



## 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)*

Please read the following **important notes** before completing this Form.

### Filling In This Form

- (a) This Form is to be used for consolidating multiple personal accounts into one account of your election.
- (b) You must fill in both this Form (one page) and the Appendix (one page) and submit them (two pages in total) to your elected trustee and keep a copy for your future reference. If any information provided, including your signature, is incorrect or incomplete, the trustees may not be able to process your request promptly.
- (c) The personal data to be supplied in support of this election of transfer are to be used for processing your request for account consolidation. The personal data you supply may, for such purpose, be transferred to the trustee(s) concerned, the relevant service provider(s), and the government or regulatory bodies including the Mandatory Provident Fund Schemes Authority (MPFA).
- (d) "Consolidation" and "consolidating" of multiple personal accounts refers to transferring all MPF accrued benefits (benefits) from several MPF personal accounts to an account under your elected MPF registered scheme (scheme).
- (e) "Contribution account" - an account in a scheme which is mainly used to receive MPF contributions (both employer and employee portions) made by an employer for or on behalf of the employee or MPF contributions made by a self-employed person.
- (f) "Personal account" - an account in a scheme which is mainly used to receive the benefits transferred from other contribution or personal account(s).

### Reminders Before Consolidating

- (g) Please ensure that you have a personal account or a contribution account in your elected scheme to which the benefits in your personal accounts indicated in the Appendix are to be transferred and consolidated. Otherwise, you have to submit a membership enrollment form before or at the same time you submit this Form and the Appendix to your elected trustee. Please consult your elected trustee for the procedures and required documents for setting up an account.
- (h) For each of your personal accounts to be consolidated using this Form, the entirety of your benefits in the account, including voluntary contributions (if any and subject to the governing rules of the scheme), will be transferred to your elected scheme in a lump sum.
- (i) In order to prevent a third party from filling in incorrect information, please **DO NOT sign on a blank form**. After the completed Form and Appendix have been received by your elected trustee, the administration procedures taken by the trustees may not be reversible.
- (j) If you are currently investing in an MPF guaranteed fund, a transfer of the benefits out of that guaranteed fund may result in some or all of the guarantee conditions not being satisfied; thus affecting your entitlement to the guarantee. Please check the offering document of the scheme(s) or consult your trustee(s) for details.
- (k) If you wish to transfer your benefits from one scheme to another, please be aware of how the transferred-in benefits will be invested. In general, the transferred-in benefits will be invested according to the default investment strategy (DIS) if you either (i) do not give or have not given any investment instructions for the account to the trustee of your elected scheme or (ii) have given investment instructions for the account to invest benefits according to the DIS. Please approach the trustee of the elected scheme to seek clarification, where necessary. If you wish to change or specify an investment instruction for the account in the elected scheme, please also approach the trustee of the elected scheme.
- (l) If you have reached, or are approaching, the age of 50 and your benefits are currently invested according to the DIS of the scheme, you should be aware that the de-risking mechanism of the DIS starts at the age of 50. If the annual de-risking of your investment in the DIS and your transfer request take place at around the same time, the trustee of the scheme shall sequence the de-risking and the transfer request in accordance with its procedures and in compliance with the Mandatory Provident Fund Schemes Ordinance. Please consult the relevant trustee(s) if you wish to know the details of how the trustee(s) will handle these transactions.
- (m) Please refer to the MPFA's publications available from the MPFA website ([www.mpfa.org.hk](http://www.mpfa.org.hk)) for the factors to consider when choosing a scheme and the potential risks involved in MPF investment.

### Enquiries

- (n) Information about a scheme is set out in the offering document of that scheme. This information will assist you in making a decision about whether to make a transfer of benefits to that scheme. Please contact the relevant trustees for enquiries about account details and information on specific schemes or funds.
- (o) For general enquiries regarding account consolidation, you may contact the relevant trustees or the MPFA (email: [mpfa@mpfa.org.hk](mailto:mpfa@mpfa.org.hk) or hotline: **2918 0102**).

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						
<b>Name</b> <sup>1</sup> <i>(as shown on your Hong Kong Identity (HKID) Card)</i>	Surname:					
	Other Name:					
<b>Identification</b>	HKID Card No.:					
	Passport No.: <i>(ONLY for scheme member without HKID Card)</i>					
<b>Contact Details</b>	Daytime Phone No.:			Mobile Phone No.:		
	Email Address (if any):					
<b>Correspondence Address</b>	Flat/Room	Floor	Block	Building		
	Estate			Street No.	Street / District	
	Hong Kong / Kowloon / New Territories <i>(delete whichever is inappropriate)</i>			Region / Country		
SECTION II. MY ELECTED SCHEME						
I elect to transfer all MPF accrued benefits (benefits) from my personal accounts indicated in the <b>Appendix</b> to my elected scheme <sup>2</sup> :						
<b>Name of My Elected Scheme</b>						
<b>Account Type</b> <i>(Select one only and ✓ as appropriate)</i>	<input type="checkbox"/> Personal account <b>OR</b> <input type="checkbox"/> Contribution account (Employer Identification No. <sup>3</sup> : )					
<b>Scheme Member Account No.</b> <sup>4</sup>						
SECTION III. AUTHORIZATION AND DECLARATION						
<p>(a) I hereby give consent to the trustee of my elected scheme and the MPFA to disclose information supplied by me in support of this election of transfer to the trustee(s) concerned and the relevant service provider(s), or to enable such party or parties to access or disclose relevant information for processing my election of transfer.</p> <p>(b) I hereby give the trustee(s) indicated in the Appendix an instruction to terminate my relevant personal accounts as referred to in the Appendix upon transfer of the full benefits to my elected scheme and there is no residual balance in the said accounts.</p> <p>(c) I declare that I have read and understood the Notes on page 1 of this Form and the Explanatory Notes and to the best of my knowledge and belief, the information given in this Form and the Appendix is correct and complete.</p>						
Signature <sup>5</sup>				Date (DD/MM/YYYY)		

**REMINDER: Please sign only when the form is fully completed.**

For MPF Intermediary Use Only

For service enquiries, please contact:	Contact Person
Contact Number	Code

**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.<sup>5</sup>:

<b>Trustee Name</b>	<b>Scheme Name</b>	<b>Scheme Member Account No.</b>
AIA Company (Trustee) Limited	AIA MPF - Prime Value Choice	
Bank Consortium Trust Company Limited	AMTD MPF Scheme	
	BCT (MPF) Industry Choice	
	BCT (MPF) Pro Choice	
	BCT Strategic MPF Scheme	
	Manulife RetireChoice (MPF) Scheme	
Bank of Communications Trustee Limited	BCOM Joyful Retirement MPF Scheme	
Bank of East Asia (Trustees) Limited	BEA (MPF) Industry Scheme	
	BEA (MPF) Master Trust Scheme	
	BEA (MPF) Value Scheme	
BOCI-Prudential Trustee Limited	BOC-Prudential Easy-Choice Mandatory Provident Fund Scheme	
	My Choice Mandatory Provident Fund Scheme	
China Life Trustees Limited	China Life MPF Master Trust Scheme	
HSBC Provident Fund Trustee (Hong Kong) Limited	Fidelity Retirement Master Trust	
	Haitong MPF Retirement Fund	
	Hang Seng Mandatory Provident Fund - SuperTrust Plus	
	HSBC Mandatory Provident Fund - SuperTrust Plus	
Manulife Provident Funds Trust Company Limited	Manulife Global Select (MPF) Scheme	
Principal Trust Company (Asia) Limited	Principal MPF Scheme Series 800	
	Principal MPF – Simple Plan	
	Principal MPF – Smart Plan	
Sun Life Trustee Company Limited	Sun Life Rainbow MPF Scheme	
YF Life Trustees Limited	MASS Mandatory Provident Fund Scheme	

The trustees and schemes listed above are as of: 29 November 2023

### Explanatory Notes

1. If you do NOT possess a HKID Card, please fill in your name as shown on your passport.
2. Your request for consolidating personal accounts may not be processed if the name of your elected scheme or your scheme member account number of that scheme is not provided or is incorrect. The information can be found in your notice of participation or, as the case may be, membership certificate, notice of acceptance, or annual benefit statement. If you are in doubt, please contact the relevant trustee.

Please note that only the personal accounts you have elected in the Appendix will be consolidated. Those that you have not elected in the Appendix will not be consolidated.

3. The employer's identification number is the number assigned by the trustee to the employer concerned. Trustees may use different names for this number (e.g. account number, company code, contract number, employer account number, employer code, employer ID, employer number, MPF client number, participating plan number, plan number, scheme number, scheme ID, sub-scheme number). The number can be found in the statements issued by the trustees or through the member enquiry facilities available from trustees. If you are in doubt, please contact your trustee or your employer.
4. You may leave the scheme member account number blank if you have recently enrolled in the scheme and have not been notified of the scheme member account number. If you are in doubt, please contact the relevant trustee.
5. Your request for consolidating a particular personal account listed in the Appendix may not be processed if:
  - a. your scheme member account number of that personal account is not provided or is incorrect; or
  - b. the signature in this Form does not match the specimen signature previously given to that particular trustee.

However, consolidation will proceed for other personal accounts where the scheme member account number and signature are correct.

Your scheme member account number can be found in your notice of participation or, as the case may be, membership certificate, notice of acceptance, or annual benefit statement. If you are in doubt, please contact the relevant trustee(s).

## MPF Customer Identification Form

### 強積金確認客戶身份證明書

If you have forgotten / not sure about your signature record with your original trustee, we recommend you to use this form to request the original trustee to process the fund transfer application. To use it, please

- put your ID Card/Passport on the place as specified below and make a photocopy
- read the statement and sign on the copy. Your signature should be same as that on the relevant fund transfer form / account consolidation form submitted
- submit this form together with the relevant fund transfer form / account consolidation form
- ensure the copy of ID Card/Passport is clear and in pale color

如您已忘記/不肯定您於原受託人之簽署紀錄，我們建議您使用此證明書要求原受託人處理資金轉移申請。使用時，請

- 將身份證/護照放在下方預留位置並影印
- 細閱聲明並於副本上簽署，您的簽署式樣必須與有關資金轉移表格/帳戶整合表格相同
- 將此證明書與有關的資金轉移表格/帳戶整合表格一併遞交
- 確保身份證/護照副本影像清晰及淺色

Please place Hong Kong ID Card/Passport here and  
photocopy  
請放上香港身份證/護照並影印

I confirm that the Hong Kong Identity Card/Passport provided is a copy of the original and my signature is my own signature. I request the trustee of any Mandatory Provident Fund (MPF) schemes in which I am a member to process the transfer application(s) submitted together with this document. I agree and understand that my signature provided here would be used for the current application(s) only and would not change any of my signature record which I have provided to the MPF trustees previously.

本人確認在此提供的香港身份證/護照是原件的副本，而簽名是本人的簽名。本人要求任何本人作為強制性公積金計劃（強積金）成員的受託人處理與這信件一同遞交的轉移申請。本人同意及明白在此提供的簽名將僅用於目前的轉移申請，而並不會更改任何本人過去曾經提供強積金受託人的簽名記錄。

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Signature of customer 客戶簽署

(signature should be the same as that on the relevant fund transfer form / account consolidation form)  
(簽名式樣須與有關資金轉移表格/帳戶整合表格相同)