

永明彩虹強積金計劃
Sun Life Rainbow MPF Scheme
 自僱人士年度聲明

Annual Declaration of Self-employed Person

 SEP/ _____ 自 _____ 年 _____ 月 _____ 日至 _____ 年 _____ 月 _____ 日的財政期
For the Financial Period from _____ to _____
第一部分 Part I 個人資料 Personal Details

英文姓名 (須與香港身份證 / 護照相同) Name in English (must be same as HKID/Passport)	身份證明文件 Identity Document <input type="checkbox"/> 香港身份證 HKID <input type="checkbox"/> 護照 Passport _____ 身份證明文件號碼 Identity Document Number _____
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第二部分 Part II 強制性供款形式 Mandatory Contribution Mode

 請在適當方格加上剔號 (✓)，只選擇下列**其中一項**。 Please choose **ONE** and check (✓) the appropriate box.

- 每月 (供款期為每個曆月之第一日至每個曆月之最後一日，而「供款日」為每月之最後一日。)
 Monthly (contribution period is from the first day to the last day of each calendar month, "Contribution due date" is the last day of each month.)
- 每年 (供款期為每年 1 月 1 日至 12 月 31 日，而「供款日」為每年之最後一日。)
 Annually (contribution period is from January 1 to December 31, "Contribution due date" is the last day of each year.)

第三部分 Part III 供款的有關入息 Relevant Income

請選擇一項強制性供款的有關入息聲明：

 Please choose **ONE** Relevant Income Declaration option for the payment of mandatory contribution:

- (A) 根據最近評稅通知書之應評稅利潤 (請提供一份「利得稅」或「個人入息課稅」之評稅通知書副本作為有關入息證明，恕不接受「薪俸稅單」)
 Based on the assessable profits on the most recent Notice of Assessment. (Please provide a copy of Notice of Assessment of "Profits Tax" or "Personal Assessment" as evidence of your relevant income. Notice of Assessment of "Salaries Tax" is not applicable)
- (B) 因經營的業務在上一財政期內蒙受淨虧損^{備註1}，故沒有適用的強制性供款入息
 Net loss¹ sustained by the business(es) in the preceding financial period, there will be no relevant income for MPF contribution.
- (C) 根據最高入息水平供款^{備註2}
 Contribute based on the maximum level of relevant income².
- (D) 根據以下所聲明有關入息
 Based on the relevant income as declared.

本人謹此聲明，就永明彩虹強積金計劃在上述的財政期：

I hereby declare that in relation to the financial period stated above of the Sun Life Rainbow MPF Scheme:

有關入息聲明 Relevant Income Declaration

請選 1 或 2，並於方格加上剔號 (✓)。 Please check (✓) either option 1 OR 2.

 本人之有關入息低於法例訂定的最高有關入息水平^{備註2} (定義同上)；而本人之有關入息將按以下選擇計算：

 My relevant income is below the maximum level of relevant income^{Note2} stipulated by law (definition per above); AND my relevant income will be calculated according to the option chosen below:

1. 按照稅務條例 (香港法例第 112 章) 第 IV 部分計算的上一年度應評稅利潤，即港幣 _____ (年薪)。本人明白此選擇只適用於以下三種情況：

- 本人最近期評稅通知書的發出日期，與本人出示該通知書作為本人有關入息的證據的日期之間相隔超越 24 個月。
- 本人已對最近期評稅通知書提出反對 / 上訴
- 本人未能出示本人最近期評稅通知書

My assessable profits for the preceding year of assessment calculated in accordance with Part IV of the Inland Revenue Ordinance (Cap.112), which is HK\$ _____ (per year). I understand that this option will only be applicable under the following three circumstances:

- The issue date of my most recent Notice of Assessment is more than 24 months from the date on which the notice is presented as evidence of relevant income.
- I have objected to / appealed against my most recent Notice of Assessment.
- I am unable to provide my most recent Notice of Assessment.

2. 根據稅務條例 (香港法例第 112 章) 第 28 條所指的基本免稅額 (因本人未能提供本人之入息證明予信託人)。

The basic allowance in force within the meaning of Section 28 of the Inland Revenue Ordinance (Cap. 112) (since I cannot provide the Trustee with any evidence of my income).

備註 Notes

1. 淨虧損之計算必須根據稅務條例 (香港法例第 112 章) 第 IV 部。 The net loss must be calculated in accordance with Part IV of the Inland Revenue Ordinance (Cap.112).

2. 最高有關入息水平上限可隨法例更改而不時變動。由 2014 年 6 月 1 日或以後之供款期開始，為每月港幣\$30,000 或每年港幣\$360,000。 The maximum level of relevant income is subject to change of legislation from time to time, which is HK\$30,000 per month or HK\$360,000 per year with effect from contribution period beginning on or after 1 June 2014.



第四部分 Part IV 個人資料收集聲明 (2018-03 版本) PERSONAL INFORMATION COLLECTION STATEMENT (Version 2018-03)

申請人／成員明白及同意永明信託有限公司(「受託人」)可以將其所收集的任何個人資料(不論由此申請表所收集或由其他途徑取得)作以下用途:(i)處理成員的此項申請及任何其他申請；(ii)為申請人／成員參與本計劃；(iii)管理成員於本計劃的供款和累算權益的事宜；(iv)進行客戶調查；(v)為客戶研究及設計金融、保險或退休金產品；(vi)為申請人／成員甄選及參與獎賞、忠實或特選客戶計劃；(vii)因上述目的與成員聯絡；(viii)與上述目的直接有關的任何其他目的；及(ix)為遵守適用的法例、法規或法庭命令。

受託人亦可使用申請人／成員的聯絡資料、基本個人資料投資選擇及累算權益，就本計劃的產品的推廣資訊，以包括電話、郵件、電郵、電話短訊或任何電子信息等方法聯絡申請人／成員。除非得到申請人／成員同意(包括表示不反對)，否則受託人不可使用申請人／成員資料為該用途。若申請人／成員不同意接受此等推廣資訊，可於表格的聲明和授權部份適當位置填上剔號。

受託人可為以上目的披露申請人／成員的個人資料予(a)為協助受託人就上述用途(不論在香港或其他地方)而提供服務的第三方，包括計劃管理人(條件是有關承辦商須把所有個人資料保密並只會為提供有關服務而使用個人資料)；(b)申請人／成員的銀行作繳款用途；(c)申請人／成員的保險經紀(如有)；(d)申請人／成員的強積金中介人；(e)受託人的關連公司(根據公司條例訂明)包括保險公司及金融服務機構；(f)受託人及其關連公司(不論在香港與否)為遵守監管當局或其他機構發出之指引或其就法例、法規或法庭頒令所約束或規定之責任而需向其作出披露的任何人士；(g)有關僱主；及(h)按法例要求或准許的其他人仕。

受託人可就法例准許或於獲得申請人／成員的同意後披露或將申請人／成員的個人資料作其他用途。

申請人／成員明白申請人／成員所提供之個人資料均屬自願，然而倘若未能提供所需個人資料，可導致受託人無法處理申請人／成員的申請。申請人／成員有權查閱及要求更正受託人持有有關成員的個人資料，有關要求可以書面形式郵寄至香港九龍紅磡德豐街 18 號海濱廣場一座 10 樓卓譽金融服務有限公司退休金管理部經理。受託人可就處理任何該等要求收取合理費用。

Applicant/Member(s) understand(s) and consent(s) that, any personal data collected by Sun Life Trustee Company Limited ("Trustee") (whether collected in this application form or otherwise) may be used by the Trustee for the following purposes: (i) processing this application and any other applications applicant/member(s) make(s); (ii) enrolling applicant/member(s) in the Scheme; (iii) administering and managing applicant/ member(s)' contributions and accrued benefits under the Scheme; (iv) conducting customer surveys; (v) researching and designing financial, insurance or pensions products for customer use; (vi) selecting and participating in reward, loyalty or privileges program and related service for applicant/member(s); (vii) contacting applicant/member(s) for the above purposes; (viii) purposes which are directly related to the above purposes; and (ix) complying with applicable laws, regulation or court order.

The Trustee may also use applicant/member(s)' contact details, demographic information, investment choices and accrued benefits to contact applicant/member(s) with marketing information regarding the Scheme, including by phone calls, mail, email, SMS or any type of electronic message. The Trustee may not so use applicant/member(s)' data unless the Trustee have received applicant/member(s)' consent (which includes an indication of no objection). Tick the box in appropriate area under the Declaration and Authorization in the form if member(s) do(es) not consent to receive such marketing information.

The Trustee may disclose member(s)' personal data for the above purposes : (a) to third parties who provide services in Hong Kong or elsewhere which assist the Trustee to carry out the above purposes, including scheme administrator (provided that such contractors are required to keep all such personal data confidential and may only use the personal data to provide those services); (b) to applicant/member(s)' bank for payment purposes; (c) to applicant/member(s)' insurance broker (if any); (d) to applicant/member(s)' MPF intermediaries; (e) to the Trustee' s related companies (as defined in the Companies Ordinance) including insurance companies and financial services companies; (f) to any person to whom the Trustee or it's related companies (inside or outside Hong Kong) is under an obligation to make disclosure under the requirements of any law, regulation or court order binding on or applying to or to which the Trustee or its related companies (inside or outside Hong Kong) is subject to, or under and for the purposes of any guidelines issued by regulatory or other authorities with which the Trustee or its related companies (inside or outside Hong Kong) is expected to comply; (g) relevant employer(s) and (h) as otherwise required or permitted by law.

The Trustee may also use and disclose member(s)' personal data in other ways with applicant/member(s)' consent or as otherwise required or permitted by law.

Applicant/Member(s) understand(s) that the information applicant/member(s) gave is voluntary, but failure to provide the requested personal data may mean the Trustee is unable to process applicant/member(s)' application. Applicant/Member(s) has/have the right to seek access to and request correction of any personal data the Trustee holds by sending a written request to The Manager, Pensions Administration Department, BestServe Financial Limited, 10/F, One HarbourFront, 18 Tak Fung Street, Hung Hom, Hong Kong. The Trustee may charge a reasonable fee for the processing of any such requests.

本人謹此聲明，就本人所知及所信，本表格提供的資料均屬正確及完整。

I declare that, to the best of my knowledge and belief, the information given in this form is correct and complete.

簽署 Signature

請簽署 Please sign here 

日期 Date _____

請將填妥表格交予：

永明彩虹強積金計劃行政管理人 — 卓譽金融服務有限公司
香港九龍紅磡德豐街 18 號海濱廣場一座 10 樓

電話： 3183 1888 傳真： 3183 1889 網址： www.sunlife.com.hk

Please send the completed form to :

Sun Life Rainbow MPF Scheme, The Administrator, BestServe Financial Limited 10/F, One Harbourfront, 18 Tak Fung Street, Hung Hom, Kowloon, Hong Kong

Tel: 3183 1888 Fax: 3183 1889 Website: www.sunlife.com.hk

For office use only:

Payment by DDA?

以直接付款法繳交供款？

Yes*

是

No

否

* If yes, send DDA form to member to increase limit if limit is lower than the revised contribution amount.

* 如選擇是，而現有每次付款限額低於調整後之供款額，請寄直接付款授權書予成員作出更改限額授權。

Processed by: _____

Date: _____

Checked by: _____

Date: _____