

To 致: Bank Consortium Trust Co. Ltd. 銀聯信託有限公司  
c/o oOo Securities (HK) Group Limited (formerly known as orientiert XYZ Securities Limited)

FORM: IU (MEM) – VC (TCM)

奧翱驚集團(香港)證券有限公司 (前稱orientiert XYZ Securities Limited)  
Room 3301, Tower One, Lippo Centre, Hong Kong 香港金鐘道89號力寶中心1座33樓3301室  
Fax 傳真: (852) 2172 0999 AMTD MPF Hotline AMTD 強積金熱線: (852) 2172 0909 Website 網址: www.oogroup.xyz

## AMTD MPF Scheme – Change of Voluntary Contributions Form (For Scheme Member) AMTD 強積金計劃 – 更改自願性供款表格 (計劃成員適用)

### Note 注意

- Please mark “✓” in the appropriate box. 請於適用的方格內填上“✓”號。
- Please countersign any alterations made in this form. 如須作出任何刪改, 請於刪改之位置旁簽署。

Part I. Member Details 成員資料		
Name of Plan 計劃名稱	AMTD MPF Scheme AMTD 強積金計劃	Participating Plan No. 參與計劃編號
Name of Member 成員姓名	English (Mr / Ms / Mrs*)  中文 (先生 / 女士 / 太太*)	Membership No. 成員編號
Contact Phone Number 聯絡電話號碼		HKID Card No. 香港身份證號碼
E-mail Address 電郵地址		Passport No. (ONLY for member without HKID Card) 護照號碼 (本欄僅供沒有香港身份證的成員填寫)

Part II. Change of Voluntary Contributions 更改自願性供款	
Items 類別	Updated Information 最新資料
<b>Regular Employee 一般僱員:</b> Basis of Voluntary Contribution# (Basis of voluntary contribution of employer and employee must be the same) 自願性供款基準# (僱主及僱員之自願性供款基準必須相同) <input type="checkbox"/> Addition 新增 <input type="checkbox"/> Change 更改 <input type="checkbox"/> Deletion 取消 Effective Date: ____ / ____ / ____ 生效日期 D 日 / M 月 / Y 年	<input type="checkbox"/> <b>A. With voluntary contribution from employer 僱主為僱員作出自願性供款:</b> A fixed percentage of ____ % of the same basis of employer voluntary contribution 與僱主自願性供款基準相同之固定百分比 ____ % <input type="checkbox"/> <b>B. No voluntary contribution from employer 僱主沒有為僱員作出自願性供款:</b> <input type="checkbox"/> ____ % x Monthly Basic Salary, or 供款率 x 每月基本入息, 或 <input type="checkbox"/> ____ % x Monthly MPF Relevant Income 供款率 x 每月強積金有關入息 To effect the above changes, a copy of this form <b>MUST</b> be provided to your employer for proper contribution arrangement. 您必須提供此表格之副本予僱主, 以便僱主能配合上述更改而作出供款安排。
<b>Self-employed Person 自僱人士:</b> Basis of Voluntary Contribution# 自願性供款基準# <input type="checkbox"/> Addition 新增 <input type="checkbox"/> Change 更改 <input type="checkbox"/> Deletion 取消 Effective Date: ____ / ____ / ____ 生效日期 D 日 / M 月 / Y 年	<input type="checkbox"/> ____ % of my MPF Relevant Income 本人強積金有關入息之 ____ % <input type="checkbox"/> An amount of HK\$ ____ contributed monthly / annually * (The basis of voluntary contribution should be the same as the basis of Mandatory Contribution selected.) 每月 / 年* ____ 港元 (自願性供款基準應與已選之強制性供款基準相同。*)
<input type="checkbox"/> Others 其他 _____	

\* 請刪去不適用者

**Important Notes 重要提示**

# Scheme members may change basis of voluntary contributions by giving a one month prior notice in writing. Effective date should be the first day of the contribution period.

計劃成員可以更改自願性供款基準且須於一個月前以書面通知。生效日期須為供款期之第一日。

▲ For the investment mandate of Mandatory Contribution Account and Voluntary Contribution Account, if you want to know the latest Investment Allocation Percentage of your Mandatory Contribution Account and Voluntary Contribution Account, please visit our website : [www.oogroup.xyz](http://www.oogroup.xyz) or call our AMTD MPF Hotline at 21720909 for information. 有關強制性供款戶口及自願性供款戶口的投資委託，如您想知道您的強制性供款戶口及自願性供款戶口內的最新投資分配百分比，請瀏覽我們的網站：[www.oogroup.xyz](http://www.oogroup.xyz) 或致電我們的 AMTD 強積金熱線 2172 0909。

If you want to change your Investment Mandate of your Mandatory Contribution Account and Voluntary Contribution Account, please perform it through our website, or by filling in and submitting the “Asset Switch / Change of Investment Mandate Form” [FORM : IM (MEM) – TCM]. If you have never provided the Investment Mandate of your Mandatory Contribution Account and Voluntary Contribution Account since your enrolment to the MPF Account and setting up a Voluntary Contribution Account on or after 1 April 2017, all future contributions or transfer-in asset to the Mandatory Contribution Account and Voluntary Contribution Account will be 100% invested into the Default Investment Strategy [“DIS”]. The DIS is not a fund; it is a strategy that uses two funds (i.e. AMTD Invesco Core Accumulation Fund and AMTD Invesco Age 65 Plus Fund) to manage investment risk exposure by automatically reducing the exposure to higher risk assets and correspondingly increasing the exposure to lower risk assets as you approach your retirement age. The de-risking of investment in DIS will be automatically carried out each year on your birthday, when you are at the age from 50 to 64. For your fund choice combination, you are free to choose to invest into the DIS and / or one or more constituent funds (including AMTD Invesco Core Accumulation Fund and AMTD Invesco Age 65 Plus Fund) as standalone investments. For details, you may refer to the information on DIS at [www.oogroup.xyz](http://www.oogroup.xyz).

如您想更改您的強制性供款戶口及自願性供款戶口內的投資委託指示，請透過我們的網站或填寫及遞交「資產轉換 / 更改未來投資選擇表格」[FORM : IM (MEM) - TCM]。如您自 2017 年 4 月 1 日起成員登記及成立自願性供款戶口後，從沒有在強積金戶口提供強制性供款戶口及自願性供款戶口的投資委託，該戶口日後的所有強制性供款及自願性供款或強制性及自願性轉入資產，將 100% 投資於預設投資策略（「預設投資」）。預設投資並不是一個投資基金；而是一個透過利用兩個投資基金（即 AMTD 景順核心累積基金及 AMTD 景順 65 歲後基金）去管理投資風險的策略。它會在您接近退休年齡前自動減持高風險的資產及增持低風險的資產。降低投資於預設投資風險的指示會在您 50 至 64 歲間，每年的生日天執行。於您的基金選擇組合內，您可自由選擇投資於預設投資及 / 或一個或多個成份基金（包括作為單獨投資的 AMTD 景順核心累積基金及 AMTD 景順 65 歲後基金）。詳情可參照於 [www.oogroup.xyz](http://www.oogroup.xyz)。

**Part III. Personal Information Collection Statement 收集個人資料聲明**

The personal data provided by or in respect of Members and Participating Employers of the AMTD MPF Scheme (the “Scheme”) (concerning application records and operational records and / or their dealing / transaction details records) will only be accessed and handled by properly authorised staff of Bank Consortium Trust Company Limited (“BCTC”, the trustee of the Scheme), the sponsor of the Scheme (currently oOo Securities (HK) Group Limited (formerly known as orientiert XYZ Securities Limited) (“orientiert”) and their properly authorised service providers, employees, officers, directors and agents, and auditors of the Scheme, and may be used, disclosed and / or transferred (whether in or outside Hong Kong) to such persons as BCTC or any of its service providers may consider necessary, including governmental authorities and regulators, for any of the following purposes: (i) exercising or performing the functions conferred or imposed by or under or for the purposes of the Mandatory Provident Fund Schemes Ordinance (“Ordinance”); (ii) providing services in respect of Mandatory Provident Fund and the Scheme including the processing, administering, managing, and analysing of their, as the case may be, contributions, accrued benefits and portfolios and direct marketing of Mandatory Provident Fund services; (iii) improving the provision of Mandatory Provident Fund services by BCTC to customers generally (including the facilitation of the provision of Mandatory Provident Fund services to enable the customers of BCTC generally to access Mandatory Provident Fund (or other) account details, for example, through the internet; (iv) compliance with applicable laws and regulations, and court order and / or (v) any other purposes for the exercise or performance of the above mentioned functions. If there is any change in the information provided, BCTC should be notified as soon as practicable. Failure to provide the information requested may result in BCTC being unable to process the instructions. All such information may be retained after Members and Participating Employers ceased to participate in the Scheme.

Members and Participating Employers have a right, without any charge, to request access to and correction of any personal data or to request that personal data about them not be used for direct marketing purposes. Requests can be made in writing to the Data Protection Officer at BCTC, 18/F Cosco Tower, 183 Queen’s Road Central, Hong Kong. Under the Personal Data (Privacy) Ordinance, Members and Participating Employers have the right to obtain a copy of information held about Members and Participating Employers and for which the Members and Participating Employers may be charged a fee.

由 AMTD 強積金計劃（「本計劃」）的成員及參與僱主所提供或相關之個人資料（有關申請及運作記錄）及 / 或他們的買賣 / 交易細節記錄僅供銀聯信託有限公司（「銀聯信託」，本計劃之受託人）、本計劃之保薦人（現為奧翱集團(香港)證券有限公司(前稱orientiert XYZ Securities Limited)（「orientiert」）及它們正式授權之服務供應商、僱員、主任、董事及代理及本計劃之核數師使用及處理，及在銀聯信託或其任何服務供應商認為有需要時，或被使用、披露及 / 或轉移（在香港境內或境外）予個別人士，包括政府機關及監管機構作以下列任何之目的：（一）行使或執行強制性公積金計劃條例（「條例」）下所授予或施加之職能或根據該條例的目的而行使或執行職能；（二）提供強制性公積金及本計劃的服務包括處理、掌管、管理及分析供款、累算權益及投資組合，視乎情況而定，及直銷強制性公積金服務；（三）改善銀聯信託提供予客戶一般之強制性公積金服務（包括協助提供強制性公積金服務以令銀聯信託之客戶可經例如互聯網處理強制性公積金(或其他)戶口資料）；（四）遵守適用之法律及規例及法院命令及 / 或（五）任何以行使或執行上述職能作目的之用途。如所提供資料有所變更，應在可行的情況下儘快通知銀聯信託。未能提供所需資料可能導致銀聯信託不能處理有關指示。於成員及參與僱主停止參與本計劃後，受託人仍可保留上述所有資料。

成員及參與僱主，在不設任何收費下，有權要求查閱或更改任何個人資料或要求個人資料不被用作直銷之用。可以書面聯絡銀聯信託之資料保護主任，香港皇后大道中 183 號中遠大廈 18 樓。根據個人資料(私隱)條例，成員及參與僱主有權在支付費用的情況下，索取一份有關成員及參與僱主的資料副本。

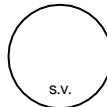
**Part IV. Authorisation, Declaration and Consent 授權、聲明及同意**

By signing this document:

- (1) I understand and agree to the terms of the Personal Information Collection Statement as set out in this form.
- (2) I undertake that if there is any change in the information so provided, I shall notify BCTC and oOo Securities (HK) Group Limited as soon as reasonably practicable.
- (3) I declare that to the best of my knowledge and belief, the information given in this form and / or its attachment(s), if any, is correct and complete.
- (4) I hereby agree to indemnify BCTC against any actions, proceedings, claims, losses, damages, costs or expenses which may be brought against BCTC or suffered or incurred by BCTC arising either directly out of or in connection with BCTC accepting facsimile instructions or e-mail instructions and acting thereon, whether or not the same are confirmed by me in writing. Notwithstanding the above, BCTC has the right to determine which forms or other documents of instructions may or may not be accepted by facsimile or e-mail.
- (5) I expressly consent to the use of my personal data (name, telephone no., fax no., e-mail address, address and account records) for the purpose of direct marketing of Mandatory Provident Fund Services (and ancillary MPF products) by BCTC and BCTF (or their employees or agents); but I understand that BCTC and BCTF cannot make such use of my personal data without my consent and will cease upon my written or verbal request. I further understand that if I do not wish to consent to my personal data being used for the said direct marketing purpose, I should indicate that no consent is given, by ticking this box.  
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經簽署本文件:

- (1) 本人明白及同意於此表格之收集個人資料聲明條款。
- (2) 本人承諾若所提供之資料有任何更改，將儘快通知銀聯信託及奧韜驚集團(香港)證券有限公司。
- (3) 本人聲明，盡本人所知及所信，本表格及隨附之文件(如有)所提供的資料均屬正確無訛且無缺漏。
- (4) 本人同意銀聯信託不論在否得到本人的書面確認下均可接受及處理傳真指示或電郵指示及根據該等指示處理有關事宜，本人亦同意賠償銀聯信託因接受或處理該等傳真指示或電郵指示而直接或間接導致銀聯信託遭受或承受的任何行動、訴訟、理賠、損失、損害、成本或費用。儘管以上所述，銀聯信託有權決定何種表格或其他指示文件能否以傳真方式或電郵方式傳遞。
- (5) 本人即明確表示同意銀聯信託及銀聯金融(及其僱員或代理)使用本人的個人資料(姓名、電話號碼、傳真號碼、電郵地址、地址及戶口記錄)作直銷強制性公積金服務(及有關強積金的產品)的目的，但本人明白倘本人不同意銀聯信託及銀聯金融不能如此使用本人的個人資料及倘接獲本人之書面或口頭要求，該使用將停止。本人亦明白如本人不欲將本人的個人資料用作上述直銷用途，本人應在末段的方格內加上“✓”號，以表示不同意。☐



Signature of Applicant 申請人簽署

Date (D / M / Y) 日期 (日 / 月 / 年)

**Internal Use Only 內部專用**

Date Received:

Input By:

Verified By:

Remarks: