

MPF ADMINISTRATION CHECKLIST

Have you done the following?

New employees enrolment

- enrol them in AIA MPF scheme within the first 60 days of their employment
- complete and sign the **Member Enrolment Form**, and send the forms and new member list (if applicable) to AIA MPF
- update your payroll system (if applicable)
- keep copies of the forms/list for records

Making contributions

- make mandatory contributions for employees AND submit contribution data/Remittance Statement (on or before the contribution day, usually the 10th of each month)
- issue pay records to employees within 7 working days after making contributions

End of employment

- On or before the 10th of the month following the month when the employment ends:
 - provide leaving employees with the **Scheme Member's Request for Fund Transfer Form [Form MPF(S)-P(M)]**
 - submit the Remittance Statement with relevant sections completed or Notification of Member Termination, AND
 - pay the final contributions for leaving employees
- Send a written request to AIA MPF to check the leaving employees' accrued benefits derived from your contributions including any claimed amount, for the arrangement of LSP/SP reimbursement

Record maintenance

- keep contribution records, e.g. Remittance Statements, for 7 years
- keep relevant income details for employees for 6 months (including amount, breakdown and payment dates)
- keep details of terminated employees for 6 months (including name, address and employment period)

Others

- notify AIA MPF of amendments to company particulars within 30 days of change (including company name, address, phone/fax no.)
- distribute Member's Guides and member benefit statements to employees within 7 working days after you receive them from AIA MPF (if applicable)

USEFUL GUIDELINES

Guidelines on filling out employer forms	Available at
Remittance Statement (for existing members)	mpf.aia.com.hk
Remittance Statement with pre-filled information (for existing members)	➔ Help & Support
Remittance Statement (for new enrolled members)	➔ Forms & Guides
Remittance Statement with pre-filled information (for new enrolled members)	➔ Employer
Advice for Electronic Submission	➔ MPF
Claim Form for Reimbursement of Long Service Payment/ Severance Payment	➔ Guides
Form for Changes of Employer Particulars and/or Scheme Governing Rules	
Guidelines on filling out member forms	Available at
Member Enrolment Form	mpf.aia.com.hk
	➔ Help & Support
	➔ Forms & Guides
	➔ Employer
	➔ MPF
	➔ Guides
Investment Mandate Form	mpf.aia.com.hk
	➔ Help & Support
	➔ Forms & Guides
	➔ Employee
	➔ MPF
	➔ Guides
Guidelines on reading the Statements of Account	Available at
Member Quarterly Benefit Statement	mpf.aia.com.hk
Member Annual Benefit Statement	➔ Help & Support
	➔ Forms & Guides
	➔ Employee
	➔ MPF
	➔ Guides

USEFUL FORMS

Employer

	Available at	Submission Channel	
		By Post (with original signature)	By Fax
Application			
Employer Application Form • Appendix A (Group Companies) • Appendix B (Voluntary Contribution and Withdrawal Method) • Appendix C (Transfer of Asset)	mpf.aia.com.hk ➔ Help & Support ➔ Forms & Guides ➔ Employer ➔ MPF	✓	X
Authorized Signatory List	➔ Forms	✓	X
Monthly contributions and reporting			
Direct Debit Authorization		✓	X
Advice for Electronic Submission	mpf.aia.com.hk ➔ Help & Support	✓	X
Application Form for Online MPF Data Submission Service	➔ Forms & Guides ➔ Employer ➔ MPF	✓	✓
Remittance Statement (Existing Members)	➔ Forms	✓	✓
Remittance Statement (New Enrolled Members)		✓	✓
Others			
Form for Changes of Employer Particulars and/or Scheme Governing Rules		✓	✓
Request Form for Personalized Services	mpf.aia.com.hk ➔ Help & Support	✓	X
Notification of MPF Scheme Member Termination	➔ Forms & Guides ➔ Employer ➔ MPF	✓	X
Claim Form for Reimbursement of Long Service Payment/Severance Payment	➔ Forms	✓	X

USEFUL FORMS

Member

	Available at	Submission Channel	
		By Post (with original signature)	By Fax
Enrolment and account maintenance			
Member Enrolment Form	mpf.aia.com.hk ➔ Help & Support ➔ Forms & Guides ➔ Employer ➔ MPF ➔ Forms	✓	X
Investment Mandate Form	mpf.aia.com.hk ➔ Help & Support ➔ Forms & Guides ➔ Employee ➔ MPF ➔ Forms	✓	✓
Member Record Maintenance Form		✓	✓
Scheme Member's Request for Account Consolidation Form		✓	X
Scheme Member's Request for Fund Transfer Form		✓	X
Claims for MPF benefits			
Claim Form for Payment of Accrued Benefits on Ground of Attaining the Retirement Age of 65 or Early Retirement	mpf.aia.com.hk ➔ Help & Support ➔ Forms & Guides ➔ Employee ➔ MPF ➔ Forms	✓	X
Claim Form for Payment of Accrued Benefits on Ground of Permanent Departure from Hong Kong / Total Incapacity / Terminal Illness / Small Balance / Death		✓	X
Statutory Declaration for Claims for Payment of Accrued Benefits on Grounds of Early Retirement		✓	X
Statutory Declaration for Claims for Payment of Accrued Benefits on Grounds of Permanent Departure from Hong Kong		✓	X
Statutory Declaration for Claims for Payment of Accrued Benefits from Small Balance Accounts		✓	X
Certificate of a Person's Permanent Unfitness for a Particular Kind of Work		✓	✓
Certificate of a Person Having a Terminal Illness		✓	✓

EMPLOYER HOTLINE: 2100 1888

Quick Access:

What do you want to know?	After selecting your language (1. Cantonese; 2. English; 3. Mandarin), press...
Contribution enquiry	1 → 2 → Enter plan no. and password → 2
Speak to a Customer Service Representative (general)	1 → 1 → 9

