

To 致: The Hongkong and Shanghai Banking Corporation Limited

香港上海滙豐銀行有限公司

PO Box 74203 Kowloon Central Post Office 九龍中央郵政信箱74203號

HSBC Customer Service Hotline 滙豐客戶服務熱線: 2288 6655

INCDER01

Occupational Retirement Schemes

職業退休計劃

Employer Change of Details Form 僱主更改資料表格

- Note 注意: 1. This form is for use by employers for the purpose of notifying us about changes in business name and their details. If the change is due to i) change of relevant employer by way of replacement, or ii) relevant employer joining an existing scheme, please complete 'Wayfoong Multi-Funding system - Scheme and Employer Application Form'. 本表格適用於僱主更改僱主名稱及其資料。如更改是由於 i) 更改有關被替換僱主, 或 ii) 有關僱主參與現有計劃, 請另行填寫「滙豐綜合公積金 - 計劃及僱主申請表」。
2. If you need to add or delete the signature specimen of your authorised person(s), please complete an 'Authorised Signatures Specimen' form. 如你需要新增或終止授權人簽名, 請另行填寫「授權人簽名式樣」表格。
3. Please complete in BLOCK LETTERS and tick ✓ the appropriate box. 請用正楷填寫, 並於適當的方格內加上[✓]號。
4. Please return the completed form and all relevant documents (if any) to The Hongkong and Shanghai Banking Corporation Limited - PO Box 74203 Kowloon Central Post Office. 請把填妥的表格及有關文件(如有)寄交香港上海滙豐銀行有限公司 - 九龍中央郵政信箱74203號。
5. Certified true copies should be certified by any of the following personnel 提交認證副本可經由下列人士核證:
- A certified public accountant/lawyer/banker/notary public acceptable to entities of HSBC Group; or 任何滙豐集團成員認可的執業會計師/律師/往來銀行/公證人; 或
 - A member of Hong Kong Institute of Chartered Secretaries (HKICS); or 任何香港特許秘書公會會員; 或
 - A MPF specialist at HSBC designated branches - You may bring along your HK Permanent ID card/Passport and proof of your residential address and permanent address to any one of HSBC designated branches for verification purpose. For the information about the HSBC designated branches, please visit www.hsbc.com.hk/mpf. 指定滙豐分行強積金職員 - 你可攜同你的香港永久性居民身分證/護照及住宅地址及永久地址證明文件親臨任何一間指定滙豐分行, 以便我們核實你的身分。查詢指定滙豐分行詳情, 請瀏覽www.hsbc.com.hk/mpf。

A. Details of scheme 計劃資料

1. Scheme ID 計劃編號	2. Pay centre ID 付款中心編號	3. Effective date of change 更改生效日期 <table border="1"><tr><td>Year 年</td><td>Month 月</td><td>Day 日</td></tr></table>	Year 年	Month 月	Day 日
Year 年	Month 月	Day 日			
4. Company name of participating employer (in English)* 參與僱主公司名稱(英文)*					

* Please fill in the name notifying us last time. 請填寫對上一次通知我們的名稱。

B. Details of changes required 所需更改資料 (Please complete only those details to be changed. 只需填寫所需更改的資料。)

1. Change of company name 更改公司名稱 Please notify us within 30 days of the change of company name and provide a certified true copy of valid Business Registration Certificate and/or Certificate of Incorporation on Change of Name and/or other relevant registration documents. If the registration type and registration number is changed, a new employer scheme may be required to set up. 請於公司名稱更改後的30天內通知我們, 並請提供有效的商業登記證及/或公司註冊更改名稱證書及/或其他有關的登記證的認證副本。如更改註冊類別及註冊號碼, 可能需要設立新的僱主計劃。 New company name of participating employer 參與僱主的新公司名稱 English name 英文名稱: _____ Chinese name 中文名稱: _____		
2. Business Registration no. 商業登記號碼 (Please provide a certified true copy 請附上認證副本) Registration no. 登記號碼	3. Certificate of Incorporation no. 公司註冊證書號碼 (Please provide a certified true copy 請附上認證副本) Registration no. 登記號碼	4. Other Registration or License no. 其他登記或牌照號碼 (Please provide a certified true copy 請附上認證副本) Registration type [^] 註冊證明 [^] Registration no. 登記號碼

[^] Registration types are listed below 註冊證明類別如下:

IR - Inland Revenue Department (Charitable Organisations) 稅務局(慈善機構)

ED - Education Department 教育署

SO - Society Office of HK Police (Societies) 香港警務處社團事務處(社團)

TU - Registry of Trade Unions 職工會登記局

OT - Others 其他

B. Details of changes required (Cont'd) 所需更改資料(續)

<p>5. Change of trading as name(s) 更改營業名稱 (Please provide a certified true copy of evidence. 請提供證明文件之認證副本。)</p> <p>English name 英文名稱: _____</p> <p>Chinese name 中文名稱: _____</p>	<p>6. Country/Region of registration (in English) 登記國家/地區(英文)</p>				
<p>7. Date of incorporation 註冊日期</p> <p style="text-align: center;"> _____ Year 年 Month 月 Day 日 </p>	<p>8. Country/Region of incorporation (in English) 註冊國家/地區(英文)</p>				
<p>9. Nature of business/industry (the total should be 100%) 業務/行業性質(總和必須為100%)</p> <p>Industry 行業: _____ %</p> <p>Industry 行業: _____ %</p> <p>Industry 行業: _____ %</p>					
<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="text-align: center; padding: 5px;">For office use only 公司專用</td> </tr> <tr> <td style="padding: 5px;">SIC code _____</td> </tr> <tr> <td style="padding: 5px;">_____</td> </tr> <tr> <td style="padding: 5px;">_____</td> </tr> </table>		For office use only 公司專用	SIC code _____	_____	_____
For office use only 公司專用					
SIC code _____					

<p>10. Registered office address (in English) 註冊辦事處地址(英文)</p> <p>_____</p> <p style="text-align: center;">Flat/Room 室 Floor 樓 Block 座 Name of building 大廈名稱</p> <p>_____</p> <p style="text-align: center;">Name of estate 屋邨名稱 Number and name of street/road 門牌及街道名稱</p> <p>_____</p> <p style="text-align: center;">District/Postal code 地區/郵政編號 <input type="checkbox"/> HK 香港 <input type="checkbox"/> KLN 九龍 <input type="checkbox"/> NT 新界 <input type="checkbox"/> Others 其他 City 城市 Country/Region 國家/地區</p>					
<p>11. Business address (in English) 營業地址(英文)</p> <p><input type="checkbox"/> Same as above registered office address 與上述註冊辦事處地址相同</p> <p><input type="checkbox"/> Other address, please specify 其他地址, 請註明</p> <p>_____</p> <p style="text-align: center;">Flat/Room 室 Floor 樓 Block 座 Name of building 大廈名稱</p> <p>_____</p> <p style="text-align: center;">Name of estate 屋邨名稱 Number and name of street/road 門牌及街道名稱</p> <p>_____</p> <p style="text-align: center;">District/Postal code 地區/郵政編號 <input type="checkbox"/> HK 香港 <input type="checkbox"/> KLN 九龍 <input type="checkbox"/> NT 新界 <input type="checkbox"/> Others 其他 City 城市 Country/Region 國家/地區</p>					
<p>12. Postal address (in English) 郵寄地址(英文)</p> <p><input type="checkbox"/> Same as above registered office address 與上述註冊辦事處地址相同</p> <p><input type="checkbox"/> Same as above business address 與上述營業地址相同</p> <p><input type="checkbox"/> Other address, please specify 其他地址, 請註明</p> <p>_____</p> <p style="text-align: center;">Flat/Room 室 Floor 樓 Block 座 Name of building 大廈名稱</p> <p>_____</p> <p style="text-align: center;">Name of estate 屋邨名稱 Number and name of street/road 門牌及街道名稱</p> <p>_____</p> <p style="text-align: center;">District/Postal code 地區/郵政編號 <input type="checkbox"/> HK 香港 <input type="checkbox"/> KLN 九龍 <input type="checkbox"/> NT 新界 <input type="checkbox"/> Others 其他 City 城市 Country/Region 國家/地區</p>					

B. Details of changes required (Cont'd) 所需更改資料(續)

13. Contact person details 聯絡人資料			
a. Name of contact person (please provide surname first) 聯絡人姓名(請先填寫姓氏)		b. Position of contact person 聯絡人職銜	
<input type="checkbox"/> Mr 先生 <input type="checkbox"/> Mrs 太太 <input type="checkbox"/> Miss 小姐 <input type="checkbox"/> Ms 女士			
c. Contact No. 聯絡號碼	Country/Region Code 國家/區域編號	Area Code 地區號碼	Phone No. 電話號碼
Office phone no. 公司電話號碼	<input type="text"/>	<input type="text"/>	<input type="text"/>
Facsimile no. 傳真號碼	<input type="text"/>	<input type="text"/>	<input type="text"/>
d. E-mail address 電郵地址			
14. Others 其他			

C. Personal information collection statement 收集個人資料聲明

(Applicable to schemes regulated by an insurance arrangement 適用於由保險安排所規管的計劃)

- The personal data provided by Participating Employers (if applicable) and/or Members and details of transactions or dealings by such Participating Employers (if applicable) and/or Members from time to time may, to the extent not prohibited by applicable law, be used for one or more of the following purposes:-(i) the administration and/or management of or in connection with the contributions or benefits or accounts in respect of the Participating Employers (if applicable) and/or Members under the HSBC occupational retirement schemes and Hang Seng occupational retirement schemes administered by the HSBC Group; (ii) conducting direct marketing activities of occupational retirement scheme products and/or occupational retirement scheme services by entities of the HSBC Group as described in paragraph 5 below only if your consent is obtained (which includes an indication of no objection); (iii) improving and furthering the provision of occupational retirement scheme products and/or services (including through customer research or surveys) by entities of the HSBC Group; (iv) matching for occupational retirement scheme related purpose with other personal data concerning the relevant Participating Employers (if applicable) and/or Members; and (v) compliance or in accordance with an order of a court, or compliance or in accordance with a law or a requirement made under a law (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information), or compliance or in accordance with any agreement or treaty or any present or future contractual or other commitment with any regulators or government authorities in any jurisdictions, including but not limited to an agreement by one or more entities of the HSBC Group under the provisions of U.S. tax law known as the Foreign Account Tax Compliance Act ('FATCA'), and the guidelines, guidance or requests given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information (collectively, the 'Compliance Obligations'). 不時由參與僱主(如適用)及/或成員所提供的個人資料及該等參與僱主(如適用)及/或成員的交易或事務往來的詳情, 限於不在適用法律禁止之列, 將可被用於以下一項或多項用途: (i) 由滙豐集團管理行政的滙豐職業退休計劃及恒生職業退休計劃下與參與僱主(如適用)及/或成員的供款或權益或戶口有關的行政事宜及/或管理; (ii) 在獲得你的同意下(包括表示不反對), 進行以下第5段所述由滙豐集團成員所提供的職業退休計劃產品及/或職業退休計劃服務的直接有關促銷活動; (iii) 改善及進一步提供由滙豐集團成員所提供的職業退休計劃產品及/或服務(包括透過客戶研究或調查); (iv) 為任何職業退休計劃相關的用途而核對相關參與僱主(如適用)及/或成員的其他個人資料; 及(v) 遵守或按照法庭命令, 或遵守或按照法律或根據法律訂立的規定(例如《稅務條例》及其條文, 包括關於自動交換財務賬戶資料的條文), 或遵守或按照任何與任何司法管轄區的監管機構或政府機關之間達成的協議或條約或任何現在或將來的合同或其他承諾, 包括但不限於與一個或多個滙豐集團成員根據美國名為《外國賬戶稅務合規法案》(「外國賬戶稅務合規法案」)的稅務法律的規定所達成的協議, 及稅務局所提供或發出的指引、指導或要求, 包括關於自動交換財務賬戶資料的指引、指導或要求(統稱為「合規義務」)。
- Failure to provide your information may result in us being unable to process your application or perform the services you request. 如你未能提供資料將可能導致我們未能處理你的申請或提供你所要求的服務。
- Personal data held by us relating to a Participating Employer (if applicable) and/or Member will be kept confidential but, to the extent not prohibited by applicable law, such information may be provided by us or any of our service providers to the following parties for the purposes set out in paragraph 1:-(i) any regulators or government authorities; (ii) any service provider, agent or contractor who provides administrative, telecommunications, computer, payment, data processing, matching, storage, customer research or survey or other services in connection with the operation of our occupational retirement scheme business; (iii) relevant Participating Employers (if applicable); (iv) entities of the HSBC Group. Such information may be transferred to a place outside Hong Kong Special Administrative Region. 由我們持有參與僱主(如適用)及/或成員的個人資料將予保密, 但限於不在適用法律禁止之列, 我們或任何我們的服務供應商可能會將該等資料提供給以下各方作第1段所述的用途: (i) 任何監管機構或政府機關; (ii) 任何提供與營運我們的職業退休計劃業務有關的行政、電訊、電腦、付賬、數據處理、核對、儲存、客戶研究或調查或其他服務的任何服務供應商、代理人或承包商; (iii) 相關的參與僱主(如適用); (iv) 滙豐集團成員。該等資料可能轉移至香港特別行政區以外的地方。
- You have the right to request access to and correction of your personal data held by us. Request should be addressed to: The Data Protection Officer, HSBC Life (International) Limited, PO Box 74203, Kowloon Central Post Office. For enquiries, please contact our Hotline at (852) 2288 6655. 你有權要求查閱及更改由我們持有你的個人資料。如有需要, 可致函九龍中央郵政信箱74203號向滙豐人壽保險(國際)有限公司資料保障主任提出要求。如有查詢, 可致電(852) 2288 6655。

C. Personal information collection statement (Cont'd) 收集個人資料聲明(續)

5. To the extent not prohibited by applicable law, we, entities of the HSBC Group, intend to use your personal data in direct marketing of occupational retirement scheme products and/or occupational retirement scheme services, and we require your consent (which includes an indication of no objection) for that purpose. In this connection, please note that: 限於不在適用法律禁止之列，我們，滙豐集團成員，擬把你的個人資料用於職業退休計劃產品及／或職業退休計劃服務的直接促銷，而我們為該用途須獲得你的同意(包括表示不反對)。就此，請注意：

- (i) your name, contact details, other products and services portfolio information, transaction pattern and behaviour, financial background and demographic data held by us from time to time may be used in direct marketing; and 我們可能把我們不時持有你的姓名、聯絡資料、其他產品及服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷；及
- (ii) the occupational retirement scheme products and/or occupational retirement scheme services offered by entities of the HSBC Group may be marketed. 可用作促銷由滙豐集團成員所提供的職業退休計劃產品及／或職業退休計劃服務。

If you no longer want us to use your personal data in direct marketing activities as described in paragraph 5 above, you may exercise your opt-out right by notifying us. 如你不再希望你的個人資料被用於上述第5段所述的直接促銷活動，你可通知我們，行使你的選擇權拒絕促銷。

Please tick if you do not wish your personal data to be used for purpose of conducting direct marketing activities stated in paragraph 5 above. 如你不希望你的個人資料被用於上述第5段所列明的直接促銷活動，請在方格內填上剔號。

The above represents your present choice whether or not to receive direct marketing contact or information. This replaces any choice communicated by you to us prior to this application. Please note that you can change your marketing preference anytime, by calling us on (852) 2288 6655, to receive our best offers and promotions. 以上代表你目前就是否希望收到直接促銷聯繫或資訊的選擇，並取代你於本申請前向我們傳達的任何選擇。請注意：接收推廣資訊喜好設定可隨時作出變更，致電我們(852) 2288 6655，從而接收我們的精彩優惠及推廣資訊。

(Applicable to schemes governed by a trust 適用於受信託所管限的計劃)

1. The personal data provided by Participating Employers (if applicable) and/or Members and details of transactions or dealings by such Participating Employers (if applicable) and/or Members from time to time may, to the extent not prohibited by applicable law, be used for one or more of the following purposes:-(i) the administration and/or management of or in connection with the contributions or benefits or accounts in respect of the Participating Employers (if applicable) and/or Members under the HSBC occupational retirement schemes and Hang Seng occupational retirement schemes administered by the HSBC Group; (ii) conducting direct marketing activities of occupational retirement scheme products and/or occupational retirement scheme services by entities of the HSBC Group as described in paragraph 5 below only if your consent is obtained (which includes an indication of no objection); (iii) improving and furthering the provision of occupational retirement scheme products and/or services (including through customer research or surveys) by entities of the HSBC Group; (iv) matching for occupational retirement scheme related purpose with other personal data concerning the relevant Participating Employers (if applicable) and/or Members; (v) compliance or in accordance with an order of a court, or compliance or in accordance with a law or a requirement made under a law (e.g. the Inland Revenue Ordinance and its provisions including those concerning automatic exchange of financial account information), or compliance or in accordance with any agreement or treaty or any present or future contractual or other commitment with any regulators or government authorities in any jurisdictions, including but not limited to an agreement by one or more entities of the HSBC Group under the provisions of U.S. tax law known as the Foreign Account Tax Compliance Act ('FATCA'), and the guidelines, guidance or requests given or issued by the Inland Revenue Department including those concerning automatic exchange of financial account information (collectively, the 'Compliance Obligations'). 不時由參與僱主(如適用)及／或成員所提供的個人資料及該等參與僱主(如適用)及／或成員的交易或事務往來的詳情，限於不在適用法律禁止之列，將可被用於以下一項或多項用途：(i)由滙豐集團管理行政的滙豐職業退休計劃及恒生職業退休計劃下與參與僱主(如適用)及／或成員的供款或權益或戶口有關的行政事宜及／或管理；(ii)在獲得你的同意下(包括表示不反對)，進行以下第5段所述由滙豐集團成員所提供的職業退休計劃產品及／或職業退休計劃服務的直接有關促銷活動；(iii)改善及進一步提供由滙豐集團成員所提供的職業退休計劃產品及／或服務(包括透過客戶研究或調查)；(iv)為任何職業退休計劃相關的用途而核對相關參與僱主(如適用)及／或成員的其他個人資料；(v)遵守或按照法庭命令，或遵守或按照法律或根據法律訂立的規定(例如《稅務條例》及其條文，包括關於自動交換財務賬戶資料的條文)，或遵守或按照任何與任何司法管轄區的監管機構或政府機關之間達成的協議或條約或任何現在或將來的合同或其他承諾，包括但不限於與一個或多個滙豐集團成員根據美國名為《外國賬戶稅務合規法案》(《外國賬戶稅務合規法案》)的稅務法律的規定所達成的協議，及稅務局所提供或發出的指引、指導或要求，包括關於自動交換財務賬戶資料的指引、指導或要求(統稱為「合規義務」)。

2. Failure to provide your information may result in us being unable to process your application or perform the services you request. 如你未能提供資料將可能導致我們未能處理你的申請或提供你所要求的服務。

3. Personal data held by us relating to a Participating Employer (if applicable) and/or Member will be kept confidential but, to the extent not prohibited by applicable law, such information may be provided by us or any of our service providers to the following parties for the purposes set out in paragraph 1:-(i) any regulators or government authorities; (ii) any service provider, agent or contractor who provides administrative, telecommunications, computer, payment, data processing, matching, storage, customer research or survey or other services in connection with the operation of our occupational retirement scheme business; (iii) relevant Participating Employers (if applicable); (iv) entities of the HSBC Group. Such information may be transferred to a place outside Hong Kong Special Administrative Region. 由我們持有參與僱主(如適用)及／或成員的個人資料將予保密，但限於不在適用法律禁止之列，我們或任何我們的服務供應商可能會將該等資料提供給以下各方作第1段所述的用途：(i)任何監管機構或政府機關；(ii)任何提供與營運我們的職業退休計劃業務有關的行政、電訊、電腦、付賬、數據處理、核對、儲存、客戶研究或調查或其他服務的任何服務供應商、代理人或承包商；(iii)相關的參與僱主(如適用)；(iv)滙豐集團成員。該等資料可能轉移至香港特別行政區以外的地方。

4. You have the right to request access to and correction of your personal data held by us. Request should be addressed to: The Data Protection Officer, HSBC Institutional Trust Services (Asia) Limited, c/o The Hongkong and Shanghai Banking Corporation Limited, PO Box 74203, Kowloon Central Post Office. For enquiries, please contact our Hotline at (852) 2288 6655. 你有權要求查閱及更改由我們持有的個人資料。如有需要，可致函九龍中央郵政信箱74203號(c/o The Hongkong and Shanghai Banking Corporation Limited香港上海滙豐銀行有限公司)，向滙豐機構信託服務(亞洲)有限公司資料保障主任提出要求。如有查詢，可致電(852) 2288 6655。

5. To the extent not prohibited by applicable law, we, entities of the HSBC Group, intend to use your personal data in direct marketing of occupational retirement scheme products and/or occupational retirement scheme services, and we require your consent (which includes an indication of no objection) for that purpose. In this connection, please note that: 限於不在適用法律禁止之列，我們，滙豐集團成員，擬把你的個人資料用於職業退休計劃產品及／或職業退休計劃服務的直接促銷，而我們為該用途須獲得你的同意(包括表示不反對)。就此，請注意：

- (i) your name, contact details, other products and services portfolio information, transaction pattern and behaviour, financial background and demographic data held by us from time to time may be used in direct marketing; and 我們可能把我們不時持有你的姓名、聯絡資料、其他產品及服務組合資料、交易模式及行為、財務背景及人口統計數據用於直接促銷；及
- (ii) the occupational retirement scheme products and/or occupational retirement scheme services offered by entities of the HSBC Group may be marketed. 可用作促銷由滙豐集團成員所提供的職業退休計劃產品及／或職業退休計劃服務。

If you no longer want us to use your personal data in direct marketing activities as described in paragraph 5 above, you may exercise your opt-out right by notifying us. 如你不再希望你的個人資料被用於上述第5段所述的直接促銷活動，你可通知我們，行使你的選擇權拒絕促銷。

Please tick if you do not wish your personal data to be used for purpose of conducting direct marketing activities stated in paragraph 5 above. 如你不希望你的個人資料被用於上述第5段所列明的直接促銷活動，請在方格內填上剔號。

The above represents your present choice whether or not to receive direct marketing contact or information. This replaces any choice communicated by you to us prior to this application. Please note that you can change your marketing preference anytime, by calling us on (852) 2288 6655, to receive our best offers and promotions. 以上代表你目前就是否希望收到直接促銷聯繫或資訊的選擇，並取代你於本申請前向我們傳達的任何選擇。請注意：接收推廣資訊喜好設定可隨時作出變更，致電我們(852) 2288 6655，從而接收我們的精彩優惠及推廣資訊。

I/We confirm that the information given in the form is correct and complete. 本人／吾等確認本表格所提供的資料為正確及完整。

Authorised signature of employer 僱主授權簽署 X	Authorised signature of employer 僱主授權簽署 (if any 如有) X
Full name 全名	Full name 全名
Job position 職銜	Job position 職銜
Date 日期	Date 日期

For Office Use Only 公司專用	Signature verified by Date	Entered by Date	Checked by Date
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