

FORM MPF(S) - P(M)

**MANDATORY PROVIDENT FUND SCHEMES ORDINANCE (CAP. 485)
("the Ordinance")**

SCHEME MEMBER'S REQUEST FOR FUND TRANSFER FORM ^{Note 1}

NOTES:

- (1) *Please use BLOCK LETTERS for completion of this Form.*
 - (2) *Please read the explanatory notes carefully before completing this Form.*
 - (3) *Definition of terms is provided at Note 2.*
 - (4) ** means delete whichever is inappropriate.*
 - (5) *Please insert "N.A." if not applicable.*
 - (6) *The information and data provided in this Form can be used by the approved trustees concerned and the Mandatory Provident Fund Schemes Authority in activities relating to the processing of the transfer and may be disclosed to other parties for such purposes.*
 - (7) *If necessary, you may seek assistance from the approved trustee of your scheme or the MPFA.*
 - (8) *Upon completion of this Form, a scheme member should give this Form to:*
 - (a) *Transferor trustee: For election to have the benefits retained in the current master trust scheme.*
 - (b) *New employer: For election to have the benefits transferred to the contribution account in which the new employer is participating. The new employer should then give written notice of the election to the transferee trustee concerned.*
 - (c) *Transferee trustee: For election to have the benefits transferred to another master trust scheme or industry scheme elected by the scheme member.*
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SECTION I - DETAILS OF THE SCHEME MEMBER

(1) Name of the scheme member: _____

(2) Hong Kong Identity (HKID)
Card/Passport* number ^{Note 3} of the scheme
member: _____

(3) Correspondence address

Flat/Room	Floor	Block	Name of building
Street no.		Name of street	
			* Hong Kong/Kowloon/N.T.
Name of district			

(4) (a) Telephone no.: _____
(b) Mobile/Pager no.: _____

(5) Facsimile no.: _____

SECTION II - FUND TRANSFER INFORMATION

(1) Details of the account from which accrued benefits derived from mandatory contributions are to be transferred

Name of the trustee: _____

Name of the scheme: _____

Scheme member's account number: _____

SECTION III - FUND TRANSFER OPTIONS(1) Fund transfer options ^{Note 4:}

I elect to have the accrued benefits derived from mandatory contributions in my account stated in Section II (1) above transferred as follows: *(please ✓ the appropriate box)*

- (a) To my account with my new employer

Name of new employer: _____

New employer's participation number ^{Note 5:} _____

Name of the trustee: _____

Name of the scheme: _____

Scheme member's account number ^{Note 6:} _____

- (b) To my existing/a new* account in a master trust scheme/industry scheme*

Name of the trustee: _____

Name of the scheme: _____

Scheme member's account number ^{Note 6:} _____

- (c) Retained in the current scheme (NOT applicable to employer sponsored schemes)

(2) Are there any voluntary contributions? *(please ✓ the appropriate box)*

Yes

No *(please skip item (3) below)*

(3) I elect to have the accrued benefits derived from voluntary contributions: *(please ✓ the appropriate box)*

(a) handled in the same way as those derived from mandatory contributions

(b) withdrawn in accordance with the governing rules of the scheme

Method of payment:

- (i) by cheque
- (ii) by depositing directly in my bank account

(applicable only to trustees who provide such services)

Name of Bank: _____

Account Number: _____

- (4) I hereby attach a photocopy of my HKID card for verification of the identity card number so that I do not need to present my HKID card in person for verification

SECTION IV - DECLARATION

I declare that to the best of my knowledge and belief, the information given in this Form/and its attachment* is correct and complete. †

[Signature of the scheme member]

Date

† **Warning :** Section 43E of the Ordinance makes it an offence punishable with a maximum of 1 year's imprisonment for the first occasion and 2 years' imprisonment on each subsequent occasion for a person who makes a false or misleading statement in a material respect.

***Explanatory Notes on
Scheme Member's Request For Fund Transfer Form (Form MPF(S) - P(M))***

- (1) (a) This form should be used when a scheme member wishes to transfer his/her accrued benefits:
 - (i) From an MPF registered scheme to another MPF registered scheme; or
 - (ii) from an account in an MPF registered scheme to another account in the same scheme.
 - (b) For ease of processing, a scheme member is required to fill in a separate Form MPF(S) - P(M) for each account from which funds are to be transferred.
 - (c) For each account, a scheme member should transfer the entirety of his/her accrued benefits therein in a lump sum.
- (2) Definition of terms:
- (a) "Contribution account" - an account into which mandatory contributions and/or voluntary contributions are paid in respect of a current employment or current self-employment.
 - (b) "Preserved account" - an account in which accrued benefits in respect of any former employment or former self-employment of a scheme member are held.
 - (c) "Former employee" - an employee who has just ceased his/her employment.
 - (d) "Former self-employed person" - a person who has just ceased self-employment.
 - (e) "A transferor trustee" - the trustee of a scheme from which the accrued benefits of a member are to be transferred in accordance with the member's election, whether to another registered scheme or to another account within the same scheme.
 - (f) "A transferee trustee" - the trustee of a scheme to which the accrued benefits of a member are to be transferred in accordance with the member's election.
- (3) Scheme members should give their passport numbers ONLY when they do NOT possess HKID cards.
- (4) Different types of account holders have different transfer options. An applicant may check the list below to see the transfer options available to him/her:

I. CONTRIBUTION ACCOUNTS**A. Transfer options for a contribution account holder who is a FORMER EMPLOYEE**

- (1) For a contribution account in an employer sponsored scheme, the former employee may elect to transfer to:
 - (a) an account in a master trust scheme nominated by himself/herself; **or**
 - (b) an existing account of the former employee in an industry scheme; **or**
 - (c) **(if the former employee is subsequently employed by a new employer,) the contribution account of the scheme in which the new employer is participating in relation to him/her. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.**

- (2) For a contribution account in a master trust scheme, the former employee may elect to transfer to:
 - (a) another account in the same scheme (i.e. retained in the current scheme); **or**
 - (b) an account in another master trust scheme nominated by himself/herself; **or**
 - (c) an existing account of the former employee in an industry scheme; **or**
 - (d) **(if the former employee is subsequently employed by a new employer,) the contribution account of the scheme in which the new employer is participating in relation to him/her. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.**

- (3) For a contribution account in an industry scheme, the former employee may elect to transfer to:
 - (a) an account in a master trust scheme nominated by himself/herself; **or**
 - (b) an existing account of the former employee in another industry scheme; **or**
 - (c) **(if the former employee is subsequently employed by a new employer,) the contribution account of the scheme in which the new employer is participating in relation to him/her. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.**

If the former employee wishes to retain his/her accrued benefits in the industry scheme, he/she does not need to fill in this Form for transfer.

B. Transfer options for a contribution account holder who is a SELF-EMPLOYED PERSON OR FORMER SELF-EMPLOYED PERSON

- (1) For a contribution account in a master trust scheme, the self-employed person or former self-employed person may elect to transfer to:
- (a) an account in another master trust scheme nominated by himself/herself; **or**
 - (b) an existing account of the person in an industry scheme; **or**
 - (c) an account in an industry scheme to which the person is eligible to belong; **or**
 - (d) **(if the person is a former self-employed person and is subsequently employed by a new employer,) the contribution account of the scheme in which the new employer is participating in relation to the person. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.**
- (2) For a contribution account in an industry scheme, the self-employed person or former self-employed person may elect to transfer to :
- (a) an account in a master trust scheme nominated by himself/herself; **or**
 - (b) an existing account of the person in another industry scheme; **or**
 - (c) an account in another industry scheme to which the person is eligible to belong; **or**
 - (d) **(if the person is a former self-employed person and is subsequently employed by a new employer,) the contribution account of the scheme in which the new employer is participating in relation to the person. However, once the accrued benefits are transferred into the contribution account, the benefits cannot be transferred again until cessation of employment with the new employer.**

II. PRESERVED ACCOUNTS

Any member of a master trust scheme or an industry scheme may elect to have the accrued benefits held in a preserved account of the member in the scheme transferred to another scheme to which the member is eligible to belong by giving this Form to the transferee trustee concerned.

- (5) The participation number is the number printed on the participation certificate issued by the MPFA to the participating employer.
- (6) Leave it blank if a member has newly joined the scheme and is not aware of the account number for his/her new account.