

FORM MMB - W

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

**CLAIM FORM FOR WITHDRAWAL OF MINIMUM MPF BENEFITS FROM MPF
EXEMPTED ORSO REGISTERED SCHEME**

NOTES:

- (1) *This Form is to be completed by any person who wishes to claim for withdrawal of minimum MPF benefits from an MPF exempted ORSO registered scheme.*
- (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 not applicable.*
- (5) *Please insert “N.A.” if not applicable.*
- (6) *The information and data to be supplied in support of this claim for withdrawal of minimum MPF benefits are to be used for processing your claim. The information and data you supply may, for such purpose, be transferred to the relevant service provider(s) and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority (“the Authority”).*
- (7) *All the forms related to withdrawal of minimum MPF benefits (i.e. Form MMB - W(M), MMB - W(SD1), MMB - W(SD2), MMB - W(SD3) and MMB - W(T)) can be downloaded from the Authority’s website at www.mpfa.org.hk. Hard copies of the forms are also available at the office of the Authority. If necessary, please seek assistance from the trustee of the scheme concerned or the Authority (hotline: 2918 0102 or email: mpfa@mpfa.org.hk).*
- (8) *Upon completion of this Form, the claimant/scheme member should give this Form to the trustee of the scheme concerned.*

Reminder to Members

- *Withdrawal of benefits out of a guaranteed fund may result in some or all of the guarantee conditions not being satisfied; thus affecting the entitlement to the guarantee. Please check the constituting document of the scheme or consult the relevant trustee for details.*
- *The price of fund units may change due to market fluctuations and may go down as well as up. The price of fund units on the date when you submit a claim form to the trustee may be different from that on the date when the fund units are redeemed.*

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 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 MPF exempted ORSO registered scheme

Name of the scheme: _____

Name of the trustee: _____

(2) Ground for claiming minimum MPF benefits (*please ✓ one box*):

- Retirement (i.e. scheme member reaches the retirement age of 65)^{Note 3}
- Early retirement (i.e. scheme member reaches the age of 60 and has permanently ceased all employment and self-employment with no intention of becoming employed or self-employed again)^{Note 3}
- Total incapacity
- Terminal illness^{Note 4}
- Death
- Permanent departure from Hong Kong

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

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

(applicable only to trustees who provide such services and charges, such as currency conversion fee or other bank charges, may be imposed for the transaction)

Account number: _____

Name of bank
account holder: _____

Name of bank: _____

Address of bank[#]: _____

Swift code[#]: _____

Currency[#]: _____

[#] *applicable only to an overseas bank*

SECTION III – DOCUMENTS ENCLOSED

The following documents are enclosed by the claimant(s) in respect of the claim for withdrawal of minimum MPF benefits from an MPF exempted ORSO registered scheme on the ground of *(Please ✓ the appropriate box)* ^{Notes 5, 6} :

(A) Retirement

- a copy of the scheme member's HKID card for verification of the name, date of birth and identity card number of the scheme member if the claimant does not wish to present the card in person for verification ^{Note 7}
- evidence showing the scheme member's date of birth only in cases where the HKID card does not contain the month and/or day of birth ^{Note 3}
 - a copy of the scheme member's passport or other travel document showing the month and/or day of birth; or
 - the original statutory declaration of the scheme member's date of birth ^{Note 8}; or
 - a copy of the scheme member's HKID card with the day and month of the issue date of the HKID card circled or by other means to indicate that the scheme member wishes to use the day and month of the issue date of the HKID card as the day and month of birth

(B) Early Retirement

- a copy of the scheme member's HKID card for verification of the name, date of birth and identity card number of the scheme member if the claimant does not wish to present the card in person for verification ^{Note 7}
- evidence showing the scheme member's date of birth only in cases where the HKID card does not contain the month and/or day of birth ^{Note 3}
 - a copy of the scheme member's passport or other travel document showing the month and/or day of birth; or
 - the original statutory declaration of the scheme member's date of birth ^{Note 8}; or
 - a copy of the scheme member's HKID card with the day and month of the issue date of the HKID card circled or by other means to indicate that the scheme member wishes to use the day and month of the issue date of the HKID card as the day and month of birth
- the original statutory declaration form on early retirement (Form MMB - W(SD1)) ^{Notes 5, 8}

(C) Total Incapacity

- a copy of the scheme member's HKID card for verification of the name and identity card number of the scheme member if the claimant does not wish to present the card in person for verification ^{Note 7}

- a copy of the medical certificate certifying total incapacity (Form MMB - W(M)) ^{Notes 9, 10}
- a copy of the letter from the employer (if any) certifying that the contract of employment for that particular kind of work has been or will be terminated

(D) Terminal Illness

- a copy of the scheme member's HKID card for verification of the name and identity card number of the scheme member if the claimant does not wish to present the card in person for verification ^{Note 7}
- a copy of the medical certificate certifying terminal illness (Form MMB – W(T)) ^{Note 10} dated not earlier than 12 months before the date on which the claim is lodged

(E) Death

- a copy of the claimant's HKID card for verification of the name and identity card number of the claimant if the claimant does not wish to present the card in person for verification ^{Note 7}
- a copy of the Letter of Probate or Letters of Administration granted by the Probate Registry/a letter requesting withdrawal of the benefits issued by the Official Administrator if the claim is made by the Official Administrator*

(F) Permanent Departure from Hong Kong

- a copy of the scheme member's HKID card for verification of the name and identity card number of the scheme member if the claimant does not wish to present the card in person for verification ^{Note 7}
- a copy of the immigration visa/foreign passport/Home Visit Permit/Entry Permit for Hong Kong and Macau Residents ^{Note 11}/others*, etc. _____ (please specify type of other documents) giving the scheme member the permission to reside in a place outside Hong Kong
- the original statutory declaration form on permanent departure (Form MMB - W(SD2)) ^{Notes 5, 8}
- a copy of the Letter of Release issued by the Inland Revenue Department, if applicable
- Information on overseas settlement
 - (i) Country where the scheme member is permitted to reside:

 - (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.)
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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:** Under section 43E of the Ordinance, a person who, in any document given to the Authority or a trustee of an MPF exempted ORSO registered scheme, knowingly or recklessly makes a statement which is false or misleading in a material respect commits an offence and is liable to a maximum penalty of a \$100,000 fine and 1 year's imprisonment on the first conviction and a \$200,000 fine and 2 years' imprisonment on each subsequent conviction. A person who knowingly and wilfully makes a statutory declaration false in a material particular also commits an offence under section 36 of the Crimes Ordinance (Cap. 200) and is liable on conviction to imprisonment for 2 years and to a fine.

***Explanatory Notes on
Claim Form for Withdrawal of Minimum MPF Benefits (Form MMB - W)***

- (1) (i) For a claim made on the ground of death, only a personal representative within the meaning of the Probate and Administration Ordinance (Cap. 10) or any other person specified in the governing rules of the scheme can be the claimant to act on behalf of the deceased scheme member to claim for withdrawal of the scheme member's minimum MPF benefits. If there is more than one personal representative or specified person and the personal representatives or specified persons have not authorized one of them to act on behalf of others to lodge the claim, all the personal representatives or specified persons should submit the Claim Form jointly. Please use an 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 or specified persons.
- (ii) For a claim made on all other grounds, either the scheme member or person(s) appointed as a committee of the estate of a mentally incapacitated person under the Mental Health Ordinance (Cap. 136) ("the committee of the estate") to act on behalf of the scheme member can be the claimant to lodge the claim for payment of minimum MPF benefits. If there is more than one person appointed by the court as the committee of the estate, those persons should apply and sign in the capacity as the committee of the estate in accordance with those terms of appointment and any other requirements contained in the relevant court order. Please use an additional blank sheet to provide details of the claimants under Section I. Under such circumstances, this Form needs to be signed by all the persons appointed by the court as the committee of the estate, unless the Court authorizes otherwise.
- (2) Claimants/scheme members should give their passport numbers ONLY when they do NOT possess HKID cards.
- (3) A scheme member who does not have the month and/or day of birth printed on the HKID card may provide evidence as to the month and/or day by using one of the following methods for the purpose of withdrawal of minimum MPF benefits on the ground of retirement/early retirement:
- (i) using the birth date as shown on an official document (e.g. a travel document or a statutory declaration of the scheme member's date of birth); or
- (ii) using the day and month of the issue date of the HKID card of the scheme member.

If the scheme member has not used either of the two methods above to provide evidence as to the month and day, then in the absence of any other evidence, the trustee should, where the HKID card shows only the year and month of birth (and not the day of birth) use the last day of the month, and where the HKID card shows only the year of birth (and neither the month nor day of birth), use the last day of the year as shown on the HKID card as the birth date of the scheme member.

- (4) For a claim made by a scheme member for payment of minimum MPF benefits from an account on the ground of terminal illness, the scheme member may continue his current employment after he has withdrawn the minimum MPF benefits. In that case, future contributions made by the employer (both employer and employee portions) will continue to be made to that account. If the scheme member wishes to withdraw the minimum MPF benefits derived from future contributions and transfer-in benefits (if any) in that account again, he should lodge another claim for withdrawal of minimum MPF benefits.
- (5) For a claim made by the committee of the estate on behalf of the scheme member, in addition to the required documents in respect of the scheme member, the following documents should be enclosed:
 - (i) a copy of the evidence of the status of the committee of the estate, i.e. court order;
 - (ii) a copy of each claimant's HKID card for verification of the name and identity card number of the claimant if the claimant does not wish to present the card in person for verification ^{Note 7};
 - (iii) the original statutory declaration form made by the committee of the estate for claim for withdrawal of minimum MPF benefits (Form MMB - W(SD3)) ^{Note 8} (if applicable). Where such a statutory declaration has been made and enclosed with the claim, the statutory declaration form (Forms MMB - W(SD1) and MMB - W(SD2)) for claims made on the grounds of early retirement and permanent departure from Hong Kong respectively shall not be required.
- (6) In processing a claim for withdrawal, the trustee of an MPF exempted ORSO registered scheme may request the claimant to produce the original copies of the documents for checking purpose, if necessary.
- (7) 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 name and passport number of the claimant/scheme member if the claimant/scheme member does not wish to present the passport in person for verification.
- (8) 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 (e.g. at a Public Enquiry Service Centre of the Home Affairs Department) or a Notary Public or 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.

- (9) For a claim made on the ground of total incapacity, except for a claimant who also claims long service payment on the ground of permanent unfitness for his present job under the Employment Ordinance (Cap. 57), a claimant shall ask a medical practitioner to fill in Form MMB - W(M) and attach it to Form MMB - W.

For a claimant who also claims long service payment on the ground of permanent unfitness for his present job under the Employment Ordinance (Cap. 57), the claimant may use the form “Certificate of an employee’s permanent unfitness for a particular type of work” under that Ordinance to substitute for the Form MMB - W(M) for the purpose of claiming withdrawal of minimum MPF benefits on the ground of total incapacity.

- (10) A medical certificate certifying total incapacity (Form MMB - W(M)) or terminal illness (Form MMB - W(T)) shall be signed by a medical practitioner who 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 (Cap. 161) (i.e. persons who are exempted from registration);
 - or*
 - (ii) a registered Chinese medicine practitioner, within the meaning assigned to it by section 2(1) of the Chinese Medicine Ordinance (Cap. 549).
- (11) 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.