

How to fill in the "Scheme Member's Request for Account Consolidation Form"

(Form MPF(S)-P(C))

Please follow the steps below to fill in the form:

1 Section I of this form: fill in your personal details.

2 Appendix of this form: elect the personal accounts that you will consolidate, and fill in the scheme member account numbers.
(All the trustees that provide MPF schemes in the market, and the names of these schemes, are listed in the Appendix)

Scheme Member Account Number
You can obtain it by:

- Checking your benefit statement; or
- Enquiring with your trustee.

3 Section II of this form: elect a scheme of your own choice, and fill in the relevant details.

A scheme of your own choice may be any MPF scheme available in the market, including an MPF scheme of your current employment.

Name of Your Elected Scheme
Elect a scheme of your own choice. The personal accounts you elected in the Appendix will be consolidated into this scheme.
(All the trustees that provide MPF schemes in the market, and the names of these schemes, are listed in the Appendix)

Account Type

- Personal account**
 - One of the personal accounts that you will consolidate (i.e. a personal account that you already hold); or
 - A new personal account opened under another trustee and scheme available in the market (i.e. you do not currently hold a personal account under this trustee and scheme, so please contact the trustee to open an account and select an investment portfolio).
- Contribution account**
 - Your contribution account under the MPF scheme of your current employment.

If you elect a contribution account of your current employment, you will need to fill in the **employer identification number**. You can obtain it by:

- Checking your benefit statement; or
- Enquiring with your employer or trustee.

Scheme Member Account Number
You may refer to the methods mentioned in **2** above to obtain your scheme member account number. You may leave the scheme member account number blank if you have just completed the enrolment procedures and have not yet been notified of your scheme member account number under the scheme.

4 Section III of this form: remember to read carefully the authorization and declaration statements before signing this form.

Your signature specimen on this form should be identical with the specimen of your signature held in the records of the trustees of the personal accounts that you have elected in the Appendix. If you have any enquiries, please contact the relevant trustee(s).

Please remember: your request for consolidation may be delayed, or even not be processed by the trustees, if you provide incorrect or incomplete information.

Sample

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Annex C to IV.3

Please use BLOCK LETTERS to complete this Form.

FORM MPF(S) - P(C)

SCHEME MEMBER'S REQUEST FOR ACCOUNT CONSOLIDATION FORM (for consolidating multiple personal accounts into one account)

Section 149 of the Mandatory Provident Fund Schemes (General) Regulation (Cap. 485A)

SECTION I. SCHEME MEMBER DETAILS				
Name ¹ (as shown on your Hong Kong Identity (HKID) Card)	Surname: Chan		1	
	Other Name: Tai Man			
Identification	HKID Card No.: N123456(7)			
	Passport No.: (ONLY for member without HKID Card)			
Contact Details	Daytime Phone: 2012 3456	Mobile Phone: 5222 2222		
	Email Address (if any): xxx.xx@yyy.com.hk			
Correspondence Address	A	8	3	Lucky Tower Building
	Flat/Room	Floor	Block	
	Estate: Sheung Wan		2	Happy Road Street
District / Country (if not Hong Kong)		Hong Kong / Kowloon / New Territories (delete whichever is inappropriate)		

SECTION II. MY ELECTED SCHEME	
I elect to transfer all accrued benefits from my personal accounts indicated in the Appendix to my elected scheme ² :	
Name of My Elected Scheme	xxxxx Scheme 3
Account Type (Select one only and ✓ as appropriate)	<input checked="" type="checkbox"/> Personal account OR <input type="checkbox"/> Contribution account (Employer Identification No. ³)
Scheme Member Account No. ⁴	111-111111-123

SECTION III. AUTHORIZATION AND DECLARATION	
(a) I hereby give consent to the trustee of my elected scheme to disclose information collected in this Form and the Appendix to the trustee(s) concerned, the relevant service provider(s) and other appropriate parties including the MPFA, or to enable such party or parties to access or disclose relevant information for the purposes of processing the transfer of my accrued benefits.	
(b) I hereby give the trustees indicated in the Appendix an instruction to terminate my relevant personal accounts as referred to in the Appendix upon transfer of the full accrued benefits to my elected scheme and there is no residual balance in the said accounts.	
(c) I declare that I have read the notes on the first page of this Form and the information given in this Form and the Appendix is correct and complete.	

Signature ⁵ Chan Tai Man	4	Date (DD/MM/YYYY) 8/9/2013
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Sample

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Annex C to IV.3

APPENDIX. LIST OF MY PERSONAL ACCOUNTS FOR CONSOLIDATION

Please indicate the personal accounts you elect to consolidate by filling in the Scheme Member Account No.⁵:

Trustee Name	Scheme Name	Scheme Member Account No.
AIA Company (Trustee) Limited	AIA MPF - Basic Value Choice	
	AIA MPF - Prime Value Choice	
	AIA MPF - Simple Value Choice	
AXA China Region Trustees Limited	AXA MPF - Smart Plan	
	AXA MPF - Simple Plan	
Bank Consortium Trust Company Limited	BCT (MPF) Industry Choice	
	BCT (MPF) Pro Choice	
	Allianz Global Investors MPF Plan	
	Invesco Strategic MPF Scheme	
Bank of Communications Trustee Limited	AMTD MPF Scheme	
	BCOM Joyful Retirement MPF Scheme	
Bank of East Asia (Trustees) Limited	BEA (MPF) Industry Scheme	
	BEA (MPF) Master Trust Scheme	
BOCI-Prudential Trustee Limited	BEA (MPF) Value Scheme	
	BOCI-Prudential Easy-Choice Mandatory Provident Fund Scheme	
China Life Trustees Limited	My Choice Mandatory Provident Fund Scheme	
	China Life MPF Master Trust Scheme	
FWD Pension Trust Limited	FWD MPF Master Trust Basic Scheme	
	FWD MPF Master Trust Comprehensive Scheme	
HSBC Institutional Trust Services (Asia) Limited	Fidelity Retirement Master Trust	
	Haitong MPF Retirement Fund	
HSBC Provident Fund Trustee (Hong Kong) Limited	Hang Seng Mandatory Provident Fund - SimpleChoice	
	Hang Seng Mandatory Provident Fund - SuperTrust	
	Hang Seng Mandatory Provident Fund - SuperTrust Plus	
	Hang Seng Mandatory Provident Fund - ValueChoice	
	HSBC Mandatory Provident Fund - SimpleChoice	
	HSBC Mandatory Provident Fund - SuperTrust	
	HSBC Mandatory Provident Fund - SuperTrust Plus	
	HSBC Mandatory Provident Fund - ValueChoice	
Schroder MPF Master Trust		
Manulife Provident Funds Trust Company Limited	Manu-Lifestyle (MPF) Scheme	
	Manulife Global Select (MPF) Scheme	
MassMutual Trustees Limited	MASS Mandatory Provident Fund Scheme	
	Principal MPF Scheme Series 500	
	Principal MPF Scheme Series 600	
Principal Trust Company (Asia) Limited	Principal MPF Scheme Series 800	
RBC Investor Services Trust Hong Kong Limited	Standard Chartered MPF Plan - Advanced	
	Standard Chartered MPF Plan - Basic	
Sun Life Trustee Company Limited	Sun Life Rainbow MPF Scheme	

Remember to fill in the scheme member account numbers of the personal accounts that will be consolidated. If the numbers are incorrect or incomplete, those accounts will not be consolidated.