

# Claim form for payment of MPF accrued benefits (benefits) on grounds of permanent departure from Hong Kong/total incapacity/terminal illness/small balance/death (Sample)

## 基於永久性地離開香港／完全喪失行為能力／罹患末期疾病／小額結餘／死亡的理由而申索強積金累算權益(權益)的表格(樣本)

**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 或  
 Place into the MPF drop-in box at designated HSBC branches  
 投放於指定滙豐分行的強積金寄存辦理箱  
 HSBC MPF Employer Hotline 滙豐強積金僱主熱線: 2583 8033  
 HSBC MPF Member Hotline 滙豐強積金成員熱線: 3128 0128



### CLAIM FORM FOR PAYMENT OF MPF ACCRUED BENEFITS (BENEFITS) ON GROUNDS OF PERMANENT DEPARTURE FROM HONG KONG/TOTAL INCAPACITY/ TERMINAL ILLNESS/SMALL BALANCE/DEATH [FORM MPF(S) – W(O)]

#### 基於永久性地離開香港／完全喪失行為能力／罹患末期疾病／小額結餘／ 死亡的理由而申索強積金累算權益(權益)的表格 [表格 MPF(S) – W(O)]

**Note 注意:**

- Please complete in CAPITAL and BLOCK LETTERS and tick ✓ the appropriate boxes. 請用大格及正格填寫，並於適當的方格內加上 [✓] 號。
- This Form is to be completed by any person who wishes to claim for payment of benefits from an MPF registered scheme (scheme) on the grounds of permanent departure from Hong Kong, total incapacity, terminal illness, small balance or death. For a claim for payment of benefits on the grounds of attaining the retirement age of 65 or early retirement, please use "Claim Form for Payment of MPF Accrued Benefits (Benefits) on Grounds of Attaining the Retirement Age of 65 or Early Retirement [Form MPF(S) – W(O)]" (INPR). 本表格僅供擬基於永久性地離開香港、完全喪失行為能力、罹患末期疾病、小額結餘或死亡的理由提出申索，要求從一個強積金註冊計劃(計劃)提取權益的人士填寫。若基於已達到65歲退休年齡或提早退休的理由申索權益，請填寫「基於已達到65歲退休年齡或提早退休的理由而申索強積金累算權益(權益)的表格 [表格 MPF(S) – W(O)]」(INPR)。
- If the claimant/scheme member wishes to withdraw benefits from more than one scheme, please fill in a separate form for each scheme. 如申索人/計劃成員擬從多於一個計劃提取權益，須就每個計劃填寫一份表格。
- Please submit the completed form and the required supporting documents to the trustee of the scheme concerned for processing the claim. If any information provided is incorrect or incomplete, the relevant trustee may not be able to process your request. 請把填妥的表格及所需證明文件交予有關計劃的受託人，以便處理任何資料。若提供的任何資料不正確或不完整，有關受託人可能無法處理你的申請。
- Please read the explanatory notes carefully before completing this Form. 填寫本表格前，請先細讀註釋。
- The personal data to be supplied in support of this claim for payment of benefits are to be used for processing your claim. The personal data you supply may, for such purpose, be transferred to the relevant service provider(s) and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority (the Authority). 就此項申索權益申請提供的個人資料，將用作處理你的申索。你提供的個人資料可能會為該目的而轉交相關服務提供者及政府或規管機構，包括強制性公積金計劃管理局(管理局)。受託人須受有關計劃的管規規則所規限。詳情請查閱有關計劃的契約文件，而契約文件可於有關計劃受託人的網站閱覽。詳情請向有關受託人查詢。
- Withdrawal of benefits derived from voluntary contributions paid pursuant to section 11 of the Mandatory Provident Fund Schemes Ordinance (Cap 485) (the Ordinance) is subject to the governing rules of the scheme concerned. Please check the information from the offering document of the scheme concerned, which can be found on the website of the trustee of the scheme concerned. 就依據《條例》第11條存入的可扣除自願性供款所產生的權益而言，提取權益須受與強制性供款相同的提取規定所規限(惟根據第11A(3)條，若干與抵銷債務或長期服務有關，以及與保障債權人及其他人士的權益有關的條文並不適用)。
- Withdrawal of benefits derived from tax deductible voluntary contributions paid pursuant to section 11A of the Ordinance is subject to the same withdrawal requirements as for mandatory contributions (except that under section 11A(3), certain provisions relating to offsetting of severance or long service payments, and protection of benefits from creditors and others, do not apply). 就依據《條例》第11A條存入的可扣除自願性供款所產生的權益而言，提取權益須受與強制性供款相同的提取規定所規限(惟根據第11A(3)條，若干與抵銷債務或長期服務有關，以及與保障債權人及其他人士的權益有關的條文並不適用)。
- Please contact the relevant trustee for enquiries about account details and information on specific schemes or funds. 如欲查詢賬戶詳情及個別計劃或基金的資料，請聯絡有關受託人。
- For general enquiries regarding a claim for payment of benefits, please contact the relevant trustee or the Authority (email: mpfa@mpfa.org.hk or hotline: 2918 0102). 有關申索權益的一般查詢，請聯絡有關受託人或管理局(電話地址: mpfa@mpfa.org.hk 或熱線號碼: 2918 0102)。
- Please provide a certified true copy of your HKID card, if this was not previously provided or if there has been any change of information contained in your HKID card. If you are NOT a holder of a HKID card, please provide a certified true copy of your passport. 若以往未曾提供或資料已變更，請提供你的香港身分證之認證副本。如你非持有有效的香港身分證，請提供你的護照之認證副本。
- 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 any other member of the public acceptable to the relevant trustee; 或
  - A member of Hong Kong Institute of Chartered Secretaries (HKICS); or any other member of the public acceptable to the relevant trustee; 或
  - A MPF specialist at HSBC designated branches - You may bring along your HKID card/passport to any one of HSBC designated branches for verification purpose. For the information about the HSBC designated branches, please visit www.hsbc.com.hk/mpf. 指定滙豐分行強積金職員 - 你可攜同你的香港身分證/護照親臨任何一間指定滙豐分行，以便我們核實你的身分。查詢指定滙豐分行詳情，請瀏覽 www.hsbc.com.hk/mpf。
- "Registered Scheme" means a retirement benefits scheme registered under section 21 or 21A of the "MPF Ordinance". [註冊計劃]指已根據《強積金條例》第21條或第21A條註冊的退休福利計劃。
- For a scheme member who has ceased employment, wishes to claim the benefits from the scheme member's MPF contribution account on the grounds of permanent departure from Hong Kong, total incapacity or small balance by the claimant/scheme member, the employer's written notification of the employee's cessation of employment to the trustee is required. If the employer fails to do so, the claim processing on all MPF account(s) stated on the form may possibly be delayed until the administrator of HSBC MPF scheme receives the termination notification or relevant documents. 若已離職的計劃成員以基於永久性地離開香港、完全喪失行為能力或小額結餘為由，並打算由申索人/計劃成員提取有關之強積金供款賬戶中的權益，有關之僱主必須向受託人以書面遞交該僱員的離職通知書。倘若僱主未能遞交，有關表上所列明的強積金賬戶之申索將可能由管理局處理，直至滙豐強積金計劃行政人員收到書面通知(不論接納與否)或相關文件。
- For a scheme member who is still under employment, wishes to claim the benefits from the scheme member's MPF contribution account on the grounds of permanent departure from Hong Kong by the claimant/scheme member, a written explanation about the reason for claiming the benefits from the MPF contribution account during employment is required. If the claimant/scheme member fails to do so, the claim processing on all MPF account(s) stated on the form may possibly be delayed until the administrator of HSBC MPF scheme receives the written explanation (wherever is applicable) or relevant documents. 若仍在僱傭的計劃成員以基於永久性地離開香港為由，並打算由申索人/計劃成員提取有關之強積金供款賬戶中的權益，須遞交書面解釋(仍然受僱的情況下)提取有關之強積金供款賬戶中的權益的理由。倘若申索人/計劃成員未能遞交，有關表上所列明的強積金賬戶之申索將可能由管理局處理，直至滙豐強積金計劃行政人員收到書面解釋(不論接納與否)或相關文件。
- Please note that if any of your change of investment instruction is scheduled on any day that the claim for payment of benefits of the MPF account(s) as stated in this Form is to be processed, your change of investment instruction will be postponed or will not be processed if your MPF account(s) will be terminated after the claim for payment of benefits is completed. In addition, the information of your terminated MPF account(s) will not be shown in HSBC website www.hsbc.com.hk/mpf and HSBC Mobile Banking app. 請注意，如你的更改投資指示的執行日期為本表格所述強積金賬戶的權益申索的執行日，你的更改投資指示將會順延或若你的強積金賬戶於完成申索權益後終止，你的更改投資指示將不獲處理。此外，已終止的強積金賬戶資料將不會顯示在滙豐的網址 www.hsbc.com.hk/mpf 和滙豐流動理財應用程序。
- If there is any new contribution or transfer in amount received under your HSBC MPF account, your request for claim would be processed after such new contribution or transfer in amount has completed the subscription investment. 若你的滙豐強積金賬戶收到新的供款或轉移金額，你的申索要求將會待有關供款或轉移金額完成認購投資後才獲處理。
- (Applicable to Member who opts-in for MPF e-Statement / e-Advice 適用於強積金電子結單 / 電子通知書的成員)  
 Please be reminded to save/print all previously issued MPF e-Statement / e-Advice, where applicable, of your to-be-closed MPF account for record purpose. The MPF e-Statement / e-Advice will not be available via HSBC Online banking after the relevant MPF account is closed. 請在你的強積金賬戶終止前列印或儲存該賬戶的強積金電子結單 / 電子通知書(如適用)作往後的參考或備用。相關強積金賬戶一經終止，有關的強積金電子結單 / 電子通知書將無法透過滙豐網上理財使用。
- \* delete whichever is not applicable 請刪去不適用者

**Reminder 提示:**

- Withdrawal of benefits out of a guaranteed fund may result in some or all of the guarantee conditions not being satisfied; thus affecting your entitlement to the guarantee. Please check the offering document of the scheme or consult the relevant trustee for details. 若從保證基金提取權益，可能導致計劃成員不符合部分或所有保證條件，以致影響其享有保證的資格。詳情請查閱計劃的契約文件或向有關受託人查詢。
- The price of fund units may change due to market fluctuations and may go down as well as up. The price of fund units on the date when you submit a claim form to the trustee may be different from that on the date when the fund units are redeemed. 基金單位價格會因市場波動而出現變化，單位價格可跌亦可升。你向受託人提交申索表格當日的基金單位價格，或會與贖回基金單位當日的價格有所不同。
- If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the default investment strategy (DIS) of the scheme, you should be aware that the de-risking mechanism of the DIS starts at the age of 50. If the annual de-risking of your investments in the DIS and your claim for payment of benefits take place at around the same time, the trustee of the scheme shall sequence the de-risking and the claim in accordance with its procedures and in compliance with the Ordinance. Please consult the trustee of the scheme if you wish to know the details of how it will handle these transactions. 如你已年滿或快將年滿50歲，而現時你的權益是按計劃的預設投資策略投資，請留意預設投資策略的降低投資風險機制，會由計劃成員年滿50歲開始運作。如計劃的受託人在預設投資策略下按年降低你的投資風險的時點，與從你你的申索權益申請的時點相近，該計劃的受託人將根據其運作程序及在符合《條例》規定的情況下，訂定處理降低風險及申索權益的次序。如欲瞭解計劃受託人如何處理該等交易，請向受託人查詢詳情。
- Under the DIS, for a deceased Member, de-risking will cease once the trustee has received proof of the death of the Member to the trustee's satisfaction. If de-risking has already been taken place between the death of the Member and the time at which the trustee received the satisfactory proof of such death, such de-risking will not be undone, although no further de-risking will take place in respect of the deceased Member. 根據預設投資策略，若成員已離世，除非受託人收到所需的死亡證明文件，否則降低風險將會繼續。如降低風險於成員離世及受託人收到所需的死亡證明文件期間發生及完成，此降低風險不會還原，雖然降低風險可因應成員的離世而停止。

Note of the DIS.  
 「預設投資策略」的事項。

SECTION I – DETAILS OF THE CLAIMANT <sup>Note 1</sup> / SCHEME MEMBER 第 I 部 – 申索人<sup>註1</sup> / 計劃成員資料

(1) Claimant details 申索人資料

(i) Full Name in English <sup>Note 2*</sup> 英文全名 <sup>註2*</sup> (same as that shown on your HKID card/Passport 與香港身分證/護照上的姓名相同)
CHAN CHI KEUNG Surname 姓氏 Given name 名字
(ii) Identification number 身分證文件號碼
<input checked="" type="checkbox"/> HKID Card No. 香港身分證號碼 A234567 ( 8 ) <input type="checkbox"/> Passport No. 護照號碼 (ONLY for person without HKID Card 本欄僅供沒有香港身分證的人士填寫)
(iii) Date of birth* 出生日期* (only applicable for a claim for payment of benefits on the grounds of death 只適用於基於死亡的理由提出申索權益)
1980 01 11 Year 年 Month 月 Day 日
(iv) Correspondence address <sup>1</sup> 通訊地址 <sup>1</sup>
A 1 A SUN BUILDING Room/Flat 室 Floor 樓 Block 座 Name of building 大廈名稱 MOON ESTATE 8 SUN STREET Name of estate 屋邨名稱 Number and name of street/road 門牌號碼及街道名稱
District/Postal code 地區/郵政編號 <input checked="" type="checkbox"/> HK 香港 <input type="checkbox"/> KLN 九龍 <input type="checkbox"/> NT 新界 <input type="checkbox"/> Others 其他 City* 城市* Country/Region* 國家/地區*
Country/Region code 國家/區域編號 Area code 地區號碼 Phone no. 電話號碼
(v) Day time contact no. <sup>1,2</sup> 日間聯絡電話 <sup>1,2</sup> 2123 4567 (vi) Mobile phone no. <sup>1,2</sup> 流動電話號碼 <sup>1,2</sup> 9876 5432 (vii) Email address <sup>3</sup> 電郵地址 <sup>3</sup> ABC@ABC.COM

The full name must be the same as that shown on the HKID card/Passport. 全名必須與香港身分證/護照上的姓名相同。

Passport number should be given only if you do not possess HKID card. 在沒有香港身分證情況下方可填寫護照號碼。

Please fill in the personal information of the claimant. 請填寫申索人的個人資料。

\* The information is required to be reported by the reporting financial institution to the Inland Revenue Department. 這些項目為申報金融/財務機構須向稅務局申報的資料。  
1 After verifying the signature provided in this claim form, the correspondence address, day time contact no., mobile phone no. and email address will be updated accordingly for the scheme member's other relevant MPF scheme accounts under HSBC MPF for future correspondence. The withdrawal statement and cheque (if any) related to this claim request will be sent to this correspondence address after completion of this claim request. If you are also a user of the HSBC Online Banking and Mobile Banking services solely for your participation in the HSBC MPF scheme without having a bank account with HSBC ("MPF only"), please provide your correspondence address in English, mobile phone number, and email address in this form. Otherwise, your HSBC Online Banking and Mobile Banking services (MPF only) and request for regeneration of a Personal Identification Number (PIN) may be affected. 核實你在此申索表格所提供的簽署後，此通訊地址、日間聯絡電話、流動電話號碼及電郵地址將被更新於滙豐強積金下計劃成員的其他有關強積金計劃賬戶作為日後通訊。當此表格之申索完成處理後，有關提取現款及支票(如有)將會寄往此通訊地址。如你同時並僅參與滙豐強積金計劃而沒有滙豐銀行賬戶的滙豐網上理財及流動理財用戶，請在本表格提供你的英文通訊地址、流動電話號碼及電郵地址。否則你的滙豐網上理財及流動理財服務(僅限強積金)和重新發出密碼的要求可能會受到影響。  
2 If you are providing overseas contact details outside Hong Kong SAR, please also include the correct Country/Region Code and Area Code. However, for overseas mobile numbers, usually there is no need to add an Area Code and you may check with your telecommunications service provider for details. 如你所提供的是香港特別行政區以外的海外聯絡資料，請包括正確的國家/區域及地區編號。然而，海外手提電話號碼一般毋須加上地區編號。詳情請向你的電話服務供應商查詢。

(2) Scheme member details 計劃成員資料 (if different from the claimant 如與申索人不同)

(i) Full Name in English <sup>Note 2*</sup> 英文全名 <sup>註2*</sup> (same as that shown on your HKID card/passport 與香港身分證/護照上的姓名相同)
Surname 姓氏 Given name 名字
(ii) Identification number 身分證文件號碼
<input type="checkbox"/> HKID Card No. 香港身分證號碼 ( ) <input type="checkbox"/> Passport No. 護照號碼 (ONLY for scheme member without HKID Card 本欄僅供沒有香港身分證的計劃成員填寫)

Please fill in the scheme member details (if different from the claimant). 請填寫計劃成員資料(如與申索人不同)。

SECTION II – DETAILS OF THE CLAIM 第 II 部 – 申索資料

(1) Account Information 賬戶資料 (please ✓ the appropriate box 請在適當的方格內填上✓號)

(i) Name of Scheme 計劃名稱: HSBC MPF – SuperTrust Plus 滙豐強積金智選計劃
(ii) <input checked="" type="checkbox"/> All accounts under the Scheme 計劃內所有賬戶 <input type="checkbox"/> Selected account(s) under the Scheme 計劃內的指明賬戶 (please specify the scheme member account no. (i.e. Employer ID/Scheme ID) <sup>Note 3,11</sup> ) 請註明計劃成員賬戶號碼(即僱主編號/計劃編號) <sup>註3,11</sup>
(a) _____ (b) _____ (c) _____

Please fill in the account information. 請填寫賬戶資料。

**(2) Grounds for claiming benefits and the required documents** <sup>Note 4, 5</sup> 申索權益的理由及所需文件<sup>註4, 5</sup> (please ✓ the appropriate box 請在適當的方格內填上✓號)

Note 注意:

Apart from the required documents listed below, the administrator of HSBC MPF scheme may request you to provide further documents for your claim request for payment of benefits. 除下列所需文件外, 滙豐強積金計劃行政管理人可能會因應你的申索權益申請而進一步要求你提供額外文件。

**Permanent departure from Hong Kong 永久性離開香港**

Required documents 所需文件:

- a copy of the scheme member's HKID card for verification of the name and identity card number of the scheme member if the claimant does not wish to present the card in person for verification <sup>Note 6</sup> 計劃成員的香港身分證副本, 以供核對其姓名及身分證號碼(如不擬親身出示計劃成員的香港身分證供核對有關資料)<sup>註6</sup>;
- a copy of the documents/evidence that the scheme member is permitted to reside in a place other than Hong Kong (e.g. immigration visa/foreign passport) 准予計劃成員在香港以外某地方居住的文件/證明文件副本(例如移民簽證/外國護照);
- the original statutory declaration form on permanent departure (Form MPF(S)-W(SD2)) <sup>Note 5, 7</sup> 有關永久性離開香港的法定聲明表格(第MPF(S)-W(SD2)號表格)<sup>註5, 7</sup>正本;
- a copy of the Letter of Release issued by the Inland Revenue Department, if applicable; and 稅務局發出的同意釋款書副本(如適用); 及
- information on overseas settlement 海外定居資料:
  - (i) Place other than Hong Kong where the scheme member is permitted to reside 計劃成員在香港之外獲准居住的地方:  
\_\_\_\_\_
  - (ii) Address 地址: \_\_\_\_\_
  - (iii) Telephone No. 電話號碼: \_\_\_\_\_ (iv) Fax No. 傳真號碼: \_\_\_\_\_
  - (v) Email Address 電郵地址: \_\_\_\_\_
  - (vi) Departure reason(s) 離港原因:
    - Emigration 移民
    - Retirement 退休
    - Family reunion 家庭團聚
    - Long-term overseas employment 長期海外受聘
    - Marriage 結婚
    - Others (please specify) 其他(請註明): \_\_\_\_\_

**Total incapacity 完全喪失行為能力**

Required documents 所需文件:

- a copy of the scheme member's HKID card for verification of the name and identity card number of the scheme member if the claimant does not wish to present the card in person for verification <sup>Note 6</sup>; and 計劃成員的香港身分證副本, 以供核對其姓名及身分證號碼(如不擬親身出示計劃成員的香港身分證供核對有關資料)<sup>註6</sup>; 及
- a copy of the medical certificate certifying total incapacity (Form MPF(S)-W(M)) <sup>Note 8, 9</sup> 證明計劃成員完全喪失行為能力的醫學證明書(第MPF(S)-W(M)號表格)<sup>註8, 9</sup>副本

**Terminal illness** <sup>Note 10</sup> 罹患末期疾病<sup>註10</sup>

Required documents 所需文件:

- a copy of the scheme member's HKID card for verification of the name and identity card number of the scheme member if the claimant does not wish to present the card in person for verification <sup>Note 6</sup>; and 計劃成員的香港身分證副本, 以供核對其姓名及身分證號碼(如不擬親身出示計劃成員的香港身分證供核對有關資料)<sup>註6</sup>; 及
- a copy of the medical certificate certifying terminal illness dated not earlier than 12 months before the date on which the claim is lodged (Form MPF(S)-W(T)) <sup>Note 8</sup> 在提交申索日期之前的12個月內簽發的證明計劃成員罹患末期疾病的醫學證明書(第MPF(S)-W(T)號表格)<sup>註8</sup>副本
- Employer Consent Form for Employees Who Claim on The Grounds of Terminal Illness (Employee) (INGT) (For HSBC MPF scheme member who is during employment and wish to make a claim for the payment of voluntary contributions under contribution account) 僱主就僱員以罹患末期疾病為理由申索的同意書(僱員) (INGT) (如屬在職僱員及欲申索在供款賬戶下的自願性供款的滙豐強積金成員)

**Small balance 小額結餘**

Required documents 所需文件:

- a copy of the scheme member's HKID card for verification of the name and identity card number of the scheme member if the claimant does not wish to present the card in person for verification <sup>Note 6</sup>; and 計劃成員的香港身分證副本, 以供核對其姓名及身分證號碼(如不擬親身出示計劃成員的香港身分證供核對有關資料)<sup>註6</sup>; 及
- the original statutory declaration form on small balance (Form MPF(S)-W(SD3)) <sup>Note 5, 7</sup> 有關小額結餘的法定聲明表格(第MPF(S)-W(SD3)號表格)<sup>註5, 7</sup>正本

**Death 死亡**

Required documents 所需文件:

- a copy of the claimant's HKID card for verification of the name and identity card number of the claimant if the claimant does not wish to present the card in person for verification <sup>Note 6</sup>; and 申索人的香港身分證副本, 以供核對其姓名及身分證號碼(如不擬親身出示申索人的香港身分證供核對有關資料)<sup>註6</sup>; 及
- a copy of the 'Letter of Probate' or 'Letters of Administration' granted by the Probate Registry/a letter requesting withdrawal of the benefits issued by the Official Administrator if the claim is made by the Official Administrator; and 遺產承辦處發出的「遺囑認證書」或「遺產管理書」副本/(如申索是由遺產管理官提出)遺產管理官發出要求提取權益的信件; 及
- Claimant's Individual Tax Residency Self-Certification Form (CRS-I (HK)-MPF) 申索人的個人稅務居民自我證明表格 (CRS-I (HK)-MPF)

Please select the Grounds for claiming benefits and the required documents. 請選擇申索權益的理由及所需文件。

(3) Method of payment 付款方式 (please ✓ the appropriate box 請在適當的方格內填上✓號)

(The direct deposit service is only available for bank account with sole account holder. For verification purpose, please provide supporting document which shows bank account number and name of account holder, such as copy of bank statement, copy of bank ATM card or copy of bank reference letter etc. If the relevant supporting document is not provided, the administrator of HSBC MPF scheme is unable to proceed with direct deposit to your bank account and the method of payment will be changed to be by cheque without prior notice. 直接存入銀行賬戶服務只適用於你以個人名義獨立持有的銀行賬戶。請提供能顯示你銀行賬戶號碼及持有人名稱的文件作核實用途，例如銀行月結單副本、銀行提款卡副本或銀行信件副本等。如未能提供有關文件，滙豐強積金計劃行政管理人不能提供直接存入銀行賬戶服務，而付款方式將轉為以支票付款及不作另行通知。)

by depositing directly into a bank account under the sole name of claimant/scheme member only 直接存入只以申索人/計劃成員名義開立的銀行賬戶 (This option is applicable only to trustees who provide such services and there may be bank charges involved. If the claimant/scheme member chooses to have the benefits to be paid to his/her other local bank (except for HSBC in Hong Kong or Hang Seng Bank in Hong Kong) or overseas bank account directly, bank charges may apply by the claimant/scheme member's banking account. 這項選擇只適用於有提供此項服務的受託人，而銀行可能會因此收取費用。如申索人/計劃成員選擇將權益直接匯入其他本地銀行(香港滙豐或香港恒生銀行除外)或海外銀行賬戶，則該銀行可透過申索人/計劃成員的銀行賬戶收取銀行手續費。)

Name of bank account holder 銀行賬戶持有人姓名: **CHAN CHI KEUNG**

Name of bank 銀行名稱:

HSBC in Hong Kong 香港滙豐

Hang Seng Bank in Hong Kong 香港恒生銀行

Other local bank, please specify 其他本地銀行，請註明:

Overseas bank, please specify 海外銀行，請註明:

Bank account number 銀行賬戶號碼: **111-1-111111**

For overseas bank only 只適用於海外銀行:

(i) Address of bank 銀行地址:

(ii) Swift code Swift編號:

(iii) Other settlement information (if any) 其他結算資料(如有)

(e.g. 例如: IBAN)

(iv) Currency 貨幣:

by cheque 支票

Please select method of payment.  
請選擇付款方式。

SECTION III – DECLARATION & AUTHORISATION 第三部 – 聲明及授權書

Personal information collection statement 收集個人資料聲明

- Personal data provided by you from time to time may, to the extent not prohibited by applicable law, be used for one or more of the following purposes: (i) the administration and/or management of or in connection with the contributions or accrued benefits or MPF account in respect of the Participating Employers and/or Members under the HSBC MPF scheme and Hang Seng MPF scheme administered by the HSBC Group; (ii) improving and furthering the provision of MPF products and/or MPF services (including through customer research or surveys) by entities of the HSBC Group; (iii) matching for MPF related purpose with other personal data concerning the relevant Participating Employers and/or Members; (iv) compliance or in accordance with an order of a court or compliance or in accordance with a law or a requirement made under a law (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information) or compliance or in accordance with any guidelines, guidance or requests given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information. 你不時提供的個人資料，限於不在適用法律禁止之列，將可被用於以下一項或多項用途：(i) 由滙豐集團管理行政的滙豐強積金計劃及恒生強積金計劃下與參與僱主及/或成員的供款或累積權益或強積金戶口有關的行政事宜及/或管理；(ii) 改善及進一步提供由滙豐集團成員所提供的強積金產品及/或強積金服務(包括透過客戶研究或調查)；(iii) 為任何強積金相關的用途而核對相關參與僱主及/或成員的其他個人資料；(iv) 遵守或按照法庭命令或遵守或按照法律或根據法律訂立的規定(例如《稅務條例》及其條文，包括關於自動交換財務賬戶資料的條文)或遵守或按照任何稅務局所提供或發出的指引、指導或要求，包括關於自動交換財務賬戶資料的指引、指導或要求。
- Failure to provide your information may result in us being unable to process your application or perform the services you request. 如果你未能提供資料將可能導致我們未能處理你的申請或提供你所要求的服務。
- Personal data held by us relating to you will be kept confidential but, to the extent not prohibited by applicable law, such information may be provided by us or any of our service providers to the following parties for the purposes set out in paragraph 1: (i) any regulators or government authorities; (ii) any service provider, agent or contractor who provides administrative, telecommunications, computer, payment, data processing, matching, storage, customer research or survey or other services in connection with the operation of our MPF business; (iii) relevant Participating Employers; (iv) entities of the HSBC Group. Such information may be transferred to a place outside Hong Kong Special Administrative Region. 由我們持有關於你的個人資料將予保密，但限於不在適用法律禁止之列，我們或任何我們的服務供應商可能會將該等資料提供給以下各方作第1段所述的用途：(i) 任何監管機構或政府機關；(ii) 任何提供與營運我們的強積金業務有關的行政、電話、電腦、付賬、數據處理、核對、儲存、客戶研究或調查或其他服務的任何服務供應商、代理人或承包商；(iii) 相關的參與僱主；(iv) 滙豐集團成員。該等資料可能轉移至香港特別行政區以外的地方。
- You have the right to request access to and correction of your personal data held by us. Request should be addressed to: The Data Protection Officer, HSBC Provident Fund Trustee (Hong Kong) Limited, c/o The Hongkong and Shanghai Banking Corporation Limited, PO Box 73770, Kowloon Central Post Office. 你有權要求查閱及更改由我們持有的個人資料。如有需要，可致函九龍中央郵政信箱73770號(c/o 香港上海滙豐銀行有限公司)，向 HSBC Provident Fund Trustee (Hong Kong) Limited 資料保障主任提出要求。

**SECTION III – DECLARATION & AUTHORISATION (CONT'D) 第III部 – 聲明及授權書(續)**

**(1) Termination of MPF account with no residual balance (if applicable) 終止沒有剩餘款項的強積金賬戶(如適用)**

- I/we<sup>Note 1</sup> hereby authorise the trustee to terminate the relevant scheme member account(s) as referred to in Section III(1) upon 本人/我們<sup>註1</sup>謹此授權受託人在以下情況終止在第III(1)部所述的計劃成員賬戶：
- (i) withdrawal of the full amount of benefits with no residual balance in the said account(s) 該賬戶內的權益已被全數提取，並無剩餘款項；
  - (ii) (for employee contribution account only) termination of the employment in relation to the contribution account; and (只適用於僱員供款賬戶) 該供款賬戶所涉及的受僱已經終止；及
  - (iii) (for self-employed person contribution account only) cessation of the self-employment, with effect from \_\_\_\_\_ (DD/MM/YYYY). (只適用於自僱人士供款賬戶) 終止自僱，生效日期為 \_\_\_\_\_ (年/月/日)。

**(2) For claim for payment of benefits on grounds of total incapacity only 只適用於基於完全喪失行為能力的理由而要求支付權益的申索**

For the claim for payment of benefits on the grounds of total incapacity, I/we<sup>Note 1</sup> hereby declared that I/the scheme member<sup>1</sup> last performed the relevant kind of work as set out in the medical certificate (Form MPF(S)-W(M)) before becoming totally incapacitated or the "Certificate of an employee's permanent unfit for a particular type of work"<sup>Note 9</sup> and that contract of employment has been terminated. 本人/我們<sup>註1</sup>謹此就基於完全喪失行為能力的理由而要求支付權益的申索作出聲明，本人/計劃成員，在完全喪失行為能力前，最後是執行醫學證明書(第MPF(S)-W(M)號表格)或「證明僱員永久不適合擔任某類工作的證明書」<sup>註9</sup>所載有關類別的工作，而該僱傭合約已經終止。

**(3) Declaration 聲明**

I/we<sup>Note 1</sup> declare that to the best of my/our<sup>1</sup> knowledge and belief, the information given in this Form and its attachments is correct and complete.<sup>†</sup> 本人/我們<sup>註1</sup>聲明，盡本人/我們<sup>註1</sup>所知所信，本表格及隨附文件所提供的資料均屬正確無訛且並無缺漏。<sup>†</sup>

*Chan*

Signature of claimant(s) 申索人簽署

2023/11/30

Date 日期

<sup>†</sup>Warning 注意：Under section 43E of the Ordinance, a person who, in any document given to the Authority or an approved trustee, knowingly or recklessly makes a statement which is false or misleading in a material respect commits an offence and is liable to a maximum penalty of a HKD100,000 fine and one year's imprisonment on the first conviction and a HKD200,000 fine and two years' imprisonment on each subsequent conviction. A person who knowingly and wilfully makes a statutory declaration false in a material particular also commits an offence under section 36 of the Crimes Ordinance (Cap 200) and is liable on conviction to imprisonment for two years and to a fine. 根據《條例》第43E條，任何人在給予管理局或核准受託人的任何文件中，明知或罔顧後果地作出在要項上屬虛假或具誤導性的陳述，即屬犯罪。首次定罪者，最高可處罰款港幣100,000元及監禁一年；其後每次定罪，最高可處罰款港幣200,000元及監禁兩年。根據《刑事罪行條例》(第200章)第36條，任何人明知而故意在法定聲明中作出在要項上屬虛假的陳述，亦屬犯罪。一經定罪，可處監禁兩年及罰款。

For termination of MPF account with no residual balance. 適用於終止沒有剩餘款項的強積金賬戶。

For claim for payment of benefits on grounds of total incapacity only. 只適用於基於完全喪失行為能力的理由而要求支付權益的申索。

Please provide the signature of claimant(s). 請提供申索人簽署。

Please state the date. 請註明日期。

Before completing the INPO form, please read carefully the Explanatory Notes on Claim Form for Payment of MPF Accrued Benefits (Benefits) on Grounds of Permanent Departure from Hong Kong/Total Incapacity/Terminal Illness/Small Balance/Death.

填寫INPO表格前，請先小心閱讀基於永久性地離開香港／完全喪失行為能力／罹患末期疾病／小額結餘／死亡的理由而申索強積金累算權益(權益)的表格註釋。

**Explanatory Notes on  
Claim Form for Payment of MPF Accrued Benefits (Benefits) on Grounds of  
Permanent Departure from Hong Kong/Total Incapacity/  
Terminal Illness/Small Balance/Death (Form MPF(S) – W(O))**  
基於永久性地離開香港／完全喪失行為能力／罹患末期疾病／小額結餘／死亡的理由  
而申索強積金累算權益(權益)的表格(第MPF(S) – W(O)號表格)  
註釋

- (1) (i) For a claim made on the grounds of death, only personal representatives within the meaning of the Mandatory Provident Fund Schemes Ordinance can be the claimant to act on behalf of the deceased scheme member to claim for payment of the scheme member's benefits. This includes a personal representative within the meaning of the Probate and Administration Ordinance (Cap 10) and the Official Administrator who gets in and administers an estate of a deceased scheme member in a summary manner without a grant or other legal formality under section 15 of that Ordinance. If there is more than one personal representative and the personal representatives have not authorised one of the representatives to act on behalf of other representatives to lodge the claim, all the personal representatives should submit the Claim Form jointly. Please use an additional blank sheet to provide details of the claimants under Section I. Under such circumstances, this Form needs to be signed by all of the personal representatives. 基於死亡的理由而提出的權益申索，只可由《強制性公積金計劃條例》所界定的遺產代理人作為申索人，代表已故計劃成員提出。這些人包括由《遺囑認證及遺產管理條例》(第10章)所界定的遺產代理人及按該條例第15條，在無須任何授予書或其他法律手續的情況下，將已故計劃成員的遺產收集及以簡易方式管理的遺產管理官。假如遺產代理人超過一名，而該些遺產代理人並未授權其中一人作為申索代表，則申索表格須由所有遺產代理人聯名提交。請就第1部另紙詳載各申索人的資料。在這種情況下，本表格須由所有遺產代理人聯署。
- (ii) For a claim made on all other grounds of permanent departure from Hong Kong, total incapacity, terminal illness or small balance, either the scheme member or person(s) appointed as a committee of the estate of a mentally incapacitated person under the Mental Health Ordinance (Cap 136) (the committee of the estate) to act on behalf of the scheme member can be the claimant to lodge the claim for payment of benefits. If there is more than one person appointed by the court as the committee of the estate, those persons should apply and sign in the capacity as the committee of the estate in accordance with those terms of appointment and any other requirements contained in the relevant court order. Please use an additional blank sheet to provide details of the claimants under Section I. Under such circumstance, this Form needs to be signed by all of the persons appointed by the court as the committee of the estate, unless the Court authorises otherwise. 基於所有其他理由(即永久性地離開香港、完全喪失行為能力、罹患末期疾病或小額結餘)而要求支付權益的申索，可由計劃成員或根據《精神健康條例》(第136章)獲委任代表精神上無行為能力的計劃成員行事的產業受託監管人(產業受託監管人)作為申索人提出。如法庭委任超過一人為產業受託監管人，該等人士應按照委任條款及有關法庭命令所載的任何其他規定，以產業受託監管人的身分提出申請及在相關文件簽署。請就第1部另紙詳載各申索人的資料。在此情況下，除非法庭另有授權，否則本表格須由所有獲法庭委任為該計劃成員的產業受託監管人的人士簽署。
- (2) If a claimant/scheme member does **NOT** possess a HKID Card, please fill in the name as shown on the passport. 如申索人/計劃成員沒有香港身分證，請填上護照上的姓名。
- (3) Scheme member account number can be found 計劃成員賬戶號碼可循以下途徑查閱/查詢：
- (i) in the membership certificate, notice of acceptance, or notice of participation; or 查詢成員證明書、接納通知或參與通知；或
- (ii) in the annual benefit statement, or other statements provided by the trustee; or 查詢周年權益報表或受託人提供的其他報表；或
- (iii) through the member enquiry facilities available from the trustee. 受託人為成員提供的諮詢服務。
- If you are in doubt, please contact the trustee of the MPF registered scheme (scheme) concerned. 如有疑問，請聯絡有關強積金註冊計劃(計劃)的受託人。
- (4) In processing a claim for payment, the trustee of the scheme concerned may request the claimant to produce the original documents for checking purpose, if necessary. 如有需要，有關計劃的受託人在處理付款申索時可能會要求申索人提交文件的正本，以核對資料。
- (5) For a claim made by the committee of the estate on behalf of the scheme member, in addition to the required documents in respect of the scheme member, the following documents should be enclosed 由產業受託監管人代表計劃成員提出的申索，除須提供有關該計劃成員的所需文件外，亦應夾附以下文件：
- (i) a copy of the evidence of the status of the committee of the estate, i.e. the court order 產業受託監管人身分的證明文件副本，即法庭命令的副本；
- (ii) a copy of each claimant's HKID card for verification of the name and identity card number of the claimant if the claimant does not wish to present the card in person for verification<sup>Note 4</sup>; and 每名申索人的香港身分證副本，以供核對其姓名及身分證號碼(如不願親身出示申索人的香港身分證供核對有關資料)<sup>Note 5</sup>；及
- (iii) the original statutory declaration form made by the committee of the estate for a claim for payment of benefits (MPF(S) – W(SD4))<sup>Note 2</sup> (if applicable). Where such a statutory declaration has been made and enclosed with the claim, the statutory declaration form (MPF(S)-W(SD2) and MPF(S)-W(SD3)) for claims made on the grounds of permanent departure from Hong Kong and small balance respectively shall not be required. 產業受託監管人就申索權益所作的法定聲明表格(第MPF(S)-W(SD4)號表格)<sup>Note 2</sup>正本(如適用)。如使用該表格作出聲明並把該表格夾附於本申索，便無須提交基於永久性地離開香港及小額結餘的理由作出申索的法定聲明表格(即第MPF(S)-W(SD2)號表格及第MPF(S)-W(SD3)號表格)。

(Please tear off, please.)

- (6) For a claimant/scheme member who does NOT possess a HKID card, a copy of the passport (only pages with personal particulars and passport number) should be provided to the trustee concerned for verification of the name and passport number of the claimant/scheme member if the claimant/scheme member does not wish to present the passport in person for verification. 如申索人/計劃成員沒有香港身分證，而又不擬親身出示護照以供核對資料，則須提供護照副本(只須提供載有個人資料及護照號碼之頁)以供受託人核對申索人/計劃成員的姓名及護照號碼。
- (7) The statutory declaration must be a valid statutory declaration in the place where the declaration is made (e.g. in Hong Kong, the statutory declaration should be made before and signed by a Commissioner for Oaths (e.g. at a Public Enquiry Service Centre of the Home Affairs Department) or a Notary Public or a Justice of the Peace). A statutory declaration made in a place other than Hong Kong is also acceptable provided that it is made before and signed by a Notary Public or a person authorised under the law of that place to administer an oath or take a statutory declaration. 法定聲明必須是一份屬該聲明宣誓所在地有效的法定聲明(例如在香港，法定聲明須在監督員(例如在民政事務總署諮詢服務中心)或公證人或太平紳士面前作出，並由他們簽署)。在香港以外地方所作的法定聲明，只要是在公證人或獲該地方法律授權監督或監理法定聲明的人士面前作出，並由他們簽署，亦可予接受。
- (8) A medical certificate certifying total incapacity (Form MPF(S) – W(M)) or terminal illness (Form MPF(S) – W(T)) shall be signed by a medical practitioner who must be either - 證明計劃成員完全喪失行為能力的醫學證明書(第MPF(S)-W(M)號表格)或罹患末期疾病的醫學證明書(第MPF(S)-W(T)號表格)須由下述醫生簽署：
- (i) a registered medical practitioner who is registered under the Medical Registration Ordinance (Cap 161), i.e., 根據《醫生註冊條例》(第161章)註冊的註冊醫生，即：
    - (a) a person who is duly registered as a medical practitioner with the Medical Council of Hong Kong; or 在香港醫務委員會正式註冊為醫生的人；或
    - (b) a person who is deemed to be registered as a medical practitioner under the Medical Registration Ordinance (Cap 161) (i.e. persons who are exempted from registration); 獲視為根據《醫生註冊條例》(第161章)註冊成為醫生的人(即獲豁免無須註冊的人)；
- 或或
- (ii) a registered Chinese medicine practitioner, within the meaning assigned to it by section 2(1) of the Chinese Medicine Ordinance (Cap 549). 《中醫藥條例》(第549章)第2(1)條所界定的註冊中醫。
- (9) For a claim made on the grounds of total incapacity, the claimant shall ask a medical practitioner to fill in the Form MPF(S)-W(M) and attach it to the Form MPF(S) – W(O). 基於完全喪失行為能力的理由而提出的權益申索，申索人須請醫生填寫第MPF(S) – W(M)號表格並夾附於第MPF(S) – W(O)號表格。
- For a claimant who also claims long service payment on the grounds of permanent unfitness for his present job under the Employment Ordinance (Cap 57), the claimant may use the form "Certificate of an employee's permanent unfitness for a particular type of work" under that Ordinance to substitute for the Form MPF(S) – W(M) for the purpose of claiming payment of MPF benefits on the grounds of total incapacity. 申索人如按《僱傭條例》(第57章)的規定，以永久不適合擔任其現時工作為理由同時申索長期服務金，則可採用按該條例填寫的「證明僱員永久不適合擔任某類工作的證明書」，替代填寫第MPF(S) – W(M)號表格，以提出基於完全喪失行為能力的理由而支付強積金權益的申索。
- (10) For a claim made by a scheme member for payment of benefits from a contribution account on the grounds of terminal illness, the scheme member may continue his current employment or current self-employment after he has received the payment of benefits. In that case, future contributions made by the employer (both employer and employee portions) or by the self-employed person himself will continue to be made to the contribution account. If the scheme member wishes to withdraw the benefits derived from future contributions and transfer-in benefits (if any) in the contribution account again, he should lodge another claim for payment of benefits. 計劃成員如基於罹患末期疾病的理由而要求從供款賬戶提取權益，該計劃成員在獲支付權益後，可能繼續從事其現時的受僱或自僱工作。在此情況下，僱主日後作出的供款(包括僱主及僱員部分)或該自僱人士日後作出的供款，將繼續分配至該供款賬戶。計劃成員如欲再度從該供款賬戶提取由未來供款及轉入的權益(如有)所產生的權益，須另行提出權益的申索。
- (11) All the benefits derived from Flexi-Contributions will be paid. If you hold an independent Flexi-Contribution account, please specify the scheme ID beginning with '28'. 所有靈活供款的權益將會被支付。如你擁有一個獨立的靈活供款賬戶，請註明該以[28]為開首之計劃編號。