

# Hong Kong Baptist University

Deferred withdrawal of benefits arrangement for  
Superannuation Fund Members

# Deferred Withdrawal of Benefits Arrangement

## Purpose

To provide an option for retiring Fund Members to maintain their Fund Memberships upon retirement from the University for a pre-determined period to meet their needs.

## Eligible for all retiring Fund Members

- No Benefits Payment Option Form nor Minimum MPF Benefits Transfer Instruction Form are to be completed
- You **MUST** complete the below document(s):

### All retiring Fund Members

- (A) Deferred Withdrawal of Benefits Application Form;

### Post Full or Limited Fund Members

Either:

- (B) the “Statutory Declaration for Claims for Withdrawal of Minimum MPF Benefits on Ground of Early Retirement” and the “Claim Form for Withdrawal of Minimum MPF Benefits from MPF exempted ORSO registered scheme”, if you are under the age of 65; **OR**
- (C) The “Claim Form for Withdrawal of Minimum MPF Benefits from MPF exempted ORSO registered scheme” if you are age 65 or above.

## (A) Deferred Withdrawal of Benefits Application Form

- The Deferred Withdrawal of Benefits Application Form must be submitted to the Finance Office (FO)

**1 month** before your last working day or last pay day, whichever earlier, together with, if applicable:

1a. the “Statutory Declaration for Claims for Withdrawal of Minimum MPF Benefits on Ground of Early Retirement” and the “Claim Form for Withdrawal of Minimum MPF Benefits from MPF exempted ORSO registered scheme” if you are under the age of 65; **OR**

1b. the “Claim Form for Withdrawal of Minimum MPF Benefits from MPF exempted ORSO registered scheme” if you are age 65 or above; **AND**

2. Deposit slip of the administration fee HK\$5,000 paid to the University

# (A) Deferred Withdrawal of Benefits Application Form

## 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")

#### DEFERRED WITHDRAWAL OF BENEFITS APPLICATION FORM

#### 延遲提取權益申請表格

##### Important Notes 重要事項：

1. Please read the following Terms and Conditions carefully before completing this form. 填寫此表格前，請先細閱條款。
2. Please clearly mark and counter-sign all amendments in the input boxes provided. 請在提供的輸入框中清楚地標記，如有任何刪改，必須清楚註明並在旁加簽。
3. Your contact information provided hereunder will supersede previous record(s) and will be updated to the corporate trustee, Bank Consortium Trust Company Limited ("BCTC")'s system. 您在此處提供的聯絡資料將自動更新並取代公司信託人—銀聯信託有限公司(銀聯信託)現有系統的紀錄。
4. Please complete, sign and submit this form to the Payroll Section of the Finance Office via campus mail (Attention to Payroll Section/FO) or send a scanned copy via email to foformssubmit@hkbu.edu.hk at least one month before your last day of service (either your last working day at the Hong Kong Baptist University ("University") or your last pay day, whichever is the earlier). 請將此表格填妥及簽署，並於離職前最少一個月（即您在香港浸會大學（“大學”）的最後一個工作天或您的最後薪金支付日，以較早者為準）通過校園郵遞交回財務處-薪俸組或通過電子郵件將掃描文件發送至 foformssubmit@hkbu.edu.hk。
5. If you have any questions when completing this form, please contact the Finance Office's Hotline at ext. 2404. 如您填寫表格時有任何疑問，請致電成員熱線分機 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 ID 員工號碼	Contact Phone Number 聯絡電話號碼	Mobile Phone Number 手提電話號碼	Personal Email Address 個人電郵地址
Your Personal Correspondence Address (all correspondence will be sent to the following address) 個人通訊地址 (所有通訊將寄往以下地址)				

\* Delete as appropriate 請刪去不適用者

## (A) Deferred Withdrawal of Benefits Application Form

➤ Make sure you understand the terms and conditions before you submit the form

	Items	Terms and Conditions
1.	Eligibility	Retiring Fund Members only
2.	Membership Type	Deferred Members
3.	Effective Date	On the first day of the month following the last pay month
4.	Deferred Withdrawal Period	A maximum of five (5) years
5.	Operation of the Deferred Membership Account	<ul style="list-style-type: none"><li>• No University, Staff or Voluntary contributions will be allowed</li><li>• Access to BCT's members' portal and fund administrative services remain unchanged</li><li>• Partial withdrawal of benefits in a multiple of 10% can be made once a month</li></ul>

## (A) Deferred Withdrawal of Benefits Application Form

	Items (Cont'd)	Terms and Conditions
6.	Fees, rebates and distribution	<ul style="list-style-type: none"><li>• A one-off administrative fee of HK\$5,000 is charged to the Deferred Members for the covering of administrative costs during the Deferred Withdrawal Period</li><li>• A withdrawal fee of HK\$300 is currently charged by the corporate trustee and is subject to change from time to time</li><li>• Same as existing Fund Members, Deferred Members are:<ul style="list-style-type: none"><li>• - subject to management fees which are absorbed by the underlying investments of the Fund; and</li><li>• - entitled to management fee rebates</li></ul></li><li>• Deferred Members are NOT entitled to distribution of the surpluses of the Fund, if any.</li></ul>

## (A) Deferred Withdrawal of Benefits Application Form

	Items (Cont'd)	Terms and Conditions
7.	Deemed liquidation of holdings	<p>Deemed liquidation of Deferred Members' accounts upon the occurrence of following events:</p> <ul style="list-style-type: none"><li>i. the expiration of the Deferred Withdrawal period; or</li><li>ii. the death or bankruptcy of the Deferred Member; or</li><li>iii. the termination or winding up of the Fund, whichever is earlier.</li></ul>
8.	Cessation of Membership	Deferred Members shall cease to be a Deferred Member upon full withdrawal of their accrued benefits



## (B) & (C) Statutory Declaration and Claim Forms

### ➤ POST Full and Limited Fund Members

#### ➤ Age under 65

Statutory Declaration for Claims for Withdrawal of Minimum MF Benefits on Ground of Early Retirement; and

the Claim Form for Withdrawal of Minimum MPF Benefits from MPF exempted ORSO registered scheme

#### ➤ Age at 65 or above

Claim Form for Withdrawal of Minimum MPF Benefits from MPF exempted ORSO registered scheme

## Hotline

- Fund Administrator  
Bank Consortium Trust Company Ltd - 2298 9088
  
- Finance Office (Super'n Fund enquiry) - Ext. 2404  
- fopayrollrb@hkbu.edu.hk
  
- Submission of forms to Finance Office  
(via email) - foformssubmit@hkbu.edu.hk