

# HONG KONG BAPTIST UNIVERSITY 1998 SUPERANNUATION FUND

## ("the Superannuation Fund")

### 香港浸會大學 1998 公積金計劃 ("公積金計劃")

#### SET UP/CHANGE/TERMINATION OF EMPLOYEE VOLUNTARY CONTRIBUTION FORM 建立/更改/終止僱員自願性供款表格

#### Important Notes 重要事項：

1. **The accrued benefits derived from the Employee Voluntary Contribution CAN ONLY be withdrawn after the Member ceases employment with the University.** 僱員自願性供款所衍生的累算權益只能在成員與大學的僱傭關係結束後才可以提取。
2. **The Employee Voluntary Contribution is NOT tax-deductible.** 僱員自願性供款是不可以作扣稅用途。
3. Please clearly mark and counter-sign all amendments. 如有任何刪改，必須清楚註明並在旁加簽。
4. Only duly completed Forms signed by the Member will be treated as valid instructions. Any incomplete Form or any Form containing any unclear instruction will not be processed and will be deemed invalid. 只接受填妥表格並已由成員簽署，方作為有效指示。任何不完整的表格或表格中含有不清晰指示，將不被處理，並會列作為無效。
5. Please complete, sign and submit this form to the Payroll Section of the Finance Office at least one month before the effective dates as detailed below: 請將此表格填妥及簽署，並於以下所列的生效日期前最少一個交回財務處 - 薪俸組：

Two Effective Dates Per Year 每年兩次生效日期	Form Receipt Deadline 表格接收截止日期
1 January 1月1日	1 December 12月1日
1 July 7月1日	1 June 6月1日

6. To safeguard the confidential or/and sensitive information contained in this form from being leaked to unintended recipients, please submit the duly completed and password-encrypted form and required supporting document(s) by email to [foformssubmit@hkbu.edu.hk](mailto:foformssubmit@hkbu.edu.hk), followed by the encryption password in a separate email. 為保障您表格上的個人或/及敏感資料不被洩露於非指定的收件人，請將填妥的表格及隨附的證明文件以密碼加密並將之電郵至 [foformssubmit@hkbu.edu.hk](mailto:foformssubmit@hkbu.edu.hk)。請再以另一電郵提供加解密碼。
7. If you have any question when completing this form, please contact the Finance Office's hotline at ext. 2404. 如閣下於填寫表格時有任何疑問請致電成員熱線 2404。

#### Section A – Member Information 第一部份 - 成員資料

Name of Member 成員姓名：		
<input type="checkbox"/> Mr. 先生 <input type="checkbox"/> Ms. 女士 <input type="checkbox"/> Mrs. 太太 <input type="checkbox"/> Prof. 教授 <input type="checkbox"/> Dr. 博士 (Please ✓ the appropriate box 請在適當方格內填上 ✓ 號)		
Surname 姓		First Name 名 [same as HKID Card/Passport 與香港身份證 / 護照一致]
HKID Card / Passport* Number 香港身份證 / 護照*號碼	Staff Number 員工號碼	Contact Phone Number 聯絡電話號碼

#### Section B – Instruction Details 第二部份 – 指示資料

(Please ✓ select appropriate boxes 請在合適方格內填上 ✓ 號)

Instruction Type 指示類別	Effective Date** 生效日期**
<input type="checkbox"/> Set up a new Employee Voluntary Contribution Plan * 建立新的僱員自願性供款計劃*	
<input type="checkbox"/> Change of existing Employee Voluntary Contribution Plan 更改現有的僱員自願性供款計劃	1 January 1月1日_____ (YYYY 年) 1 July 7月1日_____ (YYYY 年)
<input type="checkbox"/> Termination of my Employee Voluntary Contribution Plan 終止本人的自願性供款計劃	

\* The Employee Voluntary Contribution will be made for at least 6 months from the indicated effective date until Member's next proper instruction of change is received by Payroll Section of the Finance Office. 僱員自願性供款將會由上述生效日期開始維持最少6個月，直至財務處 - 薪俸組收到成員下一次完整的指示變更。

\*\* The effective month must be January or July every year. 生效月必須是每年的一月或七月。

## Section C – Details of Employee Voluntary Plan 第三部份 - 僱員自願性供款計劃明細

Monthly Employee Voluntary Contribution<sup>^</sup>每月僱員自願性供款<sup>^</sup> (Please ✓ select one box only 請以 ✓ 號選擇以下其中一個選項):

- 5% of my monthly basic salary 每月基本底薪的 5%  
 10% of my monthly basic salary 每月基本底薪的 10%  
 15% of my monthly basic salary 每月基本底薪的 15%

<sup>^</sup> The Employee Voluntary Contribution will be deducted from your monthly payroll. 僱員自願性供款將會在您的每月薪金中扣除。

## Section D – Personal Information Collection Statement 第四部份 - 收集個人資料聲明

The personal data collected from you will only be accessed and handled by properly authorised staff of the administrator, the trustee or participating employers of the Superannuation Fund and its properly authorised service providers and will only be used for processing the instructions of this form; administering and managing the contributions and accrued benefits under the Superannuation Fund; compliance with applicable laws and regulations; any other purpose relating to the above; and the carrying out of matching procedures with any other personal data for the purpose of running a pension and trust business. If required by law or relevant regulations, the above parties may provide such personal data to governmental bodies, regulators or other third parties. Failure to provide the requested information may suspend the instructions. For more details of the University's Privacy Policy Statement and Personal Information Collection Statement, please visit the website at <http://bupdp0.hkbu.edu.hk/policies-and-procedures/pps-pics/>.

從您收集之個人資料，僅供本公積金計劃的管理人、信託人或參與本公積金計劃的各僱主公司正式授權之職員及服務供應商使用及處理，並且只會被用作處理此表格之指示；處理和管理參與公積金計劃下之供款及累算權益；遵守法律及規例；與上述有關之任何其他用途；及為經營退休計劃及信託業務而與其他個人資料進行核對程序。如因法律或相關規例規定，以上各方可向政府機關、監管機構或其他第三者提供有關個人資料。未能提供所需資料可能會導致相關指示被終止。有關大學私隱政策聲明及個人資料聲明的詳情，請瀏覽網站 <http://bupdp0.hkbu.edu.hk/policies-and-procedures/pps-pics/>。

## Section E – Declaration 第五部份-聲明

1. I accept the provision of the Trust Deed and the Rules of the Superannuation Fund. 本人接納有關信託契約的條款和公積金計劃的規例。
2. I have read and understood the items under the Important Notes section and Section D above and agreed to be bound by them. 本人已閱讀及明白重要事項之下的項目及在第四部份的附註並同意接受該等附註的約束。
3. I acknowledged that accrued benefits derived from the Employee Voluntary Contribution cannot be withdrawn until my employment with the University ends. I also acknowledged that the Employee Voluntary Contribution is not tax-deductible. 本人明白僱員自願性供款衍生的累算權益將不能在我與大學的僱傭關係結束前提取。本人亦明白僱員自願性供款是不可以用作扣稅。
4. I hereby authorise the University to deduct the percentage stated in Section C of my basic salary monthly and pay the sum so deducted to the Trustee as my Employee Voluntary Contributions. 本人現授權大學每個月由我的基本月薪中扣除第三部分訂明的百分比並撥給有關信託人作為本人的僱員自願性供款。
5. I understood that the Employee Voluntary Contribution will be invested using the prevailing investment mandates given by me. 本人明白該僱員自願性供款將按照本人給予的現行投資授權進行投資。
6. I acknowledge that I have read and fully understood the following contents regarding the investment risks before making an investment decision. 本人確認本人在作出投資決定前，已閱讀及完全明白下述有關投資風險的內容。
  - (i) The performance of the underlying Fund's investments may involve substantial market, currency, credit/counterparty, regulatory and political risks. 相關基金的投資表現可能涉及重大市場、貨幣、信貸/交易對手、監管及政治風險。
  - (ii) In particular, the securities that the Fund invests in are typically unsecured debt obligations not supported by any collateral. The Fund may also invest in below investment grade or non-rated securities. These securities may carry higher credit risk than those rated as investment grade. 尤其是基金投資在一般為無抵押的償還債項，並無任何抵押品支持。基金亦可投資於未達投資級別或未獲評級的證券。這些證券或會比投資級別的證券有較高的信貸風險。
  - (iii) For securities invested in a single country, the underlying investment may be subject to higher concentration and liquidity risks. 對於投資在單一國家的證券，其相關投資可能涉及較高的集中風險及流動性風險。
  - (iv) The value of a Fund can be volatile and could go down substantially within a short period of time. It is possible that an amount of your principal investment could be lost. 基金價格可能會較為波動且可能在短時間內大幅下跌，有可能令投資者損失部分投資的本金。
  - (v) You should consider your own risk tolerance level and financial circumstances before making any investment choices. When, in your selection of fund choice, you are in doubt whether the fund is suitable for you, you should seek financial and/or professional advices. 閣下應在作出投資決策之前，必須衡量個人可承受的風險程度及財政狀況。在選擇基金時，如閣下就某一項基金是否適合而有任何疑問，請徵詢財務及/或專業人士的意見。

\_\_\_\_\_  
Name of Member 成員姓名

\_\_\_\_\_  
Signature of Member 成員簽署

\_\_\_\_\_  
Date 日期: dd 日 / mm 月 / yyyy