

FORM MPF(S) - W

MANDATORY PROVIDENT FUND SCHEMES ORDINANCE (CAP. 485)
(“the Ordinance”)

CLAIM FORM FOR PAYMENT OF ACCRUED BENEFITS

NOTES:

- (1) *This Form is to be completed by any person who wishes to claim for payment of accrued benefits.*
 - (2) *Please use BLOCK LETTERS for completion of this Form.*
 - (3) *Please read the explanatory notes carefully before completing this Form.*
 - (4) ** means delete whichever is inappropriate.*
 - (5) *Please insert “N.A.” if not applicable.*
 - (6) *The information and data given in this Form can be used by the approved trustee concerned and the Mandatory Provident Fund Schemes Authority (“the Authority”) in activities relating to the processing of the claim and may be disclosed to other parties for such purposes.*
 - (7) *All the forms related to claims for payment of accrued benefits (i.e. Form MPF(S) - W(M), MPF(S) - W(SD1), MPF(S) - W(SD2), MPF(S) - W(SD3), MPF(S) - W(SD4) and MPF(S) - W(SD5)) can be downloaded from the internet at the Authority’s web site at [<http://www.mpfa.org.hk>]. Hard copies of the forms are also available at the office of the Authority. If necessary, you may seek assistance from the approved trustee of your scheme or the Authority.*
 - (8) *Upon completion of this Form, the claimant/scheme member should give this Form to the approved trustee of the scheme concerned.*
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SECTION I - DETAILS OF THE CLAIMANT^{Note 1}/SCHEME MEMBER**(1) Claimant**

(i) Name: _____

(ii) Hong Kong Identity (HKID)
Card/Passport* number^{Note 2}: _____

(iii) Correspondence address

Flat/Room	Floor	Block	Name of building

Street no.	Name of street

	* <i>Hong Kong/Kowloon/N.T.</i>
Name of district	

(iv) (a) Telephone no.: _____

(b) Mobile/Pager no.: _____

(v) Facsimile no.: _____

(2) Scheme member (if different from claimant)

(i) Name: _____

(ii) Hong Kong Identity (HKID)
Card/Passport* number^{Note 2}: _____

SECTION II - DETAILS OF THE CLAIM

(1) Name of the scheme and account number(s) against which payment(s) are claimed ^{Note 3}

Name of the scheme: _____

Name of the trustee: _____

Account number(s): (1) _____

(2) _____

(3) _____

(2) Grounds for claiming accrued benefits: *(please ✓ one box)*

- Retirement (i.e. scheme member reaches the retirement age of 65)
- Early retirement (i.e. scheme member reaches the age of 60 and has permanently ceased all employments/self-employment)
- Total incapacity
- Death
- Permanent departure from Hong Kong
- Small balance account

(3) Method of payment *(please ✓ the appropriate box):*

(i) by cheque

(ii) by depositing directly into my bank account*

or
by depositing directly into the bank account of the scheme member (if the claim is lodged by a committee/guardian on behalf of the scheme member)*

(applicable only to trustees who provide such services and charges may be imposed for the transaction)

Name of bank: _____

Account number: _____

SECTION III - DOCUMENTS ENCLOSED

The following documents are enclosed by the claimant(s) in respect of the claim for payment on grounds of *(Please ✓ the appropriate box)*^{Note 4}:

(A) Retirement

- a copy of your HKID card for verification of your identity card number if you do not wish to present the card in person for verification^{Note 8}

(B) Early Retirement

- a copy of your HKID card for verification of your identity card number if you do not wish to present the card in person for verification^{Note 8}
- the original copy of the statutory declaration form on early retirement (Form MPF(S) - W(SD1))^{Note 5}

(C) Total Incapacity

- a copy of your HKID card (if the claim is made by the scheme member), or a copy each of the scheme member's and the committee/guardian's HKID cards (if the claim is made by the committee/guardian on behalf of the scheme member) for verification of identity card number(s) if you do not wish to present the card in person for verification^{Note 8}
- a copy of the medical certificate certifying total incapacity (Form MPF(S) - W(M))^{Note 6}
- a copy of the letter from the employer (if employed as an employee immediately before total incapacity) or the last employer (if employment as an employee has been terminated before total incapacitation) certifying that the contract of employment for that particular kind of work has been or will be terminated^{Note 7}
- the original copy of the statutory declaration form on total incapacity (Form MPF(S) - W(SD4) if the claim is made by the scheme member, or Form MPF(S) - W(SD5) if the claim is made by a committee/guardian on behalf of the scheme member)^{Notes 5 & 9}
- a copy of the evidence of the status of the committee/guardian, i.e. the Court Order or the Guardianship Order issued by the Guardianship Board pursuant to the Mental Health Ordinance (Cap. 136) (if the claim is made by a committee/guardian on behalf of the scheme member)

(D) Death

- a copy of your HKID card for verification of your identity card number if you do not wish to present the card in person for verification^{Note 8}
- a copy of the death certificate of the deceased scheme member
- a copy of the Letter of Probate or Letter of Administration granted by the Probate Registry or a letter requesting withdrawal of the accrued benefits issued by the Official Administrator if the claim is made by the Official Administrator*

(E) Permanent Departure from Hong Kong

- a copy of your HKID card for verification of your identity card number if you do not wish to present the card in person for verification ^{Note 8}
- a copy of the immigration visa/foreign passport/Home Visit Permit/Entry Permit for Hong Kong and Macau Residents ^{Note 10}/others *, etc. _____ (please specify type of other documents) giving the member the permission to reside permanently or for an indefinite period in a place outside Hong Kong
- the original copy of the statutory declaration form on permanent departure (Form MPF(S) – W(SD2)) ^{Note 5}
- a copy of the Letter of Release issued by the Inland Revenue Department, if applicable
- Information on overseas settlement
- (i) Country where you are permitted to reside permanently or for an indefinite period: _____
- (ii) Overseas contact details:
- Address: _____

- Telephone no.: _____ Fax no.: _____
- E-mail address: _____
- (iii) Reason(s) for permanently departing from Hong Kong (e.g. emigration, marriage, family reunion, long-term overseas employment, retirement or others. For others, please specify)
- _____

(F) Small Balance Account

- a copy of your HKID card for verification of your identity card number if you do not wish to present the card in person for verification ^{Note 8}
- the original copy of the statutory declaration form on small balance account (Form MPF(S) – W(SD3)) ^{Note 5}

SECTION IV – DECLARATION

I / We* ^{Note 1} declare that to the best of my/our * knowledge and belief, the information given in this Form and its attachments is correct and complete. ✦

 [Signature of the claimant(s)]

 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
Claim Form For Payment of Accrued Benefits (Form MPF(S) – W)***

- (1) For claims of payment on grounds of death, only personal representatives within the meaning of the Mandatory Provident Fund Schemes Ordinance may act on behalf of the deceased scheme member to claim for payment of the member's accrued benefits. This includes a personal representative within the meaning of the Probate and Administration Ordinance (Cap.10) and the Official Administrator who gets in and administers an estate of a deceased scheme member in a summary manner without a grant or other legal formality under section 15 of that Ordinance. If there is more than one personal representative and the personal representatives have not authorized one of the representatives to act on behalf of other representatives to lodge the claim, all the personal representatives should submit the Claim Form jointly. Please use additional blank sheet to provide details of the claimants under Section I. Under such circumstances, this Form needs to be signed by all of the personal representatives. For claims of payment on grounds of total incapacity, either the member or a committee of estate/guardian appointed under the Mental Health Ordinance (Cap. 136) to act on behalf of the member may lodge the claim for payment of accrued benefits.
- (2) Claimants/scheme members should give their passport numbers ONLY when they do NOT possess HKID cards.
- (3) If a claimant/scheme member has more than one account in a registered scheme, the claimant should fill in one form for payment of accrued benefits in respect of all accounts within one scheme. If a claimant/scheme member has accounts in more than one scheme, the claimant should fill in one form for each scheme.
- (4) In processing a claim of payment, the approved trustee of the scheme may request the claimant to produce the original copies of the documents for checking purpose, if necessary.
- (5) A claimant who is required to make a statutory declaration for a claim shall complete the relevant statutory declaration form and make a statutory declaration. The signed statutory declaration form shall be attached to the Form MPF(S) – W. The statutory declaration must be a valid statutory declaration in the place where the declaration is made (e.g. in Hong Kong, the statutory declaration should be made before and signed by a Commissioner for Oaths at a Public Enquiry Service Centre of the Home Affairs Department/a Notary Public/a Justice of the Peace). A statutory declaration made in a place other than Hong Kong is also acceptable provided that it is made before and signed by a Notary Public or a person authorized under the law of that place to administer an oath or take a statutory declaration.
- (6) Except for a claimant who also claims long service payment on grounds of permanent unfit for his/her present job under the Employment Ordinance (Cap. 57), a claimant shall ask his/her medical practitioner to fill in the Form MPF(S) – W(M) and attach it to the Form MPF(S) – W. A medical practitioner who signs the Form MPF(S) – W(M) must be *either*
 - (I) a registered medical practitioner who is registered under the Medical Registration

Ordinance (Cap. 161), i.e.,

- (a) a person who is duly registered as a medical practitioner with the Medical Council of Hong Kong; or
- (b) a person who is deemed to be registered as a medical practitioner under the Medical Registration Ordinance (i.e. persons who are exempted from registration);

or

(II) a registered Chinese medicine practitioner, within the meaning assigned to it by section 2 of the Chinese Medicine Ordinance (Cap. 549).

For a claimant who also claims long service payment on grounds of permanent unfitness for his/her present job, he/she may use the form “Certificate of an employee’s permanent unfitness for a particular type of work” under the Employment Ordinance used for the purpose to substitute for the Form MPF(S) – W(M) for the purpose of claiming payment of MPF accrued benefits on grounds of total incapacity.

- (7) For a self-employed person or a former self-employed person who claims payment on grounds of total incapacity, there is no need to produce an employer letter.
- (8) For a claimant/scheme member who does NOT possess a HKID card, a copy of the passport (only pages with personal particulars and passport number) should be given to the trustee concerned for verification of the passport number if the claimant/scheme member does not wish to present the passport in person for verification.
- (9) For a former employee whose last employment has been terminated before total incapacity and who is unable to obtain a letter from the last employer certifying that the contract of employment for that particular kind of work has been terminated or has been unemployed for more than 7 years, the claimant must provide the trustee with a statutory declaration stating that that contract of employment for the particular kind of work as specified in the medical certificate has been terminated.
- (10) The “Entry Permit for Hong Kong and Macau Residents (港澳居民來往內地通行證)” is issued at the China Travel Service (Hong Kong) Limited on behalf of the Public Security Bureau of Guangdong, PRC.