



PART A 甲部

Personal Information 個人資料

What should I pay attention to when I complete Personal Information? 當填寫個人資料部份時，有甚麼事項需要注意？

- To avoid delay of membership enrollment, benefit transfer and withdrawal, please make sure the name on the enrollment form under this section must be the same as the one appearing on your HKID Card / Passport
為免延誤成員登記及日後的權益轉移及提取，閣下在此部份填寫的姓名必須與香港身份證／護照相同。
- Member is required to provide a residential address according to Section 91 (2) of the MPF (General) Regulation (P.O. Box address and “In-care-of” address will not be accepted). If your correspondence address is different from the residential address, please provide your correspondence address separately. 根據強積金(一般)規例 91 (2)條，成員須提供住址資料(郵政信箱及「轉交」地址恕不接受)。如閣下的通訊地址與住宅地址不同，請另外提供通訊地址。
- All information (including any blank field) you provide in this section will be formed your official record in the BCT Strategic MPF Scheme. If you wish to update your personal information in the future, please inform the Trustee by filling a form or via BCTCall Member Hotline or BCT’s website.
閣下提供的所有資料(包括任何空白部份)將成為閣下在 BCT 強積金策略計劃內的正式記錄。如有任何更新，請填寫表格，或透過 BCT 積金熱線或 BCT 網頁通知信託人。



PART B 乙部

Tax Residency Self-Certification 稅務居民身份自我證明

What should I pay attention to when I complete Tax Residency Self Certification section? 當填寫稅務居民身份自我證明時，有甚麼事項需要注意？

- If your Tax Residence is in Hong Kong Only, please put a “✓” in the box under Section B.1.
如閣下之稅務居住地只有香港，請在乙.1 部分的方格填上「✓」。
- If the above does not apply, please provide all countries/jurisdictions (including Hong Kong (where applicable)) where you are a resident of those countries/jurisdictions for tax purposes and Taxpayer Identification Number or it’s Functional Equivalent (TIN) for each country / jurisdiction in Section B.2 – Tax Residency Self-Certification.
如上述部份不適用，請在表格乙.2 部分 – 稅務居民身份自我證明部份填寫閣下作為稅務居民的所有國家／司法管轄區（包括香港（如適用））及相關的稅務編號或具有等同功能的識辨編號（稅務編號）。
- A person’s tax residency is defined by having regard to jurisdiction-specific laws and individual/entity circumstances. If in doubt, members are advised to consult their tax advisor as BCT does not give tax or legal advice. Members may visit the following OECD website for more information on the tax resident rules of the respective jurisdictions. (<http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/>)
一個人的稅務居民定義是關於特定司法管轄區的法律和個人/實體情況。如有疑問，成員建議諮詢他們的稅務顧問，BCT 不提供任何稅務或法律建議。成員可以訪問以下經合組織有關稅收的更多信息的網站各自司法管轄區的居民規則。
(<http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/>)



PART C 丙部

Investment Mandate 投資指示

What do I have to take note when complete Part C - Investment Mandate? 在填寫丙部 – 投資選擇時，我需要留意甚麼？

- If no investment mandate is specified / what is specified is not a valid investment mandate, all future contribution or transfer-in asset will be 100% invested into DIS. For details, please refer to “Remarks” in Part C of the Enrollment Form.
如閣下沒有填上投資指示，或閣下所指定的並非有效的投資指示，該部份日後的所有供款或轉入資產，將100%投資於預設投資。詳情請參閱成員登記表格丙部的備註部份。

Guide to Membership Enrollment Form (Continued) 成員登記表格填寫須知 (續)



PART C 丙部

Investment Mandate 投資指示

Which column(s) do I have to complete under Part C - Investment Mandate?
在填寫丙部 – 投資選擇時，我必須填寫當中哪一欄？

- First, you will have to complete the “Mandatory Portion” column.
首先，閣下必須填寫「強制性供款部份」一欄。
- Secondly, if you or your employer will make voluntary contribution / you will have voluntary contribution balance transferred to the MPF Scheme, please also complete the “Voluntary Portion” column. (Please check with employer for the option of voluntary contribution)
然後，如閣下或閣下選擇作出自願性供款，或閣下有自願性供款結餘轉移至景順強積金策略計劃，請務必填寫「自願性供款部份」一欄。(請向僱主查詢自願性供款的安排)

Please note, the arrangement for voluntary contribution may not be applicable to participating employers. Please check with your employer before to make voluntary contribution arrangement.

請注意：自願性供款安排可能不適用於個別之參與僱主。閣下作出自願性供款前，請先向僱主查詢。



PART D 丁部

Employee Voluntary Contribution Details 僱員自願性供款細則

How can I make voluntary contribution?
如何可以作出自願性供款？

- You may indicate your intention to make regular voluntary contribution under **Part D – Employee Voluntary Contributions Details**. The amount of voluntary contribution that you indicate here will be deducted from your monthly payroll.
閣下可以在**丁部 – 僱員自願性供款細則**中作出自願性供款的安排。閣下在此欄填寫的自願性供款金額將每月在閣下的薪酬中扣除。
- Apart from the above arrangement, you may also make voluntary contribution directly to BCT Strategic MPF Scheme via Flexible Voluntary Contribution / Tax Deductible Voluntary Contribution. Please call BCT Call Member Hotline at (852) 2842-7878 for details.
除上述途徑，閣下亦可透過靈活自願性供款，或可扣稅自願性供款安排，直接向 BCT 強積金策略計劃作出自願性供款。請致電 BCT 積金熱線 (852) 2842-7878 查詢有關詳情。

Important Reminders 重要提示

Please be reminded to complete and return the Membership Enrollment Form to your employer as soon as possible.
請儘快將填妥的表格交回僱主。

If you fail to provide investment mandate, all contributions made by you and your employer will be invested in the Default Investment Strategy (“DIS”). If you subsequently wish to switch your balance which has been defaulted to the DIS, you will need to give an asset switch/change of investment instruction separately. Please refer to the information about the DIS in the offering documents (including the Key Scheme Information Document and the MPF Scheme Brochure) of BCT Strategic MPF Scheme.

若閣下沒有提供投資指示，閣下及僱主所作的供款將會投資於預設投資策略(「預設投資」)。如欲將上述已投資於預設投資的供款結餘轉換至其他基金，閣下必須另行作出資產轉換/更改投資指示。請參閱 BCT 強積金策略計劃的要約文件〈包括主要計劃資料文件及強積金計劃說明書〉。

No member account can be set up under below circumstances:

- you fail to return the Form, or
- the self-certificate is missing, or
- the information on the self-certificate is incomplete, or
- the information provided does not fulfill the reasonableness test.

If no member account can be set up, the contributions paid by or in respect of the relevant member will be withheld in cash until the member account is properly set up for investment.

以下情況則無法開立成員帳戶：

- 沒有交回表格 或
- 欠缺提供自我證明 或
- 自我證明上的資料不完整 或
- 所提供的資料不符合合理性測試。

如無法開立帳戶，相關成員的供款將以現金方式保存，直至成功開立成員帳戶後才進行投資。