

我的強積金計劃
MY CHOICE MANDATORY PROVIDENT FUND SCHEME
客戶轉介表格
CUSTOMER REFERRAL FORM

(I) 客戶資料

PART I: CUSTOMER INFORMATION

轉介客戶類別 Customer Nature:			
<input type="checkbox"/> 僱主 Employer	<input type="checkbox"/> 自僱人士 Self-Employed Person	<input type="checkbox"/> 個人帳戶成員 Personal A/C Member	<input type="checkbox"/> 特別自願性供款成員 SVC Member
客戶中文姓名 Chinese Name _____		客戶英文姓名 English Name _____	
聯絡人姓名 Contact Person's Name _____		職銜 Title _____	
電話號碼 Tel No. _____		傳真號碼 Fax No. _____	

(II) 轉介人資料

PART II: REFERRER INFORMATION

轉介人中文姓名 Referrer's Chinese Name _____	英文姓名 English Name _____
強積金中介人註冊編號 MPF Registration No. _____	理財顧問號碼 Financial Consultant Code _____
電話號碼 Tel No. _____	電郵地址 E-mail Address _____

(III) 聲明及簽署



PART III: DECLARATION

本人，即以下簽署的客戶，明白和同意：

1. 按本人要求，以下簽署的轉介人(「轉介人」)將轉介本人到中銀國際英國保誠信託有限公司(「中銀國際英國保誠信託」)，其目的為使中銀國際英國保誠信託介紹我的強積金計劃(「計劃」)及/或提供有關計劃的資料予本人；
2. 中銀國際英國保誠信託收到這份客戶轉介表格後，將直接就前述目的與本人聯絡，並直接提供日後的服務；
3. 於本客戶轉介表格收集的個人資料(i) 將被轉介人，英國保誠保險有限公司及中銀國際英國保誠信託作前述轉介及與計劃有關的任何通訊之用；及(ii) 將不會被轉移給任何其他第三者。在個人資料(私隱)條例下，本人有權要求查閱及改正任何本人提供予中銀國際英國保誠信託的個人資料。本人可以書面形式向中銀國際英國保誠信託資料保障主任作出有關要求，地址為香港銅鑼灣威非路道 18 號萬國寶通中心 12 字樓；
4. 中銀國際英國保誠信託會就前述轉介，向轉介人及英國保誠保險有限公司支付轉介費；
5. 轉介人是英國保誠保險有限公司的理財顧問；及
6. 以下簽署的客戶及轉介人均須簽署這份客戶轉介表格。

I, the undersigned customer, understand and agree that:

1. Upon my request, the undersigned referrer ("Referrer") will refer me to BOCI-Prudential Trustee Limited ("BOCI-PRU Trustee") for the purposes of BOCI-PRU Trustee introducing My Choice Mandatory Provident Fund Scheme ("the Scheme") and/or providing information in relation to the Scheme;
2. BOCI-PRU Trustee will contact me directly for the said purposes after receiving this Customer Referral Form and service me directly thereafter;
3. Personal information collected in this Customer Referral Form (i) will be used by the Referrer, The Prudential Assurance Company Limited, and BOCI-PRU Trustee for the purposes of the said referral and any communication in relation to the Scheme; and (ii) will not be transferred to any other third party. Under the Personal Data (Privacy) Ordinance, I have the right to request access to and correction of any personal information that I provide to BOCI-PRU Trustee. I may make such request by writing to the Data Protection Officer of BOCI-PRU Trustee at 12/F, Citicorp Centre, 18 Whitfield Road, Causeway Bay, Hong Kong;
4. As a result of the said referral, BOCI-PRU Trustee will pay referral fees to the Referrer and The Prudential Assurance Company Limited;
5. The Referrer is a financial consultant of The Prudential Assurance Company Limited; and
6. Both the undersigned customer and the Referrer are required to sign this Customer Referral Form.

<p>客戶簽署及公司印章 (如適用) Customer's Signature & Co. Chop (if applicable)</p>  <p>日期 Date _____</p>	<p>轉介人簽署 Referrer's Signature</p>  <p>日期 Date _____</p>
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