



Terms and conditions for HSBC MPF personal account consolidation – May - July 2024 Special MPF Mobile Consolidation Offer

1. The May - July 2024 Special MPF Mobile Consolidation Offer (**'May - July Special Mobile Offer'**) is provided by The Hongkong and Shanghai Banking Corporation Limited (**'HSBC'**).
2. All members are required to successfully transfer a minimum of HKD100,000 in aggregate (amount will be rounded up to the nearest integer) of their MPF accrued benefits from other MPF schemes i.e. non-HSBC and non-Hang Seng MPF schemes (**'Eligible MPF Benefits'**), to their HSBC MPF personal account (**'Eligible Account'**) through the HSBC HK Mobile Banking app (**'HSBC HK App'**) in order to enjoy the May - July Special Mobile Offer. Members who register through an HSBC MPF Specialist will not be eligible.
3. The following terms and conditions are applicable to the May - July Special Mobile Offer:
 - The promotion period of the May - July Special Mobile Offer is from 6 May 2024 to 31 July 2024 (both days inclusive) (**'Promotion Period'**).
 - The May - July Special Mobile Offer is only available to the following members (**'Eligible Members'**):
 - i. Members who do not hold an Eligible Account before the Promotion Period on 5 May 2024 (subject to HSBC's system record), and who successfully open an Eligible Account within the Promotion Period by submitting a duly completed Personal Account Holder Application Form through the HSBC HK App (**'New Mobile Consolidation Members'**); or
 - ii. Existing members who already hold an Eligible Account before the Promotion Period on 5 May 2024 (subject to HSBC's system record) (**'Existing Mobile Consolidation Members'**).
 - New Mobile Consolidation Members will receive a bonus unit rebate amount of HKD600 for the Eligible MPF Benefits transferred to the Eligible Account.
 - Existing Mobile Consolidation Members will receive a bonus unit rebate amount of HKD300 for the Eligible MPF Benefits transferred to the Eligible Account.
 - Transfer of minimum MPF benefits (MMB) or transfer of MPF accrued benefits under Employee Choice Arrangement (ECA) are not counted as Eligible MPF Benefits.
 - The aggregate Eligible MPF Benefits received in the Eligible Account must:
 - i. be transferred successfully to the Eligible Account within the period from 6 May 2024 to 30 September 2024 after the submission of the Scheme Member's Request for Fund Transfer Form / Scheme Member's Request for Account Consolidation Form in relation to the transfer of the Eligible MPF Benefits to the Eligible Account within the Promotion Period; and
 - ii. be held in the Eligible Account for at least 6 months from the date the Eligible MPF Benefits having been successfully transferred to the Eligible Account (**'Transfer-in Holding Period'**); and
 - iii. not be transferred out or withdrawn from the Eligible Account before the bonus units are allocated or during the Transfer-in Holding Period.
 - The relevant bonus units will be credited to the Eligible Member's Eligible Account as 'Preserved MPF Transfer' according to (i) the investment choice(s) of the Eligible



Account and (ii) the unit prices of the relevant Constituent Fund(s) as of the date of allocation. The relevant bonus units will be credited on any business day within the next 2 months after the 6-month Transfer-in Holding Period (based on the transaction date on which the last successful transfer of the Eligible MPF Benefits is received).

- Each Eligible Member is entitled to enjoy the rebate under the May - July Special Mobile Offer ONE time only.
 - Members cannot enjoy the May - July Special Mobile Offer as both a New Mobile Consolidation Member and an Existing Mobile Consolidation Member.
 - The May - July Special Mobile Offer can be enjoyed in conjunction with the HSBC MPF Personal Account Consolidation Offer offered concurrently by HSBC, which is subject to separate terms and conditions.
 - The Eligible Member shall not receive any bonus units from the May - July Special Mobile Offer if the Eligible Account is cancelled or terminated before the bonus units are allocated.
4. The bonus units from the May - July Special Mobile Offer allocated to the Eligible Member's Eligible Account are part of the account balance and shall be subject to the relevant fees and charges applicable to the HSBC Mandatory Provident Fund - SuperTrust Plus. For details of the fees and charges, please refer to the MPF Scheme Brochure.
 5. The bonus units will be reflected as 'Special Bonus' in the Mandatory Provident Fund Member Benefit Statement for the financial period of the scheme.
 6. The bonus units allocation shall not be in the form of cash or cash equivalent at the time of payout.
 7. In the event of any disputes arising from the entitlement of the bonus units from the May - July Special Mobile Offer, HSBC's decision shall prevail and be final and conclusive.
 8. HSBC reserves the right to change these terms and conditions at any time and the May - July Special Mobile Offer may be withdrawn and / or terminated by HSBC at its discretion without prior notice to members.
 9. Should there be any discrepancy between the English and Chinese versions of these terms and conditions, the English version shall apply and prevail.
 10. No person other than you and HSBC will have any right under the Contracts (Rights of Third Parties) Ordinance to enforce or enjoy the benefit of any of the provisions of these terms and conditions.
 11. These terms and conditions are governed by, and construed in accordance with, the laws of the Hong Kong Special Administrative Region.



Customers have a right to request that their personal data are not to be used for direct marketing purposes. Requests can be made in writing 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.

Investment involves risks. Past performance is not indicative of future performance. For further details including the product features and risks involved, please refer to the MPF Scheme Brochure.

Issued by The Hongkong and Shanghai Banking Corporation Limited