 December. 如你的香港身分證上只有出生年份，而你沒有其他形式的證件可證明你的實際出生日期(例如出生證明書或護照)，便應以12月31日作為出生日期。同樣地，如你的香港身分證上只有出生年份和月份而並沒註明有關日子，便應以有關月份的最後一天作為出生日期。請注意，若留空日子及/或月份，你的出生日期則被視為該月的最後一天或12月31日。	

\* Please provide the **certified true copy** of your HKID card/Passport, if it has not been provided previously or information has been changed. 若以往未曾提供你的香港身分證/護照證明文件予我們或資料已變更，請提供有關的證明文件之**認證副本**。

### B. Personal details of MPF account holder 強積金賬戶持有人資料

1. Nationality (Country/Region) 1 國籍(國家/地區) 1: _____ Multiple Nationality (Country/Region) 多重國籍(國家/地區) <input type="checkbox"/> Yes <input type="checkbox"/> No 否 Nationality (Country/Region) 2 國籍(國家/地區) 2 (if any 如有): _____ Nationality (Country/Region) 3 國籍(國家/地區) 3 (if any 如有): _____		2. Place of birth 出生地區	3. Jurisdiction of Tax Residence 稅務管轄區
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4. Residential address (The main address the majority of the time is spent or resided) (in English)  
住宅地址(大部分時間居住在這個主要地址)(英文)

- **PO Box address is not accepted 恕不接受郵政信箱**
- **Correspondence will be sent to this address 有關通訊將寄往此地址**

Effective date for residential address 住宅地址生效日期 | \_\_\_\_\_ | \_\_\_\_\_  
Year 年 Month 月

| \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_  
Room/Flat 室 Floor 樓 Block 座 Name of building 大廈名稱

| \_\_\_\_\_ | \_\_\_\_\_  
Name of estate 屋邨名稱 Number and name of street/road 門牌號碼及街道名稱

| \_\_\_\_\_ |  HK 香港  KLN 九龍  NT 新界  Others 其他 | \_\_\_\_\_ | \_\_\_\_\_  
District/Postal code 地區/郵政編號 City 城市 Country/Region 國家/地區

5. Previous residential address 前住址 (Please continue on a separate sheet and attach for submission if space provided is not sufficient. 如表格不敷應用，請於另紙作出補充並一併遞交。)

Not applicable 不適用

Previous residential address 前住址 (if reside at current residential address less than 1 year 如居於現址少於一年)

| \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_  
Room/Flat 室 Floor 樓 Block 座 Name of building 大廈名稱

| \_\_\_\_\_ | \_\_\_\_\_  
Name of estate 屋邨名稱 Number and name of street/road 門牌號碼及街道名稱

| \_\_\_\_\_ |  HK 香港  KLN 九龍  NT 新界  Others 其他 | \_\_\_\_\_ | \_\_\_\_\_  
District/Postal code 地區/郵政編號 City 城市 Country/Region 國家/地區

6. Correspondence address (in English) 通信地址 (英文)

Same as above residential address 與上述住宅地址相同

| \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_  
Room/Flat 室 Floor 樓 Block 座 Name of building 大廈名稱

| \_\_\_\_\_ | \_\_\_\_\_  
Name of estate 屋邨名稱 Number and name of street/road 門牌號碼及街道名稱

| \_\_\_\_\_ |  HK 香港  KLN 九龍  NT 新界  Others 其他 | \_\_\_\_\_ | \_\_\_\_\_  
District/Postal code 地區/郵政編號 City 城市 Country/Region 國家/地區

7. Telephone no. 聯絡電話  
(Please provide at least one telephone no. with its country/region. 請最少提供一個聯絡電話及其所屬國家/地區。)

Home 住宅  
 Hong Kong 香港  China 中國86-  Other country/region name 其他國家/地區 \_\_\_\_\_  
 Telephone no. 聯絡電話 \_\_\_\_\_

Work 工作  
 Hong Kong 香港  China 中國86-  Other country/region name 其他國家/地區 \_\_\_\_\_  
 Telephone no. 聯絡電話 \_\_\_\_\_

Mobile 手提電話  
 Hong Kong 香港  China 中國86-  Other country/region name 其他國家/地區 \_\_\_\_\_  
 Telephone no. 聯絡電話 \_\_\_\_\_

8. Employment status 僱傭狀況

Employed 受僱

Name of employer 僱主名稱: \_\_\_\_\_

Address of employer 僱主地址 (city and country/region 城市和國家/地區): \_\_\_\_\_

Occupation 職業: \_\_\_\_\_

In position of control of the corporation 為該公司/機構的管理層

Yes 是

No 否

Business Owner 業務擁有人

Self-employed 自僱

(For business owner or self-employed 適用於業務擁有人/自僱)

Name of company 公司名稱: \_\_\_\_\_

Business address 營業地址: \_\_\_\_\_

Job title 工作職位: \_\_\_\_\_

Retired 退休

For retiree, please provide your last employment information before retirement. 退休人士請提供退休前之職業資料。

Name of employer 僱主名稱: \_\_\_\_\_

Address of employer 僱主地址 (city and country/region 城市和國家/地區): \_\_\_\_\_

Occupation 職業: \_\_\_\_\_

Job title 工作職位: \_\_\_\_\_

Not currently employed 現時並未受僱

Housewife 家庭主婦

Others 其他 (please specify 請註明: \_\_\_\_\_)

9. Nature of business 業務性質 (for retired person, please provide your last employment information before retirement 退休人士請提供退休前之職業資料)

Agriculture/Livestock specialties 農業/家畜業

Construction 建築

Business services 商用服務

Finance/Insurance 金融/保險

Catering 餐飲業

Freight transport/Cargo/Couriers 貨運/航運/速遞

Communication 通訊

Import/Export traders 出入口貿易

Education 教育

Jewellery/Precious metals/Art dealers 珠寶/貴金屬/藝術品經銷商

Hotel/Boarding houses 酒店/旅館

Pharmaceutical industry 藥業

Personal/Household services 個人/家庭服務

Real estate 地產

Others 其他 (please specify 請註明: \_\_\_\_\_)

Sales/Rental of vehicles & equipment 車輛及相關設備銷售/租借

Textile business 紡織業

10. Source of fund 資金來源

Earning from work 工作薪金

Personal savings 個人儲蓄

Inheritance 遺產承繼

Sale of an asset 出售資產 (e.g. property 例如物業)

Investment return/Investment matured 投資回報/投資到期

Others 其他 (please specify 請註明: \_\_\_\_\_)

11. Annual income (HKD) 每年收入(港幣) (including bonus, commissions, etc. 實際收入包括獎金、佣金等)

HKD 港幣 \_\_\_\_\_ 元

12. Initial source of wealth 最初的財富來源 (select all that apply 請選擇所有適用的項目) (Please provide supporting document(s) if it has not been provided before. 如以往未曾提供, 請提供有關文件。)

Business income and profit 營業收入及利潤

Personal savings/Investments 個人儲蓄/投資

Investment by ultimate beneficial owner/partner 實益擁有人/合夥人的投資

Inheritance 繼承財產

Sale of property/asset 出售物業/資產

Intra-group financing 集團內部融資

Others 其他 (please specify 請註明: \_\_\_\_\_)

**C. On-going source of wealth 持續的財富來源 (select all that apply 請選擇所有適用的項目) (please provide supporting document 請提供有關文件)**

- Business income and profit 營業收入及利潤
- Personal savings/Investments 個人儲蓄／投資
- Investment by ultimate beneficial owner/partner 實益擁有人／合夥人的投資
- Inheritance 繼承財產
- Sale of property/asset 出售物業／資產
- Intra-group financing 集團內部融資
- Others 其他 (please specify 請註明) : \_\_\_\_\_

**D. Purpose of the MPF account 強積金賬戶的目的 (only applicable to Additional Voluntary Contributions/Flexi-Contributions 只適用於額外自願性供款／靈活供款)**

- Savings 儲蓄
- Others 其他 (please specify 請註明) : \_\_\_\_\_
- Investment 投資

**E. Anticipated level of account activity 預期的賬戶活動水平 (only applicable to Additional Voluntary Contributions/Flexi-Contributions 只適用於額外自願性供款／靈活供款)**

1. Expected account activities in the next 12 months 預期未來12個月的賬戶安排：

a. Any funds transfer in from other scheme 由其他計劃轉入資金

- Yes 是 (please provide the following information 請提供以下資料)

Expected amount 預期金額 : \_\_\_\_\_

No. of transactions 交易次數 : \_\_\_\_\_

- No 否

b. Any withdrawal of Voluntary Contributions/Flexi-Contributions 自願性供款／靈活供款提取

- Yes 是 (please provide the following information 請提供以下資料)

Total withdrawal amount 提取總額 : \_\_\_\_\_

Frequency of withdrawal 提取次數 : \_\_\_\_\_

- No 否

c. Any new Additional Voluntary Contributions/Flexi-Contributions 增加額外自願性供款／靈活供款

- Yes 是 (please provide the following information 請提供以下資料)

New contribution amount 新供款金額 : \_\_\_\_\_

New contribution frequency 新供款次數 : \_\_\_\_\_

- No 否

2. Any third parties contributions over HKD78,000 per month to your Hang Seng MPF account(s) 第三供款者提供每月多於港幣78,000元予你的恒生強積金賬戶

- No 否

- Yes, please list out information of your contributor in part (a) (If your contributor is a corporate entity, please complete part (b)):  
是，請在(a)項列出該資助人士的資料(如該資助人士屬於法人團體，請填寫(b)項)：

(a) Surname (in English) 姓(英文姓氏) : \_\_\_\_\_

Given name (in English) 名(英文姓名) : \_\_\_\_\_

Previous name 過往名稱 : \_\_\_\_\_

Date of birth 出生日期 (DD/MM/YYYY) : \_\_\_\_\_

Does the contributor have multiple nationalities (country/region)? 資助人士是否持有 多重國籍(國家／地區)?  Yes 是  No 否

Nationality (Country/Region) 1 國籍(國家／地區) 1 : \_\_\_\_\_

Nationality (Country/Region) 2 國籍(國家／地區) 2 (if any 如有) : \_\_\_\_\_

Residential address 住宅地址 (The main address the majority of the time is spent or resided 大部分時間居住在這個主要地址)  
(Please complete in English 請以英文填寫) : \_\_\_\_\_

(b) Full name of company 公司全名 : \_\_\_\_\_

Trading as name(s) 營業名稱 : \_\_\_\_\_

Country/Region of incorporation/registration 註冊／登記國家／地區 : \_\_\_\_\_

Registered office address in country/region of incorporation 註冊國家／地區的註冊辦事處地址 : \_\_\_\_\_

Principal place of business (if different to registered address) 主要業務所在地 (如與註冊辦事處地址不同) : \_\_\_\_\_

Listing on stock exchange 上市公司 : \_\_\_\_\_

Yes 是 (please specify the name of stock exchange 請註明交易所名稱) : \_\_\_\_\_

- No 否

## F. Declaration and authorisation 聲明及授權書

By signing this form, I declare that 在簽署本表格後，本人聲明：

- (a) the information given in this form/and its attachment is/are correct and complete. 本表格及附件所提供的資料為正確及完整。
- (b) I have read and understood the full details of this form (including the Notes on this form) and agree to abide by the rules stated herein. 本人已細閱及明白此表格內的所有內容(包括此表格上的注意部分)，並同意遵守此述的規則。

**X**

Signature of MPF Account Holder 強積金賬戶持有人簽署

Date 日期

(This signature must be the same as your previous specimen submitted to us. Otherwise, this form may not be processed. 此簽署須與你之前遞交予我們的式樣相同，否則本表格可能不獲處理。)