



HAITONG MPF RETIREMENT FUND 海通 MPF 退休金
SPECIAL VOLUNTARY CONTRIBUTION ACCOUNT 特別自願性供款帳戶
MEMBERSHIP APPLICATION FORM 成員申請表格

Note 注意:

- ◆ The Special Voluntary Contribution Account is only applicable to the existing members of Haitong MPF Retirement Fund (the "Plan"). 此特別自願性供款帳戶只適用於現有海通 MPF 退休金 ("本計劃") 成員。
- ◆ Please read the latest Explanatory Memorandum (and any Addenda thereto) of the Plan carefully before you complete this form. 填表前, 請先細閱本計劃最新基金說明書 (及其附錄)。
- ◆ You are required to provide the personal information indicated with symbol [®]. Otherwise, we may not be able to process your instruction. 閣下必須提供以符號 [®] 表示的個人資料。否則, 我們將可能無法處理您的指示。
- ◆ Please fill in this Form carefully. Any amendments should be clearly marked and counter-signed. Please do not use correction fluid. 請小心填寫此表格。如有任何資料刪改, 請必須加簽及避免用塗改液刪改資料。
- ◆ Please send the completed form together with the required documents to **Member Services, Fund Services Hong Kong, HSBC Institutional Trust Services (Asia) Limited, P.O. Box 73448, Kowloon Central Post Office, Hong Kong.** 請將填妥表格連同所需文件郵寄致 **香港九龍中央郵政局郵政信箱 73448 號, 滙豐機構信託服務 (亞洲) 有限公司, 退休金行政部收。**

PART I - PERSONAL INFORMATION 第一節 個人資料

[®] Member English Name 成員英文姓名 <input type="checkbox"/> Mr 先生 <input type="checkbox"/> Ms 小姐 <input type="checkbox"/> Mrs 女仕 <small>(Must be identical to the one shown on your Hong Kong ID Card / Passport 須與閣下之香港身份證 / 護照上的姓名相同)</small>		Member Chinese Name 成員中文姓名
Surname 姓 _____		
First Name 名 _____		
[®] Nationality 國籍 _____	[®] <input type="checkbox"/> Hong Kong ID Card No. 香港身份證號碼 / <input type="checkbox"/> Passport No. 護照號碼 _____	
[®] Date of Birth 出生日期 Day 日 _____ Month 月 _____ Year 年 _____	Sex 性別 <input type="checkbox"/> Male 男 <input type="checkbox"/> Female 女	
[®] Contact Tel. No. 聯絡電話號碼 _____	Mobile No. 手提電話號碼 _____	
Fax No. 傳真號碼 _____	Email Address 電郵地址 * _____	
[®] Residential Address 住址 (P.O. Box address will not be accepted. 郵政信箱恕不接受)		
Flat / Rm 室 _____	Floor 樓 _____	Block 座 _____
Building / Estate Name 大廈 / 屋苑名稱 _____		
Number & Name of Street 街道號碼及名稱 _____		
District 地區 _____ <input type="checkbox"/> H.K 香港 <input type="checkbox"/> Kln 九龍 <input type="checkbox"/> N.T. 新界 *		
[®] Job Details 職業資料		
Job Position 職位 _____	Nature of Business 業務性質 _____	
[®] Monthly Salary/Income 月薪 / 收入		
<input type="checkbox"/> HKD10,000 or below	<input type="checkbox"/> HKD10,001 or HKD20,000	<input type="checkbox"/> HKD20,001 – HKD30,000
<input type="checkbox"/> HKD30,001 – HKD50,000	<input type="checkbox"/> HKD50,001 or above	
Participation Details 參與資料 (Please ✓ the appropriate box. 請在適當的空格填上 ✓ 號)		
I am an existing member of the Haitong MPF Retirement Fund as 本人現為海通 MPF 退休金		
<input type="checkbox"/> An Employee Member 僱員		
<input type="checkbox"/> A Self-Employed Member 自僱人仕		
<input type="checkbox"/> A Personal Account Member 個人帳戶成員		

Please ✓ the appropriate box 請在適當空格填上 ✓ 號

*Please provide one email address only. 請只填寫一個電郵地址

HSBC Institutional Trust Services (Asia) Limited
滙豐機構信託服務 (亞洲) 有限公司

PART II - SPECIAL VOLUNTARY CONTRIBUTION DETAILS 第二節—特別自願性供款細則

Please ✓ the appropriate box. 請在適當的空格填上 ✓ 號

Regular Special Voluntary Contributions- 定期特別自願性供款

- I would like to contribute HKD _____ (minimum amount: HKD500) to my Special Voluntary Contribution Account as Regular Special Voluntary Contributions on a monthly basis.
本人希望每月供款港幣_____ (最低金額為港幣伍佰元正) 至本人之特別自願性供款帳戶作為定期特別自願性供款。

Note 注意：

- Monthly Regular Special Voluntary Contributions MUST be made by direct debit from a Hong Kong licensed bank. Please complete the attached Direct Debit Authorisation Form in Part IV for direct debit authorisation.
每月定期特別自願性供款必須經由香港持牌銀行直接付款。請填妥隨表第四部份的直接付款授權書給予直接付款授權。
The first Regular Special Voluntary Contributions will be debited from your bank account upon completion of the direct debit authorisation process. Normally, this process takes 2 to 4 weeks for HSBC accounts and 4 to 6 weeks for accounts with other banks. 第一期定期特別自願性供款將待完成開立您的直接付款授權程序後由您的銀行帳戶支付。如使用滙豐銀行戶口一般需時約兩星期至四星期，而其他銀行戶口則一般需時約四星期至六星期。
- The above amount will be deducted from your bank account specified in your Direct Debit Authorisation Form on the 3rd day of each month. If the debit date is not a bank clearing day, it will be deducted from your account on the following clearing day. The monthly contribution will be invested within 5 working days after the debit date.
以上金額將會在每月的第三天由您已授權的銀行戶口內扣除。如支付日期不是銀行結算日，該款項將由下一個結算日扣除。每月供款將於支付日期後五個工作天內作出投資。

Lump Sum Special Voluntary Contributions 一次性特別自願性供款

- I would like to contribute HKD _____ (minimum amount: HKD1,000) to my Special Voluntary Contribution Account as a Lump Sum Special Voluntary Contributions.
本人希望供款港幣_____ (最低金額為港幣壹仟元正) 至本人之特別自願性供款帳戶內作為一次性特別自願性供款。

Note 注意：

- Please note that postdated cheque will not be accepted. 請注意期票恕不接受。
- Please enclose a crossed cheque made payable to “HSBC Institutional Trust Services (Asia) Limited – Haitong MPF Retirement Fund”. 請連同劃線支票抬頭支付 “HSBC Institutional Trust Services (Asia) Limited – Haitong MPF Retirement Fund”。
- Please note that your cheque must be drawn by the applicant as shown on Part I and issued by a Hong Kong licensed bank. We do not accept cheque drawn by third parties on behalf of the applicant. Otherwise, such payment will not be accepted. 請注意您的支票必須以第一部份申請人名義經由香港持牌銀行發出。我們將不接受第三者代付的支票。否則，此款項將不被接納。
- The Lump Sum Special Voluntary Contributions is contribution in addition to your Regular Special Voluntary Contributions (if any). 此一次性特別自願性供款是您的定期特別自願性供款 (如有) 以外的額外供款。

PART III - INVESTMENT MANDATE 第三節—投資授權

In the event that you do not make any investment choices, please be reminded that your contribution made and/or benefits transferred into the Plan will unless otherwise provided in the Explanatory Memorandum be invested in accordance with the Default Investment Strategy.
如您沒有作出任何投資選擇，其累算權益 (包括供款) 除非基金說明書另有列明將會按照預設投資策略進行投資。

Regular contributions and transfer-in asset (if any) from another scheme shall be allocated for investment in the following manner:
定期供款及轉移自另一計劃的累算權益 (如適用) 將按下列分配投資：

Name of Constituent Funds 成分基金名稱	Investment Allocation (Complete in multiples of 1%) 投資分配 (請以 1% 或其倍數填寫)
Default Investment Strategy (Please refer to Note 3) 預設投資策略 (請參閱備註 3)	%
Haitong MPF Conservative Fund 海通強積金保守基金	%
Haitong Global Diversification Fund 海通環球分散基金	%
Haitong Asia Pacific (excluding HK) Fund 海通亞太 (香港以外) 基金	%
Haitong Hong Kong SAR Fund 海通香港特區基金	%
Haitong Korea Fund 海通韓國基金	%
Haitong Core Accumulation Fund (Please refer to Note 4) 海通核心累積基金 (請參閱備註 4)	%
Haitong Age 65 Plus Fund (Please refer to Note 4) 海通 65 歲後基金 (請參閱備註 4)	%
	100%

Note 注意：

1. The Investment Allocation specified above will apply in respect of special voluntary contributions paid by you to your Special Voluntary Contribution Account.

以上指定的投資分配將適用於您支付在特別自願性供款帳戶內的特別自願性供款。

2. If you do not specify the Investment Allocation above, the Trustee will invest the special voluntary contributions in accordance with the DIS. If any allocation to a Constituent Fund/DIS in the above table is not in the multiples of 1% or if the total allocation is not equal to 100%, the allocation relating to that portion will be rejected and the Trustee will invest the portion in accordance with DIS. Moreover, under any of the following situations, your investment allocation will be defaulted as DIS:
 - a) The form is unsigned
 - b) Alternations to this form are not counter-signed
 - c) Compulsory fields on this form are not complete or the information given in these fields is invalid
 - d) The investment allocation is not specified or incorrectly specified in this form
 - e) The completed form is received after the contributions and the transfer-in asset (if any) from another scheme were received

如果您沒有提供上述投資分配指示，信託人會將特別自願性供款按照預設投資策略作出投資。假若上述的成分基金或 DIS 投資分配非以 1% 或其倍數填寫或分配總和不等於 100%，該部份的投資分配將會被視作無效，而信託人會將該部份按照預設投資策略作出投資。此外，在下列任何一個情況下，您的投資分配指示將被設定為預設投資策略：

- a) 本表格未有簽署
- b) 未有就本表格上所刪改的資料加簽
- c) 未有填妥所有在本表格上必須填寫的部分或就該部份所填寫的資料無效
- d) 投資分配沒有填寫或不清楚填寫
- e) 當收到填妥的表格前，信託人已收到供款及轉移自另一計劃的累算權益（如適用）

3. Default Investment Strategy (DIS)

- a) When you are below the age of 50, all contributions and accrued benefits transferred from another scheme will be invested into Haitong Core Accumulation Fund.
- b) When you are between the ages of 50 and 64, all contributions and accrued benefits transferred from another scheme will be invested according to the allocation percentages between Haitong Core Accumulation Fund (CAF) and Haitong Age 65 Plus Fund (A65F) as set out in the De-risking table for DIS. The de-risking is to be achieved by annual adjustments of asset allocation gradually from the CAF to the A65F under the DIS. Please refer to the details set out in the latest Explanatory Memorandum.
- c) When you reach the age of 64, all contributions and accrued benefits transferred from another scheme will be invested in the A65F.

預設投資策略 (DIS)：

- a) 當您未滿 50 歲，所有供款及轉移自另一計劃的累算權益將會投資於海通核心累積基金。
- b) 當您年齡介乎 50 至 64 歲，所有供款及轉移自另一個計劃的累算權益將會按照預設投資策略降低風險列表中海通核心累積基金 (CAF) 與海通 65 歲後基金 (A65F) 之間的配置百分比進行投資。預設投資策略將會按年調整資產配置，逐步將投資從預設投資策略下的 CAF 轉移至 A65F 以達致降低風險。詳情請參閱最新的基金說明書。
- c) 當您年屆 64 歲，所有供款及轉移自另一個計劃的累算權益將會投資於 A65F。

4. Please note that the de-risking will not apply when you choose Haitong Core Accumulation Fund and / or the Haitong Age 65 Plus Fund as individual fund choice(s) (rather than as part of the DIS).

請注意，若您選擇以海通核心累積基金或/及海通 65 歲後基金作為單獨投資，預設投資策略的降低風險機制將不適用（即非預設投資策略的一部份）。

5. Please refer to the latest Explanatory Memorandum of the Plan for further details of Default Investment Strategy. Further, please note that the Trustee may, without liability, treat any information received from you from time to time as being accurate and the Trustee may reasonably act in reliance on such information.

預設投資策略詳情請參閱基金說明書。請注意，信託人可視您不時提供的任何資料均為準確資料，並可依賴有關資料採取合理的行動，而毋須承擔任何責任。

6. If you would like to change your investment allocation and / or not to invest into DIS in the future, please complete the “Change of Investment Switching/Redirection Form”.

如您希望更改投資分配及/或不投資於預設投資策略，請填寫「更改投資轉換／未來投資表格」。

PART IV - DIRECT DEBIT AUTHORISATION 第四節—直接付款授權書

Note 注意：If you would like to set up a direct debit authorisation for joint name bank account, please contact Haitong MPF 24 Hours Auto-Info-line at 2500-1600 to obtain and complete a Direct Debit Authorisation Set-up Form for Joint Name Bank Account. 如閣下希望為聯名銀行戶口開立直接付款授權書，請致電海通 MPF 24 小時自助資訊通 2500-1600 索取並填寫聯名銀行戶口適用的開立直接付款授權書。

Name of party to be credited (The Beneficiary) 收款的一方 (受益人) HSBC Institutional Trust Services (Asia) Limited – Haitong MPF Retirement Fund	Account Number of The Beneficiary 受益人戶口號碼 500-613625-001
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I hereby authorise my below-named Bank to effect transfers from my account to that of the above-named beneficiary in accordance with such instructions as my Bank may receive from the beneficiary and/or its banker from time to time.

本人現授權本人的下述銀行，（根據受益人或其往來銀行不時給予本人銀行的指示）自本人的戶口內轉帳予上述受益人。

I agree that my Bank shall not be obliged to ascertain whether or not notice of any such transfer has been given to me.

本人同意本人的銀行毋須證實該等轉帳通知是否已交予本人。

I accept full responsibility for any overdraft (or increase in existing overdraft) on my account which may arise as a result of any such transfer(s).

如因該等轉帳而令本人的戶口出現透支（或令現時的透支增加），本人願承擔全部責任。

I confirm that my signature(s) on this authorisation form is the same as that for the operation of my savings/current account to be debited for the transfer. 本人確認，本人於本授權書上的簽名，與本人的儲蓄／往來戶口所簽者完全相同。

I agree to notify the above-named beneficiary of any change of bank account or cancellation of payment method and further agree that should there be insufficient funds in my account to meet any transfer hereby authorised, my Bank shall be entitled, at its discretion, not to effect such transfer in which event the Bank may levy the usual charge to be paid by me. 本人同意給予受益人任何更改銀行戶口或取消付款方法的通知，並且同意如本人的戶口並無足夠款項支付該等授權轉帳，本人的銀行有權不予轉帳，且銀行可向本人收取慣常的費用。

This authorisation shall have effect until further notice. 本授權書將繼續生效直至另行通知為止。

I hereby authorise HSBC Institutional Trust Services (Asia) Limited, to initiate and arrange for contributions to be debited from my bank account according to the following specification, in favour of HSBC Institutional Trust Services (Asia) Limited – Haitong MPF Retirement Fund

本人現授權 HSBC Institutional Trust Services (Asia) Limited 從本人下述銀行的戶口內，提出及安排扣除供款，以支付予 HSBC Institutional Trust Services (Asia) Limited – Haitong MPF Retirement Fund。

Bank and branch name 銀行及分行名稱：			
Bank no. 銀行編號	Branch no. 分行編號	Account no. to be debited 扣款戶口號碼	Account Type 戶口種類 <input type="checkbox"/> Current account 往來戶口 <input type="checkbox"/> Saving account 儲蓄戶口
Details of account holder as on Statement/Passbook 戶口持有人於結單／存摺上所紀錄的資料			
Name of account holder 戶口持有人姓名 <i>(must be the same as the name stated in Part I 必須與 I 欄填寫的姓名相符)</i>		Signature of account holder 戶口持有人簽署 X	
		Date 日期	

PART V – DECLARATIONS 第五節 - 聲明

- I confirm that I have read and understood the latest Explanatory Memorandum (and any Addenda thereto) of the Plan and I acknowledge that my participation in the Plan is subject to the terms of such Explanatory Memorandum (and any Addenda thereto). I undertake to comply with and be bound by the relevant provisions of the Trust Deed of the Plan and all applicable laws including, but not restricted to, the Mandatory Provident Fund Schemes Ordinance (Cap. 485) and all regulations promulgated thereunder, together with all rules, policies or other such requirements issued by the Mandatory Provident Fund Schemes Authority (collectively, the “MPF Legislation”), in connection with my participation in the Plan. 本人確認本人已認知及了解本計劃的最新基金說明書（及其附錄）及根據這些基金說明書（及其附錄）參與本計劃。就本人參加本計劃，本人同意並遵從本計劃契約中的相關條款及所有適用的法例，包括但不限於強制性公積金計劃條例(Cap.485)及其下所公佈的條例，連同所有規條，政策或其他由強制性公積金計劃管理局發出的相關要求（統稱『強積金法規』）所約束。
- I confirm that the information provided by me on this Form is true and complete, and authorise the Trustee to confirm this from any source the Trustee may choose. 本人確定在此表格上填寫的資料均屬完備及確實無訛。本人授權信託人用任何渠道確實資料的真確。
- I declare I am an existing member of the Haitong MPF Retirement Fund. 本人聲明本人是現有海通 MPF 退休金計劃成員。
- I understand that in the absence of gross negligence, fraud or bad faith the Trustee will not be liable for any delay in processing my application or intended contributions, any discrepancy between my intended investment allocation as set out under Part III above and the allocation actually used for my contributions, or for any other loss, cost or liability whatsoever related to my membership in the Plan. 本人明白在沒有重大過失、欺詐或惡信的情況下信託人將不會負責有關處理本人參加計劃或供款之延誤、真正的投資分配與第三部不同而引致本人負上的任何其他損失、費用或責任。
- I hereby agree to indemnify the Trustee against any actions, proceedings, claims, losses, damages, costs or expenses which may be brought against the Trustee (as the case may be) or suffered or incurred by the Trustee (as the case may be) arising either directly out of or in connection with the Trustee accepting facsimile instructions and acting thereon, whether or not the same are confirmed by me in writing. 本人同意並授權信託人接受傳真指示及根據該等指示處理有關事宜，而不須本人之確認。信託人無須因此而直接或間接負上任何責任，賠償，損失或費用。Notwithstanding the previous paragraph, the Trustee has the right to determine which Forms or other documents of instructions may or may not be accepted by facsimile. 儘管有上段之規定，信託人有權決定接受何種傳真表格或指示。
- Unless and until instructed otherwise, my signature below shall be treated as a specimen signature for the purpose of future verification of written instructions to the Trustee. 除再有本人的指示，否則信託人將以本人以下之簽署作為簽署式樣以確認日後的書面指示。
- I understand that a Special Voluntary Contribution (SVC) Member is not entitled to transfer amounts held to the SVC Member’s credit in the Plan to another registered scheme. 本人明白特別自願性供款成員不可把本計劃內的特別自願性供款轉移往另一項註冊計劃。
- This application and my participation in the Plan shall be governed by and construed in accordance with the laws of The Hong Kong Special Administrative Region. 本人的申請及參與本計劃將根據香港特別行政區法律管轄。**

9. I agree that 本人同意：

- (i) subject to any applicable laws of Hong Kong Special Administrative Region, information supplied on the Form and otherwise in connection with my participation in the Plan may be held by the Trustee and will be used for the purposes of processing my participation in the Plan, and may also be used for the purpose of carrying out my instructions or responding to any enquiry purporting to be given by me or on my behalf, dealing with any other matters relating to my participation in the Plan (including the mailing of reports or notices), forming part of the records of the recipient as to the business carried on by it, observing any legal, governmental or regulatory requirements of any relevant jurisdiction (including any disclosure or notification requirements to which any recipient of the data is subject) and to provide a marketing database for product and market research if they are relevant to the Plan or to provide information for the dispatch of information on other products or services to me from the Sponsor or any connected person of the Sponsor if such products or services relate to the Plan. All such information may be retained after I have ceased to participate in the Plan.

根據香港特別行政區有關法例規定下，信託人可保留本表格所載資料及其他有關申請參予本計劃的資料，以作為進行本人申請參加本計劃之用；同時亦可用作執行本人的指示或答覆本人的查詢；或其他有關參與本計劃之事項（包括郵寄報告或通告），此等資料將構成收款人業務之部份記錄；以遵行任何有關適用司法管轄區的法律、政府或監管規定（包括任何所屬收款人的資料披露及通知的規定）；及提供保薦人或其有關連人仕用作推廣與本計劃相關的產品及市場研究、或向本人發放其他與本計劃相關的產品或服務資料。在本人終止參與本計劃後，信託人仍可保留上述所有資料。

- (ii) Upon request, I am entitled under the Personal Data (Privacy) Ordinance (“PDPO”) to be informed by the Plan’s Sponsor, “Haitong International Investment Managers Limited” whether it holds personal data as defined under PDPO about me and to request access to and/or correction of any such data. I also have right to inform the Plan’s Sponsor anytime if I do not wish to receive any marketing materials in relation to the Plan. Any such request may be made by post to the Client Servicing Officer, Haitong International Investment Managers Limited, 22/F Li Po Chun Chambers, 189 Des Voeux Road Central, Hong Kong.

如有需要，本人有權就《個人資料（私隱）條例》（“該條例”）要求本計劃的保薦人“海通國際投資經理有限公司”提供是否持有本人該條例所定義的個人資料，或要求接觸和／或更改任何該等資料。若本人不欲再收取任何與本計劃相關的市場推廣資料，本人亦有權為此隨時通知本計劃的保薦人。此類要求，可以書面查詢，郵寄香港德輔道中 189 號李寶椿大廈 22 樓，海通國際投資經理有限公司一客戶服務主任收。

- (iii) In order to provide services or hardware such as administrative, computer, operational support and etc. which are relevant to the Plan, the Trustee may disclose and transfer such information to the auditors of the Plan and the Sponsor, including any of their employees, officers, directors and agents and/or to the ultimate holding company of the Sponsor and the Trustee and/or their subsidiaries and/or affiliates or to any third party employed to provide administrative, computer or other services or facilities to any person to whom data is provided or may be transferred as aforesaid. The Trustee may also make disclosure or transfer data to any judicial or regulatory authority entitled thereto by law or regulation (whether such authorities are statutory or not), in connection with my participation in the Plan. Provision of data made by the Trustee pursuant to this clause may be to any persons outside Hong Kong.

為提供與本計劃相關的行政、電腦、營運支援等服務或設備，信託人可披露或轉交有關參與本計劃的資料予本計劃的核數師和保薦人，及其僱員、主任、董事及代理人；及／或保薦人及信託人的最終控股公司；及／或附屬公司及／或聯營機構；或其僱用之第三者以提供行政、電腦或其他服務或設備。信託人亦可披露或轉交有關參與本計劃的資料予任何法律或法規授權之任何司法或監管機構（無論該等機構是否法定機構）。信託人可按本條披露或轉交資料予非居港人士。

- (iv) I am required to provide the information supplied on the Form or otherwise in order for the Trustee to properly process my membership and benefits under the Plan. I have the right to obtain access and to request correction of any personal information concerning myself held by the Trustee. Request for such access can be made in writing and addressed to “Member Services, Fund Services Hong Kong, HSBC Institutional Trust Services (Asia) Limited, P.O. Box 73448, Kowloon Central Post Office, Hong Kong”.

本人需要提供本表格所載資料及其他資料以供信託人適當地申請本人於本計劃的成員身份及利益。本人有權向信託人查閱及要求修正關於本人之任何資料。有關要求可書面向信託人提出，並郵寄「香港九龍中央郵政局郵政信箱 73448 號，滙豐機構信託服務（亞洲）有限公司，退休金行政部」收。

- I do not wish to receive any marketing materials in relation to the Plan from the Sponsor, Haitong International Investment Managers Limited, please this box.

本人不希望收取由保薦人“海通國際投資經理有限公司”提供任何與本計劃相關的市場推廣的資料，請在空格填上 號。

10. Unless the context otherwise requires, words and expressions defined in the Trust Deed have the same meanings in this Declaration. 除文義另有規定外，信託契約所列詞語及詞句與本聲明所載者相同。

11. This Declaration shall be governed by and construed in accordance with the laws of The Hong Kong Special Administrative Region. 本聲明須受香港特別行政區法律監管，並須按此詮釋。

Signature of Member 成員簽署

Date 日期

(This signature will also act as a specimen signature for future correspondences. 日後有關本計劃之簽署，將以此簽署式樣為準。)

(Please the appropriate box. 請在適當的空格填上 號)

Please provide the following documents together with this Application Form for account opening: We will not be able to process your application if the following documents are outstanding. 請提供以下文件連同此表格作為開設帳戶之用。如下列文件有任何遺漏，將可能無法為閣下處理申請。

- A Certified Copy¹ of Hong Kong Permanent Identity Card or Passport, and 已核證¹的香港永久性居民身份證／護照副本；及
- An original or a Certified Copy¹ of residential address proof (utility bill or bank statement) which is issued within the latest 3 months. Please note that the mobile phone bill will not be accepted. 一張最近三個月內發出的住址證明正本或已核證¹的副本（公共事業的繳費單或銀行月結單）。請注意手提電話月結單恕不接受。
- Crossed Cheque 劃線支票 (For Lump Sum Special Voluntary Contributions 一次性特別自願性供款)
- Direct Debit Authorisation Set Up / Change of Direct Debit Account Form for Joint Name Bank Account Form (if applicable) 開立直接付款聯名戶口授權書／更改直接付款戶口表格－聯名銀行戶口適用（如適用）

¹ A certified copy means a copy of the original that has been sighted by an independent suitable certifier (“the certifier”). The certifier can be a certified public accountant, a lawyer, a notary public, a branch manager of a bank or director or manager of a regulated financial institution in a jurisdiction that is a Financial Action Task Force (FATF) member or an equivalent jurisdiction or a SFC licensed or registered person. The name, capacity or position, contact telephone number and address of the certifier and the date of certification should be clearly shown, together with the wordings to indicate that the copy document is a true copy of the original (e.g. “Original Seen” or words to similar effect). Where documents are not in English, a notarised translation is required. The certified documents submitted by post are not returnable.

¹ 已核證副本是指文件的正本須經由一名獨立合適人士（「核證人」）查看。核證人包括打擊清洗黑錢財務行動特別組織（FATF）成員或同等司法管轄區內的執業會計師、律師、公證人或銀行的分行經理或受監管的金融機構之經理或主管或香港證監會持牌人或監管人。副本須列明核證人的姓名、身份或職位、聯絡電話及地址，以及列明核實日期，並附有可認證所提供之文件為真實副本的字句（例如：「已查看正本」或以同義句子陳述）。若該文件並非以英文書寫，其譯本必須提交並經由公證人核實。如使用郵寄方式遞交之核證文件，將恕不退還。