



VOLUNTARY CONTRIBUTION AND WITHDRAWAL METHOD

自願性供款及提取方法

Please Note:
This appendix should be completed in **ENGLISH BLOCK LETTERS AND IN BLACK INK**.
Leave a space between numbers and words.
Delete as appropriate where marked with ***.
Submit **ORIGINAL COPY** only, fax copy will not be processed.

請注意：
本附件必須以**英文正楷及黑筆**填寫。
請於文字與數字間留一個空格。
請於***項目刪去不適用者。
請提交**正本**，傳真本將不獲處理。

APPENDIX B 附件 B

Name of Company (English) 公司名稱 (英文) : _____

PART A: VOLUNTARY CONTRIBUTION METHOD 第一部分：自願性供款方法

Unless you choose option 1 in Section II below, you will be required to use our AIA MPF Payroll Master CD ROM or other electronic means as agreed by us to submit contribution data. Otherwise, no validation will be performed by the Trustee.

注意：除選擇於部分II列出之項目1的方法外，閣下必須使用本公司提供的「友邦強積金出糧寶」發薪計算系統光碟或經本公司同意之其他電子媒介呈交供款資料。否則，本公司將不會核實貴公司之自願性供款。

- I) Will there be any eligibility requirement for employees to be entitled to employer making voluntary contributions for the employees?^[344]
僱主會否設定僱員獲享僱主作出自願性供款的資格？
- Yes 會 (please specify the completed months of service 請以整月註明服務年資：_____)
 No 否 (the commencement date of voluntary contributions will be the same as that of mandatory contributions 自願性供款之開始供款日將與強制性供款之開始供款日相同)
- II) Employer voluntary contribution methods 僱主自願性供款方法 (in addition to mandatory contribution 不包括強制性供款)^[793]
Please select one of the following and note that * means percentages must be in increments of 0.5% 請選擇下列其中一項，並於***項填上以0.5%為倍數之百分比**
- Fixed amount in addition to mandatory contribution^[SFA]
強制性供款額以外之固定供款額^[SFA] (please specify to the nearest dollar 請註明整數金額：_____ . 0 0)
 - Additional fixed percentage of the employees' relevant income with a monthly ceiling of HK\$20,000^[SRIC]
僱員有關入息之額外固定百分比，其入息上限為每月港幣20,000元^[SRIC] (please specify 請註明：_____ . _____ %[#])
 - Additional fixed percentage on employees' relevant income without a monthly ceiling of HK\$20,000^[SRIN]
僱員有關入息之額外固定百分比，但不受入息上限每月港幣20,000元之限制^[SRIN] (please specify 請註明：_____ . _____ %[#])
 - Mandatory contribution rate (5%) on relevant income in excess of HK\$20,000^[SMCRE]
有關入息超過港幣20,000元之強制性供款率 (5%)^[SMCRE]
 - Voluntary contribution = Total contribution rate x Relevant income (without a monthly ceiling of HK\$20,000) - Mandatory contribution^[TTCRN]
自願性供款 = 總供款率 x 有關入息 (不受入息上限每月港幣20,000元之限制) - 強制性供款^[TTCRN] (please specify 請註明：_____ . _____ %[#])
 - Fixed percentage of the employees' basic salary^[TBS]
僱員基本薪金的固定百分比^[TBS] (please specify 請註明：_____ . _____ %[#])
 - Matching voluntary contribution rate with that of your employees up to a ceiling amount of^[TMP]
與僱員自願性供款率相等並設有上限的金額^[TMP] (please specify to the nearest dollar 請註明整數金額：_____ . 0 0)
 - Matching voluntary contribution amount with that of your employees up to a ceiling amount of^[TMA]
與僱員自願性供款額相等並設有上限的金額^[TMA] (please specify to the nearest dollar 請註明整數金額：_____ . 0 0)

Please complete Table A if one of the voluntary contribution methods No. (9) to (12) is selected 如選擇下列第(9)至(12)項中其中一項，請填寫表A

- Additional varied percentage of the employees' relevant income (with a monthly ceiling of HK\$20,000) according to years of service^[TVRCS]/grade^[TVRCG]/both^[TVRCB]*
根據僱員的服務年資^[TVRCS]/職級^[TVRCG]/年資及職級^[TVRCB]* 並按其有關入息 (入息上限為每月港幣20,000元) 設定不同百分比
- Additional varied percentage of the employees' relevant income (without a monthly ceiling of HK\$20,000) according to years of service^[TVRNS]/grade^[TVRNG]/both^[TVRNB]*
根據僱員的服務年資^[TVRNS]/職級^[TVRNG]/年資及職級^[TVRNB]* 並按其有關入息 (不受入息上限每月港幣20,000元之限制) 設定不同百分比
- Varied percentage of the employees' basic salary according to years of service^[TVBSS]/grade^[TVBSG]/both^[TVBSB]*
根據僱員的服務年資^[TVBSS]/職級^[TVBSG]/年資及職級^[TVBSB]* 並按其基本薪金設定不同百分比
- Comparing current contribution with MPF mandatory contribution^[TCMPF] 現有供款與強制性公積金的強制性供款比較^[TCMPF]
(Voluntary contribution = Employee's basic salary x Contribution rate** - Mandatory contribution)
(自願性供款 = 僱員基本薪金 x 供款率** - 強制性供款)
** Please specify the existing contribution rate 請註明現行供款率
 Fixed percentage 固定百分比 (please specify 請註明：_____ . _____ %[#])
 Varied percentage according to years of service/grade/both* 按服務年資/職級/年資及職級*設定不同百分比
- Others, no validation will be performed by the Trustee (please provide supplement)
其他，受託人將不會核實貴公司之自願性供款 (請提供說明文件)

If space of Table A is insufficient, please provide your self-determined completed years of service/completed years of scheme service in our prescribed format as per Table A below on a separate sheet.

如表A空位不敷應用，請另紙提供閣下之自選服務年資/計劃服務年資比例，但必須如表A之格式。

Table A 表A (contribution percentage should be in increments of 0.5% 供款百分比須為0.5%的倍數)

(tick one only 只須選擇一項) <input type="checkbox"/> Completed years of service 服務年資## <input type="checkbox"/> Completed years of scheme service 計劃服務年資##		Determine benefit plan for various groups/grades 介定不同組別/級別人士之權益計劃					
<input type="checkbox"/> Default 預設		<input type="checkbox"/> Self-determined 自選		<input type="checkbox"/> Benefit plan code : 01 權益計劃編號 : 01 (e.g. 例如 : Manager 經理)	<input type="checkbox"/> Benefit plan code : 02 權益計劃編號 : 02 (e.g. 例如 : Officer 主任)	<input type="checkbox"/> Benefit plan code : 03 權益計劃編號 : 03 (e.g. 例如 : Clerk 文員)	
< 5 years 年	5%	< years 年	%	%	%	%	
5 to 至 < 10 years 年	7.5%	to 至 < years 年	%	%	%	%	
> = 10 years 年	10%	> = years 年	%	%	%	%	

PART B: WITHDRAWAL METHODS 第二部分：提取方法^[377]

Please select one of the following 請選擇下列一項：

- Benefits derived from employer's voluntary contributions x Default vesting scale^[WVSV] (see below Table B)
僱主自願性供款之累算權益 x 預設權益歸屬比例^[WVSV] (請參閱表B)
- Benefits derived from employer's voluntary contributions x Self-determined vesting scale^[WVSV] (please complete Table B)
僱主自願性供款之累算權益 x 自選權益歸屬比例^[WVSV] (請填寫表B)

If space of Table B is insufficient, please provide your self-determined vesting scale in our prescribed format as per Table B below on a separate sheet.
如表B空位不敷應用，請另紙提供閣下之自選權益歸屬比例，但必須如表B之格式。

Table B 表B (vesting percentage should be in increments of 10% 權益歸屬百分比必須為10%的倍數)

Vesting Scale 權益歸屬比例 (tick one only 只須選擇一項) Completed years of service 服務年資(DOE)## Completed years of scheme service 計劃服務年資(DOP)##	Default Vesting Percentage (%) 預設權益歸屬百分比	Self-determined Vesting Percentage (%) 自選權益歸屬百分比	Determine benefit plan for various groups/grades 介定不同組別/級別人士之權益計劃		
	<input type="checkbox"/> DOE <input type="checkbox"/> DOP	<input type="checkbox"/> DOE <input type="checkbox"/> DOP	(01) <input type="checkbox"/> DOE <input type="checkbox"/> DOP	(02) <input type="checkbox"/> DOE <input type="checkbox"/> DOP	(03) <input type="checkbox"/> DOE <input type="checkbox"/> DOP
Less than 1 少於一年	0				
1, but less than 2 一年，但少於兩年	0				
2, but less than 3 兩年，但少於三年	0				
3, but less than 4 三年，但少於四年	30				
4, but less than 5 四年，但少於五年	40				
5, but less than 6 五年，但少於六年	50				
6, but less than 7 六年，但少於七年	60				
7, but less than 8 七年，但少於八年	70				
8, but less than 9 八年，但少於九年	80				
9, but less than 10 九年，但少於十年	90				
10 or more 十年或以上	100				

Notes on payment of Employer's Voluntary Balance 僱主支付自願結餘備註

- If the cessation of an employee's employment is due to any of the following, the Trustee shall pay the employee (or personal representative on the death of employee) 100% of the Employer's Voluntary Balance:
- normal retirement (i.e. reached age 65, or such other age as specified by the employer)
- early retirement (i.e. age over 60 and under 65, or such other age as specified by the employer)
- remains in service with the consent of the company after normal retirement date and retires subsequently
- total incapacity as certified by a registered medical practitioner
- death
- If the cessation of an employee's employment is due to summary dismissal, he/she shall not be entitled to receive the Employer's Voluntary Balance.
- If the cessation of an employee's employment is due to a reason not specified above, the Trustee shall pay the employee according to the withdrawal method selected in Part B above
- Unvested Benefits will be used to offset future contributions.

Remarks:

"Years of scheme service" means the period of membership of the employee from the date of participation in the company's retirement scheme to the date of cessation of the company's retirement scheme membership in completed years.

If the employer does not make the choice here, completed years of service will be used in determining the contribution rate and vesting scale.

- 若僱員因下列原因離職，受託人將支付百分之百之僱主自願結餘予該僱員 (或死者之合法代理人)：
- 到達正常退休年齡 (即年滿65歲或僱主指定的其他年齡)
- 提早退休 (即60歲以上及65歲以下或僱主指定的其他年齡)
- 到達正常退休日後經公司同意下繼續留任，並延遲退休
- 由註冊醫生證明該成員完全喪失行為能力
- 死亡
- 若僱員因犯錯而遭即時解僱，他/她將不合資格領取僱主自願結餘。
- 若僱員因上述以外之原因離職，受託人將按僱主於第二部分所選擇之提取方法支付予有關成員。
- 僱員離職時未能享有之僱主供款將用作抵銷未來供款。

備註：

「計劃服務年資」是指由僱員參與公司退休計劃日起至終止參與有關計劃之時段 (按整年計算)。

若僱主不作出揀選，「服務年資」將被用作釐訂自願性供款率及權益歸屬比例。

Print Name 姓名： _____

Date 日期： _____

ccyy 年 / mm 月 / dd 日

Authorized Signature and Company Chop*
授權人簽署及公司印鑑*

* For Sole Proprietorship or Partnership business, this part must be signed by the Sole Proprietor or any one of the Partners.
如屬獨資經營公司或合夥經營公司，必須由獨資經營者或任何一位合夥人簽署。