



MPF-CDM

**交通銀行愉盈退休強積金計劃（「本計劃」）**  
**BCOM JOYFUL RETIREMENT MPF SCHEME(“Scheme”)**

**Sponsor of Scheme : BOCOM MPF & Financial Services Company Limited**      **計劃保薦人：交銀積金理財服務有限公司**

**第一部：計劃成員資料 Part I: Scheme Member Information**

1) 計劃編號 Scheme No.		2) 香港身份證 / 護照號碼 HKID / Passport No.	
3) 計劃成員姓名 Scheme Member Name	中文 Chinese	英文 English	

**第二部：更新資料 Part II : Change of Data**

以下項目之更新生效日期 (日/月/年) Effective Date of Change (dd/mm/yyyy) \_\_\_\_\_

請在適當之方格內加上[✓] 號。如沒有註明，閣下的指示將自動適用於第(1)項。  
Please tick ✓ the appropriate box. If not specified, your instruction will automatically apply to (1).

請更新下列的資料於 Please make the change(s) to :

(1) 上述第一部份所填之香港身分證/護照號碼登記於本計劃內**所有帳戶**  
The records for **ALL** my accounts maintained in the Scheme under the HKID/Passport No. as stated above in Part I.

(2) 本人於上述第一部份所填之計劃編號之帳戶  
The account under the Scheme No. as stated above in Part I.

請在所需更新項目之方格內加上[✓] 號。Please tick ✓ the appropriate box(es) for the item(s) needed to be changed.

住址 Residential Address  
(郵政信箱恕不受理 P.O. Box will NOT be accepted) \_\_\_\_\_

通訊地址 Correspondence Address \_\_\_\_\_

電話號碼 (住宅) Telephone No. (Residential) \_\_\_\_\_

電話號碼 (手提)# Telephone No. (Mobile) \_\_\_\_\_

香港 Hong Kong     九龍 Kowloon  
 新界 New Territories     海外 Overseas

香港 Hong Kong    九龍 Kowloon  
 新界 New Territories     海外 Overseas

申請短訊服務 SMS Service Application (必須為有效香港手提電話號碼) (valid Hong Kong mobile no.)  
取消短訊服務 (如適用) SMS Service cancellation (if applicable)

- # 「帳戶結餘短訊服務」服務詳情如下:
- 每季度以短訊形式向成員提供截至季末的帳戶結餘。(帳戶結餘根據交通銀行信託有限公司電腦紀錄為準。) quarter-end
  - 短訊以參與表格(AOP-EE/SEP/PA)第一部份提供之有效香港手提電話號碼或及後更新的有效香港手提電話號碼發出。
  - 申請短訊服務方法如下:  
一般僱員/個人帳戶持有人/自僱人士(單一新帳戶申請):  
新成員於AOP-EE/SEP/PA表格第一部份申請人資料提供手提電話號碼及沒有剔選不申請短訊服務。 "Not apply for SMS service". I  
一般僱員/個人帳戶持有人/自僱人士/自積金帳戶持有人(單一/多個現有帳戶申請): Regular employee/Personal account holder/Self-employed person/SVC account holder (single/multiple existing account(s) application):  
現有成員於更改成員資料表格(MPF-CDM)第二部份提供/更新手提電話號碼及剔選申請短訊服務。 Existing "Apply for SMS service". II
  - 取消短訊服務，需填妥MPF-CDM表格或以書面形式通知本公司。
  - 發出短訊的最低帳戶結餘必須大於零。
  - 每條短訊可發送至多於一個已登記之手提電話號碼(如適用)。
  - 短訊語言設定為中文及英文。
  - 假如一般僱員供款帳戶內之強積金累積權益在僱員終止受聘後需自動轉移至同一計劃下已開立之個人帳戶，而該個人帳戶並未有登記此服務，供款帳戶結餘短訊服務將不會繼續適用於該個人帳戶。如欲申請該個人帳戶之帳戶結餘短訊服務，請填妥 MPF-CDM表格及寄回交通銀行信託有限公司營運部。

電郵地址 E-mail Address \_\_\_\_\_

新簽署式樣 New Signature Specimen

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

此新簽署式樣將取代所有本人以前留存於受託人之簽署式樣。除此部份之更改外，本人同意已由本人簽署有關上述帳戶之全部文件仍然有效。  
This new specimen signature shall supersede all previous ones on file with the Trustee. Except for the change(s) in this part, I hereby agree that all documents signed by me in relation to my account shall remain in full force and effect in all other respects.

**若閣下申請更改出生日期，將有可能影響「預設投資策略」的降低風險機制的處理時間(如適用)**  
由於「預設投資策略」採用預先釐定的資產配置，並純粹根據成員年齡來自動調節資產配置。因此閣下的出生日期對「預設投資策略」的執行非常重要。  
**The processing time of Default Investment Strategy ("DIS") de-risking may be affected if you apply for the changing of Date of Birth (if applicable)**  
As the DIS adopts pre-determined asset allocation and automatically adjusts asset allocation based only upon a member's age. Therefore, date of birth of a member is important for the execution of the DIS.

**請於填妥第一部、第二部及詳細閱讀「個人資料收集聲明」及「重要事項」後，於第五部簽署。 Please sign on Part V after completion of Part I and II and read through the "Personal Data Collection Statement" and the "Important Notes".**



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更改成員資料
Change of Data for Scheme Member

**第三部：個人資料收集聲明 Part III: Personal Data Collection Statement**

1. 交通銀行愉盈退休強積金計劃(「本計劃」)客戶及參與僱主所提供的個人資料及該等客戶的交易或事務往來的詳情僅供交通銀行信託有限公司(「交銀信託」,本計劃之受託人)、交銀積金理財服務有限公司(「交積財」,本計劃之保薦人)及交通銀行股份有限公司香港分行(「交通銀行」,本計劃之發起人)使用及處理。若未能向交銀信託提供有關資料,可能會導致交銀信託無法開立、管理及延續戶口或向客戶提供服務。另在交銀信託認為有需要或適當時,或會將該等資料提供予下列各方(不論在香港境內或境外)作以下第 2 項所述的用途:(i)就強積金業務運作向交銀信託提供行政、電訊、電腦或其他有關服務的任何代理人、承包商、或第三方服務供應商;(ii)交通銀行集團成員公司或其代理人;(iii)對交銀信託有保密責任且已承諾將該等資料保密的任何其他人士;(iv)客戶與之進行或擬與之進行交易的任何銀行、金融機構或其他機構;(v)任何司法管轄區的政府機關或監管機構;及(vi)交銀信託之實際或建議承讓人。
  2. 客戶的資料可能會作下列用途:- (i)開立、管理及延續客戶之戶口;(ii)為提供服務予客戶之日常運作;(iii)為客戶設計服務或產品;(iv)更新及/或核實由交通銀行集團成員公司或其代理人所持有的客戶個人資料;(v)進行配對程序;(vi)遵守適用之法例、政府或監管規定而作出披露;(vii)促使交銀信託之實際或建議承讓人評核擬進行的交易;及(viii)所有其他相關之目的。而該等資料之運用將會受制於個人資料(私隱)條例(「私隱條例」)及強制性公積金計劃條例。
  3. 客戶的資料可能會用於直接促銷,而為此須獲得客戶同意(包括表示不反對)。就此,請注意:
    - (i) 客戶的姓名、聯絡資料、產品及服務組合資料、交易模式及行為、財務背景及人口統計數據可用於直接促銷;
    - (ii) 可用作促銷下列類別服務、產品及促銷標的:
      - (1) 強積金、退休計劃及相關服務及產品;
      - (2) 財務、保險、信託、託管、信用卡、銀行及相關服務及產品;
      - (3) 獎賞、客戶或會員或優惠計劃及相關服務及產品;及
      - (4) 為慈善及/或非牟利用途的捐款及捐贈;
    - (iii) 上述服務、產品及促銷標的的可能由交銀信託、交積財、交通銀行及/或下列各方提供或(就捐款及捐贈而言)徵求:
      - (1) 交通銀行集團成員公司;
      - (2) 第三方金融機構、保險公司、受託人公司、信用卡公司、證券及投資服務供應商;
      - (3) 第三方獎賞、客戶或會員、合作品牌或優惠計劃提供者;及
      - (4) 慈善或非牟利機構;
    - (iv) 除由交銀信託、交積財及交通銀行促銷上述服務、產品及促銷標的以外,交銀信託亦擬將以上 3(i)段所述的資料提供予以上 3(iii)段所述的任何人士,只供該等人士在促銷強積金及相關服務及產品中使用,而為此用途須獲得客戶書面同意(包括表示不反對)。
    - (v) 以上 3(i)段所述的資料將不會提供予以上 3(iii)段所述的任何人士促銷非強積金服務或產品。

如客戶不希望其資料被如上所述使用或將其資料提供予其他人士作直接促銷用途,客戶可通知交銀信託行使其選擇權拒絕促銷或於以下方格加上“√”號。

本人不希望本人的個人資料被用作直接促銷。
  4. 如客戶要求查閱或更改其個人資料,可致函香港中環德輔道中 121 號遠東發展大廈一樓交通銀行信託有限公司資料保護主任。根據私隱條例,交銀信託有權就處理任何查閱個人資料的要求收取合理費用。
- Personal data supplied by customers and Participating Employers of the BCOM Joyful Retirement MPF Scheme (“Scheme”) and details of transactions or dealings by such customers will only be accessed and handled by Bank of Communications Trustee Ltd. (“Bocom Trustee”, the trustee of the Scheme), BOCOM MPF & Financial Services Company Limited (“Bocom MFS”, the sponsor of the Scheme) and Bank of Communications Co., Ltd. Hong Kong Branch (“Bank of Communications”, the promoter of the Scheme). Failure to supply such data may result in Bocom Trustee unable to open or continue accounts or provide services. Bocom Trustee may, where it considers necessary or appropriate, provide such data to the following parties (whether within or outside Hong Kong) for the purposes set out in item 2 below :- (i) any agent, contractor or third party service provider who provides administrative, telecommunication, computer or other services to Bocom Trustee in connection with the operation of its MPF business; (ii) Bank of Communications Co., Ltd (“BOCOM”)’s group companies or its agent; (iii) any other person under a duty of confidentiality to Bocom Trustee which has undertaken to keep such information confidential; (iv) any bank, financial institution or other institution with which the customers have or propose to have dealings; (v) any government authorities or regulatory bodies in any jurisdiction; and (vi) any actual or proposed assignee of Bocom Trustee.
- The personal data relating to a customer may be used for the following purposes:- (i) opening, administering and continuation of the customer’s account; (ii) the daily operation of the services provided to the customer; (iii) designing services or products for the customer’s use; (iv) updating and/or verifying customers’ personal information that may be held by BOCOM’s group companies or its agent; (v) conducting matching procedures; (vi) complying with applicable legal, governmental or regulatory requirements for making disclosure; (vii) enabling any actual or proposed assignee of Bocom Trustee to evaluate the intended transaction; and (viii) all other incidental and associated purposes relating thereto. The usages of such data will at all times be governed by the provisions of the Personal Data (Privacy) Ordinance (“PDP Ordinance”) and Mandatory Provident Fund Schemes Ordinance.
- Customer’s data may be used in direct marketing and this requires the customer’s consent (which includes an indication of no objection) for that purpose. In this connection, please note that:
- (i) the name, contact details, products and services portfolio information, transaction pattern and behaviour, financial background and demographic data of a customer may be used in direct marketing;
  - (ii) the following classes of services, products and subjects may be marketed:
    - (i) MPF, retirement schemes and related services and products;
    - (ii) financial, insurance, trust, custody, credit card, banking and related services and products;
    - (iii) reward, loyalty or privileges programmes and related services and products; and
    - (iv) donations and contributions for charitable and/or non-profit making purposes;
  - (iii) the above services, products and subjects may be provided or (in the case of donations and contributions) solicited by Bocom Trustee, Bocom MFS, Bank of Communications and/or:
    - (1) BOCOM ’s group companies;
    - (2) third party financial institutions, insurers, trust companies, credit card companies, securities and investment services providers;
    - (3) third party reward, loyalty, co-branding or privileges programme providers; and
    - (4) charitable or non-profit making organizations;
  - (iv) in addition to marketing the above services, products and subjects by Bocom Trustee, Bocom MFS and Bank of Communications, Bocom Trustee also intends to provide the data described in paragraph (3)(i) above to any of the persons described in paragraph (3)(iii) above for use by them in marketing MPF and related services and products only, and this requires the customer’s written consent (which includes an indication of no objection) for that purpose;
  - (v) the data described in paragraph (3)(i) above would not be provided to any of the persons described in paragraph (3)(iii) above for use by them in marketing non-MPF services or products.
- If a customer does not wish his data being used as described above or provide to other persons for use in direct marketing, the customer may exercise his opt-out right by notifying Bocom Trustee or tick the following box.
- I do not wish my personal data being used in direct marketing.
- The person to whom requests for access to data or correction of data, please write to the Data Protection Officer, Bank of Communications Trustee Limited, 1/F., Far East Consortium Building, 121 Des Voeux Road Central, Hong Kong. In accordance with the terms of the PDP Ordinance, Bocom Trustee has the right to charge a reasonable fee for the processing of any data access request.



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更改成員資料 Change of Data for Scheme Member

**第四部：重要事項 Part IV : Important Notes**

1. 本人知道，發出任何傳真指示所牽涉或與之有關的可能的各項風險。「交通銀行信託有限公司」(“貴公司”)在此獲不可撤銷及無條件地授權可依照或依賴貴公司自行酌情確定相信是由本人發出或看來符合上述計劃(一個或多個)的任何傳真指示行事，貴公司若誠實地按照未經授權人士或在任何其他情況下發出的傳真指示行事，貴公司無須承擔責任。此外，本人亦同意就貴公司因接受傳真指示及根據指示處理有關事宜，並因執行此指示而可能面對、招致、蒙受或遭受之一切損失、賠款、利息、費用、開支及索償而向貴公司作出免責保證，惟若因貴公司故意失責或嚴重疏忽別論。
2. 「交通銀行信託有限公司」可酌情拒絕執行任何以傳真方式發出的指示，並可要求以另一指定的正本書面指示。
3. 第三部份為最新的個人資料收集聲明(「新聲明」)，若閣下明白及同意該新聲明，則現時適用於閣下的個人資料收集聲明(如屬2013年3月或之前版本)將會被該新聲明所取代。如閣下不同意，請在此方格內  加上剔號(“√”)。

1. I am aware of the possible risks involved in or connected with the giving of any faxed instruction. Bank of Communications Trustee Limited (“Your Company”) are hereby irrevocably and unconditionally authorised to act on or rely upon any faxed instruction which Your Company in your sole discretion believe emanate from me or otherwise appear to comply with the terms of the mandate for the above scheme(s) and Your Company shall not be liable for acting in good faith on faxed instructions which emanate from unauthorised individuals or in any circumstances whatsoever. Moreover, I hereby agreed to indemnify Your Company against all losses, damages, interest, costs, expenses and claims which might be brought against or suffered or incurred by as a result or arising from accepting facsimile instructions and acting thereon, unless due to the willful default or gross negligence of.
2. Bank of Communications Trustee Limited may, in its absolute discretion, refuse to act upon any facsimile instructions received and may require original written instructions.
3. The Personal Data Collection Statement in Part III (“new statement”) is the latest version, if you understand and agree the new statement, the new statement will replace the existing Personal Data Collection Statement (if it is a version on or before March 2013) applicable to you. If you do not agree, please tick (“√”) this box .

**第五部：確認指示 Part V : Confirmed Instruction**

本人謹此同意及確認本人已閱畢並完全明白有關「個人資料收集聲明」及「重要事項」。本人現要求更改本人於交通銀行愉盈退休強積金計劃內以上資料，並確認所提供之資料實屬完備及準確。I hereby agreed and acknowledged that I/we have read and fully understand the “Personal Data Collection Statement” and the “Important Notes”. I hereby request to amend the above information of my account with BCOM Joyful Retirement MPF Scheme and confirm that the information provided is complete and accurate.



受託人核印

傳真 Fax: 2854-0203



計劃成員簽署 Signature of the Scheme Member

(請按現存於受託人之簽署式樣簽署。)

Please sign according to the existing specimen signature on file with the trustee)

日期 Date

**提示：Reminder:**

如閣下為交通銀行(香港)有限公司或交通銀行股份有限公司香港分行之客戶，請另行填寫“更改地址及/或電話號碼通知書”通知交通銀行(香港)有限公司或交通銀行股份有限公司香港分行。表格可於[www.bankcomm.com.hk](http://www.bankcomm.com.hk)下載。

If you are a customer of Bank of Communications (Hong Kong) Limited or Bank of Communications Co. Ltd., Hong Kong Branch, please also complete the “Notice for Change of Address and/or Telephone Number”, and submit to Bank of Communications (Hong Kong) Limited or Bank of Communications Co. Ltd., Hong Kong Branch. The form can be downloaded at [www.bankcomm.com.hk](http://www.bankcomm.com.hk).

填妥後請寄回香港中環德輔道中121號遠東發展大廈1樓，請註明交通銀行信託有限公司營運部收，或交回交通銀行(香港)有限公司或交通銀行股份有限公司香港分行各網點或傳真 2854-0203。Please return this form to **Operations Department, Bank of Communications Trustee Limited, 1/F, Far East Consortium Building, 121 Des Voeux Road Central, HK**, or return to any outlets of Bank of Communications (Hong Kong) Limited or Bank of Communications Co. Ltd., Hong Kong Branch or fax to 2854-0203.

受託人專用 For Trustee Use Only

日期 Date	覆核 Checker	經辦 Input
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