

Fidelity Retirement Master Trust

eMPF Platform
Scheme Member Session
eMPF Registration and Supporting channels



Points to note for this seminar

1. This introduction only shows some functions of the eMPF Platform.
2. The platform functions and screenshots shown in this seminar are not the finalized version. The eMPF platform may make fine-tuning from time to time to optimize its functions, and the actual operating interface may have the opportunity to be adjusted.

1. Introduction to the eMPF Platform
 2. Important Dates and Required Actions for Scheme Members
 3. eMPF Member Portal - Features Overview
 4. eMPF Member Portal – Features Demonstration
 5. Supporting channels to Members and Employers
 6. Q&A
-

1. Introduction to the eMPF Platform

What is the eMPF Platform?

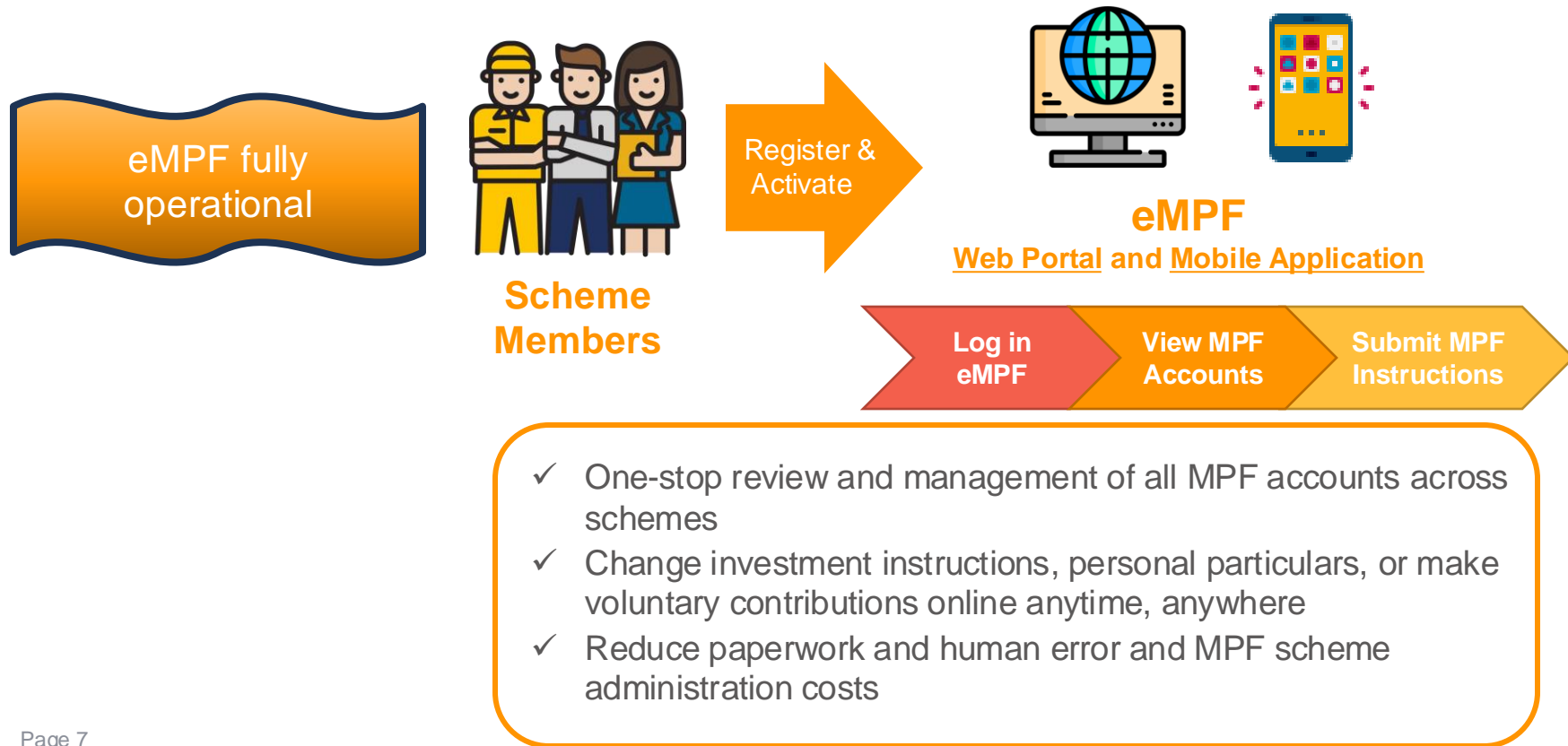


- ✓ One-stop electronic platform for MPF scheme administration
- ✓ Enabling employers and scheme members to manage their MPF faster and easier
- ✓ eMPF Company is a wholly-owned subsidiary of the MPFA for operating the eMPF Platform, as a non-profit public utility

Comparison of the operating models

Current Situation	After Onboarding to eMPF
<ul style="list-style-type: none"> Submit instructions to different scheme trustees 	<ul style="list-style-type: none"> Even if there are different schemes, scheme members can submit all administration instructions through the eMPF Platform
<ul style="list-style-type: none"> Having multiple login for trustee's administration system, based on number of MPF scheme 	<ul style="list-style-type: none"> Simply register once for eMPF to review and manage your MPF accounts
<ul style="list-style-type: none"> The account balance is scattered, making it difficult to plan for retirement 	<ul style="list-style-type: none"> Gain control of your total retirement savings in one platform to enhance your retirement planning intent and efficiency

Onboard to the eMPF Platform benefits Scheme Members



2.Important Dates and Required Actions for Scheme Members

Attention to Scheme Members

Before your scheme is onboarded to the eMPF Platform, please ensure that **your name, date of birth, and identity card number** in the trustee's record match both your identity cards and MPF provider records. Inconsistencies may result in the creation of **multiple eMPF Login IDs**, making account management more difficult.

If discrepancies are found, please complete the **Change Of Particulars For Members Form** and submit it with supporting documents to Fidelity Retirement Master Trust's administrator HSBC Institutional Trust Services (Asia) Limited ("HTHK") on or before 6:00pm on **12th December 2025**.



Notes to Members before onboarding to eMPF Platform



After receiving
communication pack

1

Take note on the confirmed onboarding date **(30th December 2025)**

2

Register eMPF

We suggest members can register eMPF after receiving the communication pack, while the account details will only be available on the eMPF Platform after the relevant schemes have got onboard the eMPF Platform.

3

Operational arrangements during the Scheme Onboarding

Each scheme takes several days to be transferred to eMPF Platform. There will be early cut-off dates for administrative instructions for the relevant MPF accounts.

On or after the onboarding date, administrative instructions for relevant MPF schemes are processed via eMPF Platform (Web Portal/Mobile Application).

Note

Each trustee will set different cut-off dates for different MPF instructions. Employees should pay attention to the notice issued by the trustee and submit the necessary instructions before the cut-off dates.

Notes to Members before onboarding to eMPF Platform



After receiving communication pack

Instructions	Received by HTHK on or before 6:00 pm of the day unless otherwise specified
Members (including Employee Members, SEP, Personal Account Members, TVC Members and SVC Members)	
Switching (Cut-off date for the receipt of paper form/instruction received from phone-in)	4:00 pm, 17 December 2025
Change of investment Mandate (Cut-off date for the receipt of paper form/instruction received from phone-in)	4:00 pm, 17 December 2025
Contribution (Regular contribution (cut-off date for the receipt of paper form))	10 December 2025
Contribution (SEP relevant income declaration (cut-off date for the receipt of paper form))	12 December 2025
Transfer-in (A valid instruction to request transfer out trustee to process transfer request must be received by (cut-off date for the receipt of valid Fund Transfer Forms via physical channel))	9 December 2025
Transfer-out (A valid transfer out instruction must be received by the Trustee via transfer-in Trustee)	9 December 2025
Withdrawal of accrued benefits (Permanent departure (cut-off date for the receipt of paper form))	4 December 2025
Withdrawal of accrued benefits (Other circumstances (cut-off date for the receipt of paper form))	9 December 2025
Member enrolment (Cut-off date for the receipt of paper form)	12 December 2025
Member information change (Cut-off date for the receipt of paper form)	12 December 2025
DDA (Set up new DDA instruction (cut-off date for the receipt of paper form))	12 December 2025
DDA (Change of bank account or information (cut-off date for the receipt of paper form))	12 December 2025

Please note:

Other than fund switching and change of investment mandate instructions, any instruction received by HTHK after the relevant cut-off date as indicated above and before the Onboarding Date will be transferred to the eMPF Platform on the Onboarding Date for processing. Fund switching and change of investment mandate instructions received by HTHK after the relevant cut-off date as indicated above and before the Onboarding Date will be rejected. Members will need to submit the fund switching and change of investment mandate instructions on the eMPF Platform again on or after the Onboarding Date.

Notes to Members before onboarding to eMPF Platform (Cont)

	Fidelity Retirement Master Trust
Digital Service Channel	Cut-off time - Received by HTHK on or before:
Mobile application	6:00 pm, 9 December 2025 (TVC transfer-in)
	6:00 pm, 10 December 2025 (TVC enrolment)
	6:00 pm, 10 December 2025 (TVC contribution)
	6:00 pm, 17 December 2025 (Opt-in/out for direct marketing and e-statement)
	6:00 pm, 4 December 2025 (Withdrawal of accrued benefits - new standing instruction set up)
	6:00 pm, 9 December 2025 (Withdrawal of accrued benefits - normal/early retirement)
	4:00 pm, 17 December 2025 (Switching and change of investment mandate)
	6:00 pm, 17 December 2025 (Member information change)
Member website	6:00 pm, 17 December 2025 (Opt-in/out for direct marketing and e-statement)

Please note:

Other than fund switching and change of investment mandate instructions, any instruction received by HTHK after the relevant cut-off date as indicated above and before the Onboarding Date will be transferred to the eMPF Platform on the Onboarding Date for processing. Fund switching and change of investment mandate instructions received by HTHK after the relevant cut-off date as indicated above and before the Onboarding Date will be rejected. Members will need to submit the fund switching and change of investment mandate instructions on the eMPF Platform again on or after the Onboarding Date.

Overview of Communication Pack



Dear Sir/Madam,

Embrace your new digital MPF experience through the eMPF Platform

eMPF Platform Company Limited (eMPF Company)¹ and HSBC Provident Fund Trustee (Hong Kong) Limited (HPFT) invite you to embrace the new digital MPF experience through the eMPF Platform (eMPF).

What's in it for me?

The eMPF is a centralized electronic platform and your one-stop online hub for managing your MPF anytime anywhere through mobile app or web portal. Whether you are a scheme member, an employer or a self-employed person, the eMPF will bring your MPF experience to a whole new level. The eMPF will bring you benefits which include:

Scheme Members and Self-employed Persons

- For MPF accounts which have got onboarded the eMPF:
 - View account balance and manage all accounts via a one-stop app/portal
 - Consolidate accounts and switch investment choices anytime anywhere
 - Make voluntary contributions in a breeze
 - Apply for withdrawal of MPF under different MPF schemes in one go



Employers and Self-employed Persons

- Make MPF contributions with different e-payment options
- Automate calculation of contributions
- Receive e-reminders of contribution due dates
- Reduce paper work and human errors



When can I start using the eMPF?

MPF trustees and their schemes have been getting onboard the eMPF in sequence one by one (details @www.empf.org.hk). Information of accounts under HPFT's **Fidelity Retirement Master Trust** will be transferred to the eMPF from the following date²:

Fidelity Retirement Master Trust: Target eMPF Onboarding Date 30 December 2025

From this date onward, information and records of your MPF account under this scheme will be transferred to the eMPF. While HPFT remains the trustee of the scheme, eMPF Company will utilize the eMPF to perform the administration of the MPF scheme, provide scheme administration services³ to you and handle your service instructions (including making contributions, changing investment choices, checking account balance and withdrawing MPF, etc.). From then on, you can manage your MPF on the eMPF and should no longer submit scheme administration service instructions to HPFT.

Register with eMPF

Starting from 1 October 2025, simply complete the one-time registration with eMPF to enjoy the benefits it brings to you. Please see back page for the **Scheme Member eMPF Registration User Guide and Messages from Your Trustee** to kick-start your new digital MPF journey! If you hold another MPF account which has got onboarded the eMPF and has already registered with eMPF earlier, you do not need to register again.

Enquiries

For enquiries, please call the eMPF Customer Service Hotline at **183 2622**. We look forward to serving you on the eMPF.

eMPF Company
and HPFT

	Item	Format
1	Letter to Employers and Members	QR Code
2	Notice to Participating Employers and Scheme Members	
3	eMPF Registration and Activation User Guide	
4	FAQs	
5	Personal Information Collection Statement (PICS)	

Messages from Your Trustee

Starting from 30 December 2025, the eMPF Company will take up the administration of the MPF scheme and provide scheme administration services to you via the eMPF, including handling service instructions from scheme members, employers and self-employed persons. Hence, you should submit scheme administration service instructions directly to the eMPF instead of HPFT.

HPFT will cease accepting scheme administration service instructions based on different cut-off dates. Please read the **Notice to Participating Employers and Scheme Members** for details.



Notice to Participating Employers and Scheme Members
<https://www.fidelity.com.hk/static/hong-kong/pdf/empf/2025-fidelity-empf-notice-en.pdf>

Service instructions received by HPFT after the respective cut-off dates will be processed by the eMPF after the scheme has got onboarded the eMPF on 30 December 2025.

- Trustee HSBC Provident Fund Trustee (Hong Kong) Limited distributes the Communication Pack to all scheme members starting from **October 2025**.
- Scheme members can start registering for the eMPF Platform website.
- Please note the member account details will only be displayed starting from the onboarding date.

¹ eMPF Company is a wholly-owned subsidiary of the Mandatory Provident Fund Schemes Authority. It operates the eMPF as a not-for-profit public utility.

² The date of onboarding the eMPF is subject to the legal notice published in the Gazette of the Government of the Hong Kong Special Administrative Region. In case of subsequent adjustment, your trustee will promptly communicate with you.



³ The use of the eMPF and scheme administration services are subject to the General Terms and Conditions of the eMPF which are available at www.empf.org.hk/tc/en.

Trustee onboarding date and instructions cutoff dates

Trustee	MPF Scheme	Onboarding Date	Matters and Activities that are to be conducted by the eMPF Platform	Instructions cutoff dates
HSBC Provident Fund Trustee (Hong Kong) Limited	Fidelity Retirement Master Trust	30th December 2025	<ul style="list-style-type: none"> processing registration of eMPF Platform for participating employers and scheme members; processing enrolment in registered schemes for participating employers and scheme members; processing MPF contributions and default contributions; processing scheme members' investment instructions (including investment instructions on new contributions and switching instructions); processing transfers of benefits within the registered scheme or between registered schemes or from occupational retirement schemes to registered schemes; processing claims and withdrawal of MPF benefits; processing the offset and refund of severance payments and long service payments to participating employers and/or scheme members/claimants; processing of changes of participating employer and scheme member particulars; giving of notices and documents to participating employers and scheme members; handling of enquiry and complaint; and following up with participating employers and scheme members on any unclear scheme administration instructions. 	*Please refer to the Communication Pack mailed out by Trustee starting from October 2025

- When the Fidelity Retirement Master Trust onboarded to the eMPF platform, **administrative services of the Scheme will be performed by the eMPF Platform** instead of HTHK
- Scheme member could **manage, or submit instructions** for their Scheme member account via eMPF Platform
- After onboarding date, HTHK will no longer be the scheme administrator for Fidelity Retirement Master Trust
- , members are reminded to submit instruction to eMPF Platform instead of HTHK

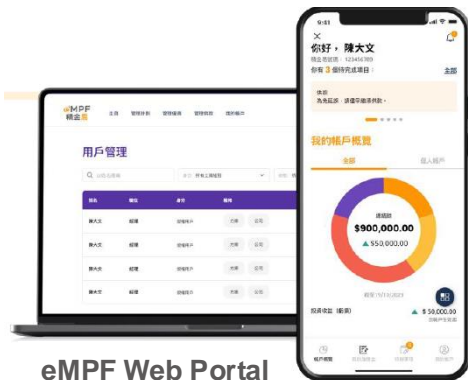
Actions to be taken by Members

	Item	Details	Actions
(1)	eMPF Member Registration (apply to ALL members)	<ul style="list-style-type: none"> Scheme member could register as eMPF Member in order to manage, or submit instructions for their MPF Scheme member account via eMPF Platform Once Fidelity Retirement Master Trust onboarded, member could view their account details via eMPF Member Portal (Web/Mobile) 	<ol style="list-style-type: none"> Scan the QR codes below to perform eMPF Registration <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  <p>eMPF Web</p> </div> <div style="text-align: center;">  <p>eMPF Mobile App</p> </div> </div> Visit eMPF Public Website starting from December 2025 : https://www.empf.org.hk/

Actions to be taken by Members

	Item	Details	Actions
(2)	Submit administration instructions and enquiring MPF account details	<ul style="list-style-type: none"> Starting from 30th December 2025, Fidelity Retirement Master Trust member could submit MPF administration instruction via eMPF Web Portal / Mobile App All MPF administration forms will be able to downloaded at eMPF Public Website (www.empf.org.hk), or obtain them in eMPF Service Centres eMPF Platform will handle the relevant MPF administration instruction, enquiries and follow-up matters. Please note that original MPF administration instruction method offered by trustee may be delayed or rejected 	<p>Visit eMPF Public Website to view the eMPF User guide / tutorial video</p> <p>https://www.empf.org.hk/tutorial/member/</p>
(3)	Submitting Contribution data & Payment instruction (Applicable to TVC, SVC & SEP account holder)	<ul style="list-style-type: none"> Starting from 30th December 2025, Fidelity Retirement Master Trust member could submit Contribution Data and Payment instruction via eMPF Web Portal / Mobile App Cash Payment will not longer be accepted by eMPF Platform. Scheme member could submit the paper cheque to dropbox in eMPF Service Centre, or pay by available electronic payment method 	<p>Visit eMPF Public Website for payment methods offering by Fidelity Retirement Master Trust</p> <p>https://www.empf.org.hk/page/paymentMethods</p>

Online Submission (*Suggested)



eMPF Web Portal

eMPF Mobile App

Submitting Standardized administration forms



Email

(forms@support.empf.org.hk)



Fax

(3197 2988)



Mail

(Address: PO Box 98929,
Tsim Sha Shui Post Office)



In person

Dropbox within three
eMPF Service Centre

3. eMPF Member Portal Features Overview

Functionality of the eMPF Platform



Account Registration and Enrolment

- eMPF Registration
- Enrolment of other accounts



Notices, Documents and Reports

- Notices and Documents
- MPF Member Benefit Statement



Contribution Processing

- Calculate and submit mandatory contributions
- Calculate and submit voluntary contributions
- Diversified payment methods



Manage MPF Account

- Fund switching
- Transfer of MPF account
- Change of personal particulars



Withdrawal of MPF

- Withdraw MPF benefits

eMPF 積金易

Covers all MPF scheme administrative procedures

Key Features for Scheme Members



Web Portal



Mobile App

✓ **Digitalize** all administrative procedures

eMPF Platform covers all MPF scheme administrative procedures, and all instructions that used to be paper-only can be **submitted online**.

✓ **Provide Web Portal and mobile application**

Web Portal and mobile application provide the same functionality for members to use in various situations.

4. eMPF Member Portal Features Demonstration

Member Portal Features Demonstration

a

eMPF Registration

b

eMPF Login

c

Change of Personal Details

d

Consolidating Accounts /
Transferring MPF Arrangement

e

Change of Investment
Instruction

f

Notification and Action
items

g

MPF Statements

Member Portal

a. eMPF Registration



Register for eMPF in three steps

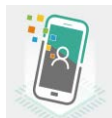
1 Identity Authentication

2 Fill in the profile

3 Account Activation

Registration preparation

If using "iAM Smart" for verification



Personal Mobile Device

(With "eMPF" and "iAM Smart" apps installed)

If using "e-Identity Verification" for verification



Personal Mobile Device

(With "eMPF" app installed)

HKID Card

First-time user to register for eMPF

If scheme members have not yet registered for eMPF, they can download the eMPF mobile app and choose to register as a member.

“Member” refers to :

- Regular Employees
- Casual Employees
- Self-employed Persons
- Personal account holders (TVC, SVC inclusive)

Register your eMPF Account

It takes only a few steps to create your eMPF account. Please select your role.




Member


Applicable to all MPF scheme members, including persons who opt to make tax-deductible voluntary contributions and special voluntary contributions, such as:


- Regular employees
- Casual employees
- Self-employed persons
- Personal account holders


First-time user to register for eMPF


If scheme members have not yet registered for eMPF, they can download the eMPF mobile app and choose to register as a member.

 **Member Registration**

 Passport scanning and facial recognition. or by logging in to "iAM Smart".

 [Watch Tutorial video](#)

**Step 2 Fill in Personal Information**
Provide your personal details and choose the way of communication.

**Step 3 Activate your Account**
Set up your username and password.

Required Items
Before your start, please prepare the following items to ensure a smooth registration process:

- ✓ Your identity document
- ✓ Mobile phone (to receive the one-time passcode for verification and activate your account through mobile app if applicable)
- ✓ Installed "iAM Smart" mobile app (optional)

[Start Registration](#)

1 Identity Authentication

2 Fill in the Profile

3 Account Activation

Select an authentication method :
"e-Identity Verification" or "iAM Smart"

"e-Identity Verification" tips :

- ✓ "e-Identity verification" is for authentication by scanning Hong Kong Identity Card and facial recognition



e-Identity Verification

Authenticate by performing HKID Card/
Passport scanning and facial recognition

"iAM Smart" tips :

- ✓ If you have registered as a user of "iAM Smart", you are recommended to use "iAM Smart" for verification, which is simple and fast
- ✓ "iAM Smart" can also be used as a way to log in to the eMPF Platform in future



"iAM Smart"

Authenticate by logging in to "iAM Smart"

1 Identity Authentication

2 Fill in the
Profile

3 Account
Activation

If using "iAM Smart" for verification

If choosing "**iAM Smart**", You will be redirected to the "**iAM Smart**" Mobile App to continue your identity verification process.

Once you have successfully authenticated the connection, please proceed with the registration through the **eMPF Mobile App / Web Portal**.



You will be redirected to the
"iAM Smart" mobile app to

"eMPF" would like to Open the "iAM
Smart" Mobile App

CANCEL OK

Smart".

Confirm

1 Identity Authentication

2 Fill in the
Profile

3 Account
Activation

If using "e-Identity Verification"

Select "e-Identity Verification" and start scanning

e-Identity Verification

Smart Tips:

Please take note of the followings when scanning your ID card and performing facial recognition.



ID Card Scanning

You will need to scan the front and back sides of your ID card respectively.



Identity Verification

When performing facial recognition, place the device at your eye level and look into the front camera. Hold for 3 - 5 seconds to complete.

[Watch Tutorial video](#)

Start Scanning

1 Identity Authentication

2 Fill in the
Profile

3 Account
Activation

If using "e-Identity Verification"

Select **"e-Identity Verification"** and start scanning

Note!

Passports are not accepted as a method of electronic identity authentication. If the member only holds a passport and does not have a Hong Kong ID card, the member needs to handle their MPF via manual means or to obtain HKID card to perform registration.

< Identity Verification X

1

2

3

Select your Identification Type

Select the type of identity document you are holding



HKID



Smart ID Card / New Smart ID
Card (Issue from 2018)

1 Identity Authentication**2 Fill in the Profile****3 Account
Activation**

If using "e-Identity Verification"

Scan the HKID card according to the instructions in the mobile app to verify the authenticity of the HKID and read the information on the card.

1 of 2

Front Face



Place your HKID in the frame and adjust your camera until the frame turns green.

1 Identity Authentication

2 Fill in the
Profile3 Account
Activation

If using "e-Identity Verification"

Align your face to the camera frame on the screen, perform the specified action and take a selfie to conduct live face detection and facial recognition.

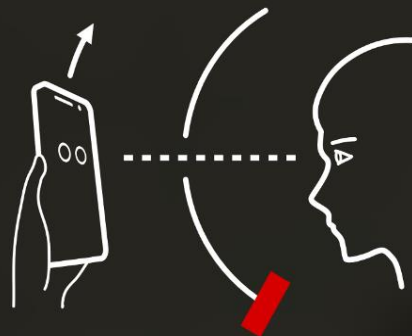
Tips for Facial Recognition:

- ✓ Moderate light
- ✓ Face the camera
- ✓ Do not cover the face

Note!

If you fail to pass the e-Identity Verification, please visit the eMPF Service Centre and present your identity document for identity authentication.

Lift your camera to eye level.



1 Identity Authentication

2 Fill in the profile

3 Account
Activation

Provide your personal information and set up
your communication method

Once you have successfully verified your identity with "e-Identity Verification" or "iAM Smart", some of your personal information will be **filled in automatically**.

Note!

Please remember to verify your email address and mobile phone number to ensure that you receive the required one-time passcode and eMPF-related communication information.



Register



Personal Information



Personal Details



Title

Given Name (English)

Surname (English)

Given Name (Chinese)

Surname (Chinese)

1 Identity Authentication

2 Fill in the profile

3 Account
Activation

Enter the Verification Code

Enter the Verification Code sent to your
email or SMS

The screenshot shows the 'Register' screen of the eMPF app. At the top, there is a progress bar with three steps: 1 (checked), 2 (current step), and 3. Below the progress bar, the title 'Personal Information' is displayed. Underneath, there is a section titled 'Personal Details' with a dropdown arrow. A modal dialog box is open in the foreground, titled 'Enter Verification Code'. The dialog contains the text: 'Enter the verification code we have sent by email to u*****@ifastepension.com.my.' Below this text is a row of six input boxes, with the first box containing the digit '1'. At the bottom of the dialog, there is a link that says 'Did not get a code? Resend in 60 seconds'.

1 Identity Authentication

2 Fill in the
profile

3 Account
Activation

Registration Completed

After completing the registration, you will be redirected to the account activation page and receive your eMPF number.



Activate your eMPF

⑧ eMPF ID:20000247609

Your eMPF ID is a unique ID for you to access the eMPF Platform for a lifetime. From now on, you can manage all of your MPF accounts on the eMPF Platform.

You have registered your eMPF successfully, please activate now.

Activate Now

1 Identity Authentication

2 Fill in the
profile3 Account
Activation

Account Setting

After completing the registration, create your username and password to activate your account.

Tips:

- Username: Maximum 50 characters, English letters, numbers, bottom lines and dots can be used.
- Password: Minimum **10** characters, with at least 1 block letter, 1 lowercase letter, 1 number and 1 character symbol.

Create Username and Password

Username

sit_nad04

- ✓ Within 50 characters, English letters, numbers, _(underscore) and . (dot) can be used

Password

.....



- ✓ At least 10 characters
- ✓ At least 1 upper case alphabet
- ✓ At least 1 lower case alphabet
- ✓ At least 1 number
- ✓ At least 1 of the following special characters !
@#\$%^&*(){}[]

Confirm Password

.....



Confirm

1 Identity Authentication

2 Fill in the
profile

3 Account
Activation

Update Information

If the personal information (phone number and email address) provided in the registration form is different from the registration information in the Scheme, you can choose to update the information.

Tips:

The updated information will allow you to keep abreast of the latest information about MPF from your trustees.



Migrated New Data

You have multiple version of personal data that stored in the local database across different Trustees. Would you like to update your data? Please be aware of the selected information will be updated to selected accounts.

Registration Contact Information

Registered Mobile No.

97 [Redacted]

Registered Email

taimanchan@gmail.com

Apply to:

Mobile Phone Number

MPF Scheme A ☐

Account Type: Self Employed Person

(+852) 90123456

1 Identity Authentication

2 Fill in the
profile

3 Account
Activation

Once the account activated, you can use your username and password to log on to the eMPF Platform.



Account Activated

12/08/2021 | 19:30

Your account has been successfully created.
Please login and start for usage.

Login Now

Member Portal b. eMPF Login



Login Method

eMPF ID or Username

Biometric Authentication

iAM Smart

You can log on to the eMPF Mobile App using your eMPF number, your username, biometric authentication or iAM Smart

Login with Username or eMPF ID

After logging in for the first time, you can add your device as a trusted device

Tips:

- If you have added your mobile device as a trusted device, you can skip the two-factor authentication step when you log in.



Trust this Device?

Your account is secured by 2-step verification. You may skip 2-step verification in future logins if you trust this device.

Trust

[Do not Trust](#)

Login with biometric authentication

After logging in for the first time, you can set up biometric authentication to log in.

Tips:

- If you skip setting up biometric authentication, you can click "**My Account**" after logging in, select "**eMPF Account Setting**" and click "**Biometric Login**". Follow the instructions on the mobile app to complete the remaining steps.



Enable Biometric Login?

Biometric login lets you access eMPF in a faster and safer way.

☐ Do not ask me again

Set Up

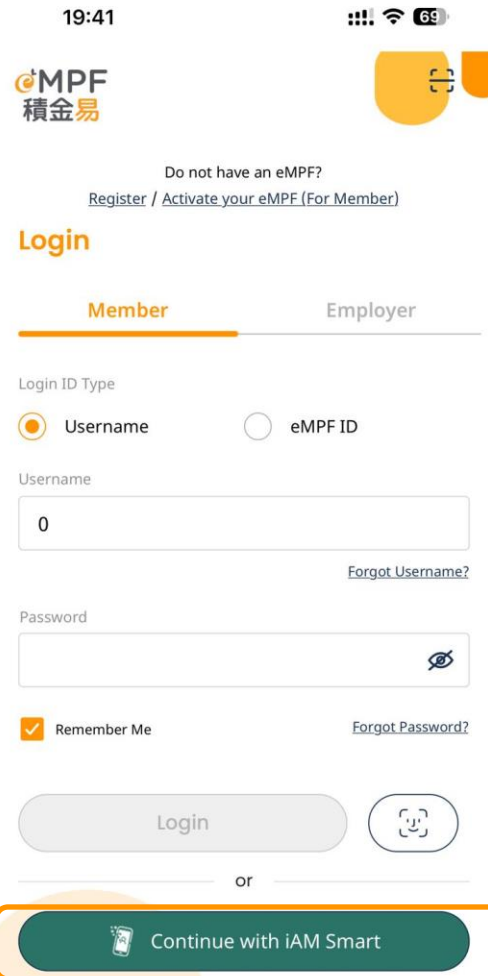
[Skip](#)

Login with iAM Smart



Select Login with "iAM Smart"

Note!

You are required to download the "iAM Smart" mobile app and register as an "iAM Smart" user before you can log on to the eMPF under "iAM Smart".



19:41

Do not have an eMPF?
[Register](#) / [Activate your eMPF \(For Member\)](#)

Login

Member Employer

Login ID Type

☒ Username ☐ eMPF ID


Username

0


[Forgot Username?](#)

Password

☒ Remember Me [Forgot Password?](#)

Login 

or

 Continue with iAM Smart

➤ Only apply to MPF Scheme onboarded to eMPF Platform

Current data of scheme members under onboarded MPF Scheme will be migrated to eMPF Platform from trustees, including **Personal Information, Business Information, Relevant Income, Investment Choice and Contribution Record**. Please review and confirm the accuracy of migrated data.

Note!

You account details will not be displayed in eMPF Platform if the joined scheme(s) are not onboarded to eMPF Platform yet.

Welcome, Chan Tai Man

eMPF ID: 20000020000

You have **6** Outstanding task(s)
for follow up:

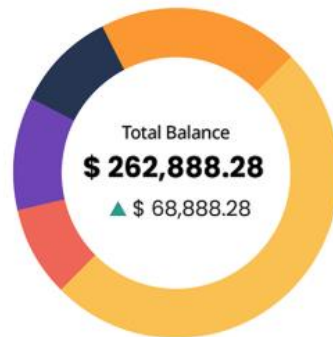
[See all](#)

You have an outstanding bill pending for payment
Please settle the contributions as soon as possible
to avoid any delay.



My Portfolio

All Regular Employee Personal Account



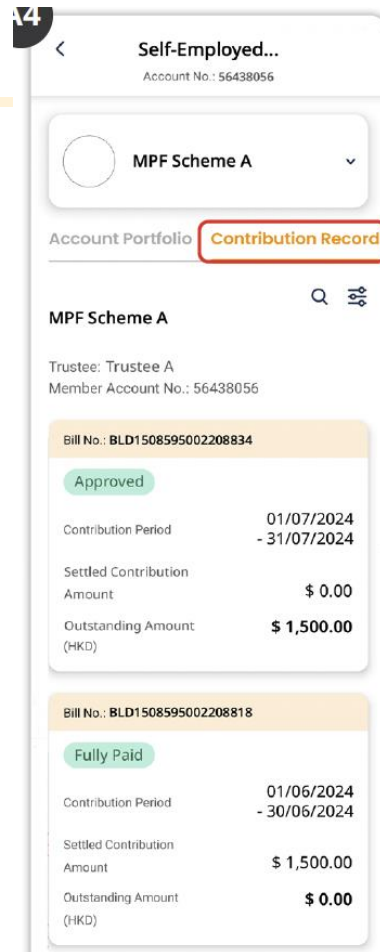
Investment gain (loss) ▲ \$ 68,888.28

Since inception of the account(s) (Inception date may vary from each

- Only apply to MPF Scheme onboarded to eMPF Platform

On the “Account Portfolio” page, select an account under “My Portfolio,” scroll down and choose an MPF scheme. Select “Contribution Record” to view a summary of your recent contributions. You may also click on individual records to review contribution details.

Remark: Your current employer's contribution records will appear in either the Regular Employee account or Casual Employee contribution account for industry scheme.



The screenshot shows the 'Self-Employed...' account page with Account No. 56438056. Under 'Account Portfolio', 'MPF Scheme A' is selected. The 'Contribution Record' tab is active, showing details for 'MPF Scheme A' (Trustee: Trustee A, Member Account No.: 56438056). Two contribution records are displayed:

Bill No.: BLD1508595002208834	
Approved	
Contribution Period	01/07/2024 - 31/07/2024
Settled Contribution Amount	\$ 0.00
Outstanding Amount (HKD)	\$ 1,500.00

Bill No.: BLD1508595002208818	
Fully Paid	
Contribution Period	01/06/2024 - 30/06/2024
Settled Contribution Amount	\$ 1,500.00
Outstanding Amount (HKD)	\$ 0.00

Member Portal

c. Change of Personal Details



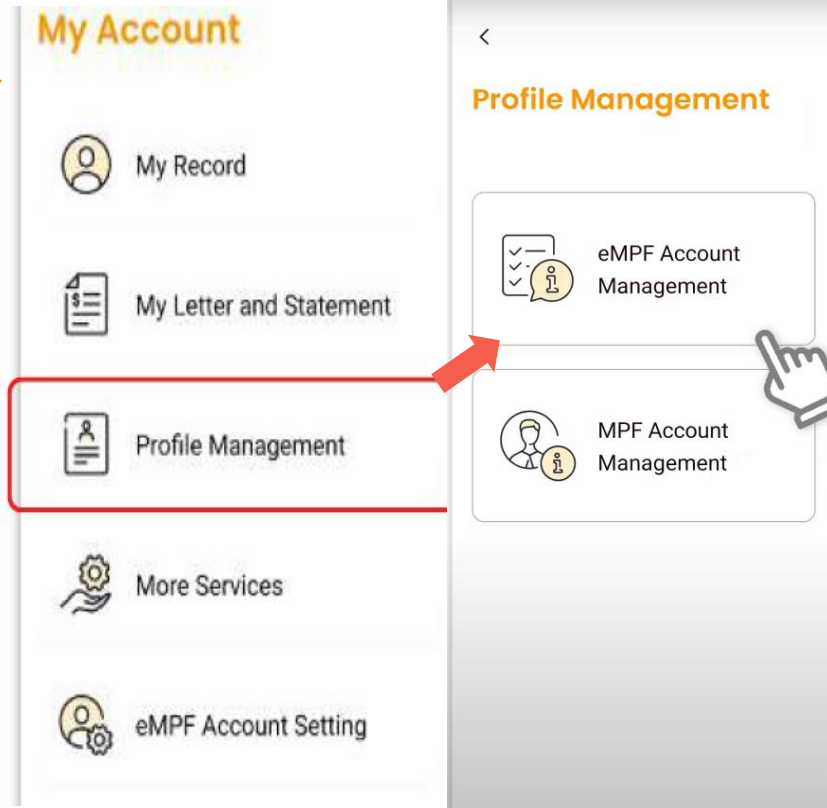
Change of Personal Details

Select eMPF
Account
Management

Edit your
profile

Apply to All
Accounts

Update your personal information under **"My Account" > "Profile Management" > "eMPF Account Management"**.



Change of Personal Details

Select eMPF Account
Management

Edit your profile

Apply to All
Accounts

On the "**eMPF Account Management**" page, click "**Update**" to change your account information.

陳大文

ID Type
HKID


ID No.
L8670199


Date of Birth (DD/MM/YYYY)
11 / 11 / 1980


Gender
Male


Place of Birth
Hong Kong, China


Nationality
Chinese




Contact Information


Address


Way of Communication


Common Reporting Standard

Update

Change of Personal Details

Select eMPF Account
Management

Edit your profile

Apply to All
Accounts

Enter the personal information you wish to update — such as your address, mobile phone number, communication language, Common Reporting Standard (CRS) details, etc.

Click "**Save**" once you've completed the updates

Tips:

If you wish to update your mobile number or email address, click "**Verify**" to receive a one-time passcode. Enter the passcode sent to your new mobile number or email address to complete verification.

Nationality
Chinese

✓ Contact Information

Email Address
chantaiman@abc.com **Verify**

Mobile No.
+852 91234567 **Verify**

Secondary Telephone No. (Optional)

✓ Address

✓ Way of Communication

✓ Common Reporting Standard

Save
Cancel

Change of Personal Details

Select eMPF Account
Management

Edit your profile

Apply to All
Accounts

Once the information is saved, a one-time password (OTP) will be sent to you via email or SMS.

< Profile Management

eMPF Registration Information

eMPF ID: 123456789

✕

Email Verification Code

Enter the verification code we've sent by
Email to c*****@gmail.com.

3

1

0

1

5

2

Didn't get a code?
Send again in 58 seconds

First Name (Chinese)

大文

Save

Cancel

Change of Personal Details

Select eMPF Account
Management

Edit your profile

Apply to All
Accounts

You can change the information of your MPF account at the same time. Select the account you want to change your information and click "Apply".

Apply to All Account?

The contact information are different from your profile. Do you want to apply new contact information below to all scheme? Please be aware of the selected information will be updated to selected accounts.

Registration Contact Information

Registered Mobile No.
97561177

Apply to:

Mobile Phone Number

MPF Scheme A ☒

Account Type: Self Employed Person

(+852) 90123456

MPF Scheme B ☐

Account Type: Employee Account

(+852) 92341567

Apply

[Skip](#)

Change of Personal Details

Select eMPF Account
Management

Edit your profile

Apply to All
Accounts

Finally, verify the information and click "**Confirm**" on the confirmation page.

9:41

< Profile Management

Confirmation

Information Change Details

Contact Details

Email Address
+852 9012 0045

Current Correspondence Address
Room 777, Block 7, ABC Building, ABC street, ABC Area, Hong Kong

Applied Changes

Mobile Phone No.

Account 1

MPF Scheme A
Account Type: Contribution

Account 2

MPF Scheme B
Account Type: Self Employed Person

Residential Address

Account 1

MPF Scheme A
Account Type: Self Employed Person

Submit

Member Portal d. Consolidating Accounts / Transferring MPF Arrangement



Consolidating Accounts / Transferring MPF Arrangement

Types Of Transfer

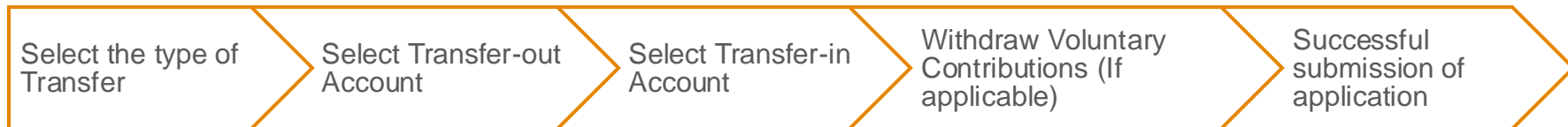
Employee Choice
Arrangement
(ECA)

Personal Account
Consolidation

Transfer Of Tax
Deductible Voluntary
Contributions (TVC)

Transfer After
Termination of
Employment

Steps Of Transfer



Attention!

- If the scheme to which the scheme member wishes to transfer is not yet enrolled, the member needs to open an MPF account in the new scheme before the transfer of MPF benefits can take place.

Consolidating Accounts / Transferring MPF Arrangement

You can only submit your transfer instructions on the eMPF after the transfer out scheme and transfer in scheme have been onboarded the eMPF Platform. If the relevant schemes has yet to be onboarded the eMPF Platform, you will be reminded to submit the hardcopy of your application. You may check the scheme onboarding schedule on the eMPF website.

Original Scheme with Transfer-Out Account	New Scheme with Transfer-in Account	Method of Submitting Administrative Instructions
✓ Onboarded	✗ Not Yet onboarded	Submit the hardcopy application form to transfer-in trustee
✗ Not Yet onboarded	✓ Onboarded	Submit the hardcopy application form to the eMPF
✓ Onboarded	✓ Onboarded	Submit Online application via eMPF

Scheme Member Transferring MPF

Select the type of Transfer

Select Transfer-out Account

Select Transfer-In Account

Review and Submit

Tap **"My MPF"** on the menu bar and tap **"Transfer MPF"**.
Then select **"Personal Account Consolidation"**.

Employee Choice Arrangement (ECA)

Transfer Of Tax Deductible Voluntary Contributions (TVC)

Transfer After Termination of Employment

Personal Account Consolidation

The following is an example of "Personal Account Consolidation".

Attention!

- If the administration of the member's MPF trustee has been transferred to the eMPF, please note that the new member account number must be filled in if the member needs to choose to fill in the form when handling the merger of his/her MPF personal account in the future.



Transfer MPF

Please select the type of transfer you would like to perform.



Personal Account Consolidation

- Consolidate multiple personal accounts into one account under your choice of MPF trustee and scheme to manage MPF at ease
- Applicable to scheme



Scheme Member Transferring MPF

Select the type of Transfer

Select Transfer-out Account

Select Transfer-In Account

Review and Submit

Select the **Transfer-out Account(s)** and tap “Next”.

Tips:

- The system will list all the accounts that are eligible for transfer.
- **Members can select multiple accounts at once.**



Personal Account...



1

2

3

Select Transfer-out Account

You are applying
personal account consolidation

Please select the account(s) from the check box options below to which your MPF benefits are to be transferred.

* The "Account Balance (HKD)" is as of the latest fund price date. Please note that it is the latest account balance for reference only and it is not indicated as transferable balance.



MPF Scheme A

Next

Scheme Member Transferring MPF

Select the type of Transfer

Select Transfer-out Account

Select Transfer-In Account

Review and Submit

Attention!

- The account that the scheme member is looking for may not have been transitioned to the MPF e-Procurement platform yet. The member can click “Not Able to Find the Account You Need?” and the member will be redirected to the form download page.
- If the Transfer-in scheme has yet to be onboarded the eMPF Platform, please submit the hardcopy of your application to trustee.**
- If the Transfer-in scheme has onboarded the eMPF but Transfer-out scheme was yet to be onboarded, please submit the hardcopy of your application to eMPF.

MPF Scheme A

Since | Member Account No. 56454385

Account Type Personal Account

Account Balance (HKD) \$ 5,436.70

[Account Details](#)

MPF Scheme B

Since | Member Account No. 56434439

Account Type Personal Account

Account Balance (HKD) \$ 8,180.14

[Account Details](#)



Not Able to Find the Account You Need?

Scheme Member Transferring MPF

Select the type of Transfer

Select Transfer-out Account

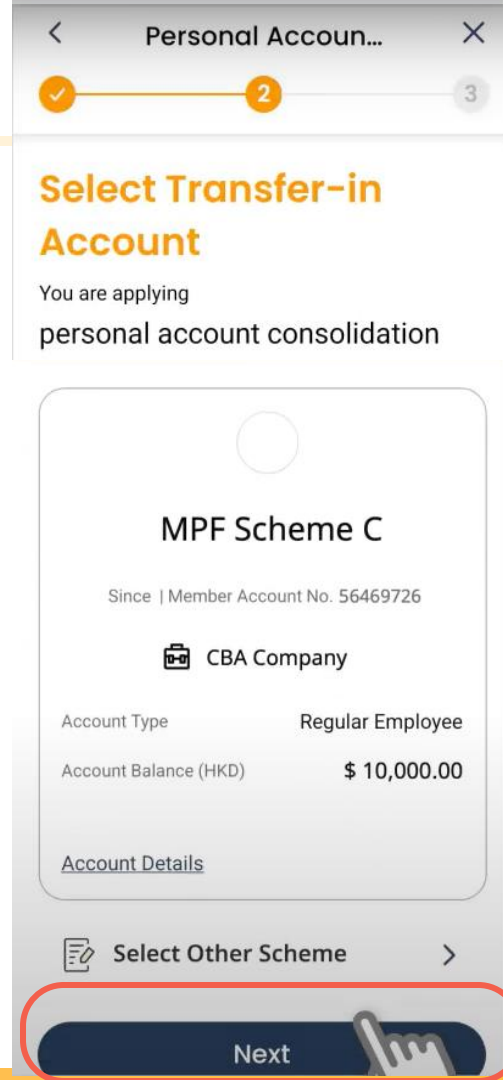
Select Transfer-In Account

Review and Submit

Select the **Transfer-in Account(s)** and tap “Next”.

Attention!

- Members are required to open an MPF account in the new scheme before the transfer can commence. If you have not yet enrolled in a scheme, click “Select Other Scheme”, select the trustee and scheme, and then follow the instructions to complete the enrollment.



Scheme Member Transferring MPF

Select the type of
Transfer

Select Transfer-
out Account

Select Transfer-
In Account

**Review and
Submit**

Review the information and tap “**Submit**”



MPF Scheme A

Trustee A

Account Type: Personal Account



Edit

Step 2 - Select Transfer-in Account



Selected Account Details



MPF Scheme C

Trustee C

Account Type: Regular Employee



Edit

Do you want to submit intermediary information?



Yes



No

Submit



Scheme Member Transferring MPF

Select the type of Transfer

Select Transfer-out Account

Select Transfer-In Account

Review and Submit

Read the Terms and Conditions and tap “**Accept**”

Then, your transfer request has been successfully submitted.



Terms and Conditions

By clicking the "Accept" button, you confirm that you have read and agree to be bound by the Terms & Conditions below.

I hereby give the eMPF Platform / the Trustee of the Original Scheme an instruction to terminate my TFC account in the Original Scheme upon transfer of all benefits to the New Scheme and there is no residual balance in the said account.

To the best of my knowledge and belief, the information given in this application is correct and complete.

6. List Of "Personal Information Collection Statement" ("PICS") Of The eMPF Platform and The Disbursed MPF Scheme

Personal Information Collection Statement of The eMPF Platform - emf.org.hk/pics/en

Personal Information Collection Statement of The Disbursed MPF Scheme - emf.org.hk/pics_en/trustee/en

Accept

Decline



Member Portal e. Change of Investment Instructions



Change of Investment Instructions

Members can change their investment instructions on the eMPF Platform, including **"Fund Switching/ Fund Rebalancing"** and **"Change Future Investment Mandate"**.



Change the investment portfolio of existing account balances

Select the scheme
and account

Fund Switching /
Fund Rebalancing

Select Transfer
In-Fund



Change Future Investment Mandate

Select the scheme and account

Change Future Investment
Mandate

Fund Switching / Fund Rebalancing

Select the scheme
and account

Fund Switching / Fund
Rebalancing

Select Transfer In-
Fund

Investment

Please select the investment instruction option according to your needs.

Select Investment. Then go to the "**Fund Switching/Fund Rebalancing**" page.



Fund Switching / Fund Rebalancing

Change the investment portfolio of your existing account balance, you may choose fund-to-fund switching or one-time rebalancing



Change Future Investment Mandate

Set a new fund allocation instruction that affects only new contributions, while keeping the existing MPF investment allocation intact

Fund Switching / Fund Rebalancing

Select the scheme and account

Fund Switching / Fund Rebalancing


Select Transfer In-Fund

Select the account and tap “**Next**”.

Fund Switching / Fun...
123

Select Scheme & Account

Please select the MPF account you would like to perform fund switching/rebalancing.




Fidelity Retirement Master Trust

Since 01 Jul 2023 | Member Account No. [REDACTED]

Account Type **Personal Account**

Account Balance (HKD) **\$ 15,879.40**

[Account Details](#)



MPF Scheme B

Since 01 Jul 2023 | Member Account No. [REDACTED]

Account Type **Personal Account**

Account Balance (HKD) **\$ 15,879.40**

[Account Details](#)

Next

Fund Switching/ Fund Rebalancing

Select the scheme and
account

Fund Switching/ Fund
Rebalancing

Select Transfer In-
Fund

Select Fund Switching

Please select the fund and enter the transfer-out and transfer-in percentage of the existing fund under the applicable contribution types. When you're done, press **“Next”**, verify the information and press **“Submit”**.

Tips:

1. If you want to transfer out more than one fund, please click **"Add Instruction"** and then enter the details of the next fund instruction.

Fund Switching Instruction

As of 28 / 11 / 2023

Switch Out

Switch In

Employer's Mandatory
Contributions

Employer's Voluntary
Contributions

☐ Rebalancing

Fund A



100 %

Fund Balance: \$ 5,800.30
(30.00% of your total fund balance)

Fund B



0 %

Fund Balance: \$ 3,778.14
(30.00% of your total fund balance)

Next

1

Add New Instruction

Fund Switching/ Fund Rebalancing

Select the scheme and account

Fund Switching/ Fund Rebalancing

Select Transfer In-Fund

Select Fund Rebalancing

You can choose a new investment allocation percentage for your entire existing accrued benefits in your MPF account.

Choose “**Switch Out**” tab, please switch on the “Rebalancing” toggle.

Tips:

Fund rebalancing – Changing the existing MPF portfolio in accordance with the new fund allocation instructions. The first step is to redeem the existing MPF according to the instructions and then reinvest it to achieve the required fund allocation ratio

Fund Switching / Fun...

1 2 3

Fund Switching Instruction

As of 28 / 11 / 2023

Switch Out Switch In

Employer's Mandatory Contributions Employer's Voluntary Contributions

☒ Rebalancing

Fund A ☒ 100 %

Fund Balance: \$ 5,800.30
(30.00% of your total fund balance)

Fund B ☒ 100 %

Fund Balance: \$ 3,778.14
(30.00% of your total fund balance)

Next

[Add New Instruction](#)

Fund Switching/ Fund Rebalancing

Select the scheme and account

Fund Switching/ Fund Rebalancing

Select Transfer In-Fund

Then, choose “**Switch In**” tab, enter the new investment allocation percentage under the applicable contribution type.

When you're done, press “**Next**”, verify the information and press “**Submit**”.

< Fund Switching/ Fund...

✓ 2 3

Make Instruction ⌵

Balance as of date 23 June 2021

Switch Out **Switch In**

ER Mandatory Contribution EE Mandatory

💡 Must be 100% and apply to all contribution sub-accounts

Fund A ⓘ	<input type="checkbox"/>
Fund B ⓘ	0%
Fund C ⓘ	0%
Fund D ⓘ	100%

Fund Switching / Fund Rebalancing

Change of Investment Instruction

Instruction Submitted
Successfully

After successfully changing your investment instruction, you will see the transaction record on the page.

Note!

- The **cut-off time** for submitting investment instructions to the eMPF Platform is **4:00 PM on each working day**.
- Instructions received **at or after the cut-off time** on a working day, or at any time on a non-working day, will be **treated as received on the next working day**.



**Fund Switching
Instruction Submitted
Successfully**

Reference No. SGD0408404000014247
Submission Date & Time: 05/12/2023, 17:34

[Go to My Record](#)

[Apply the Same Allocation
Percentage to Future Investment
Mandate](#)

Change of Future Investment Mandate

Select the scheme and account

Change Future Investment
Mandate

Investment

Please select the investment instruction option according to your needs.

Select **"Investment"**. Then go to the **"Change Future Investment Mandate"** page.



Fund Switching / Fund Rebalancing

Change the investment portfolio of your existing account balance, you may choose fund-to-fund switching or one-time rebalancing



Change Future Investment Mandate

Set a new fund allocation instruction that affects only new contributions, while keeping the existing MPF investment allocation intact

Change of Future Investment Mandate

Select the scheme and account


Change Future Investment
Mandate

Select the account and press “Next”.

< Fund Switching / Fun... 1 2 3

Select Scheme & Account

Please select the MPF account you would like to perform fund switching/rebalancing.




Fidelity Retirement Master Trust

Since 01 Jul 2023 | Member Account No. [REDACTED]

Account Type **Personal Account**

Account Balance (HKD) \$ 15,879.40

[Account Details](#)



MPF Scheme B

Since 01 Jul 2023 | Member Account No. [REDACTED]

Account Type **Personal Account**

Account Balance (HKD) \$ 15,879.40

[Account Details](#)

Next

Change of Future Investment Mandate

Select the scheme and account **Change Future Investment Mandate**

Members can choose constituent funds and change the allocation of future contributions.

Tips:

1. Depending on the terms of individual MPF schemes, employees may choose the DIS in full or on a pro-rata basis.
2. Each fund is colour-coded to indicate its level of risk.

9:41 Signal Wi-Fi Battery

< Change Future Investment...

✓ 2 3

New Allocation ⌵

Balance as of date 23 June 2021

ER Mandatory Contribution EE Mandatory Contribution

💡 Must be 100% and apply to all contribution sub-accounts

Fund Z ⓘ	<input type="checkbox"/>
Default Investment Strategy (DIS) ⓘ	0%
Fund A ⓘ Class 1	<input checked="" type="checkbox"/> 0%
Fund B ⓘ Class 3	<input checked="" type="checkbox"/> 100%

Change of Future Investment Mandate

Select the scheme and account

Change Future Investment
Mandate

Confirm the future investment allocation of contributions is correct, and click "**Submit**".

< Fund Switching / Fun...

1 2 3

Confirmation

Step 1 - Select Scheme & Account

Account Details

Fidelity Retirement Master Trust

Account Type: PAH
Account Balance (HKD) \$ 15,995.48

Edit

Step 2 - Fund Switching Instruction

Fund Switching Instruction 1

Switch Out

Mandatory Contributions

Fund A 20%
Fund B 30%

Voluntary Contributions

Switch In

Mandatory Contributions

Default Investment Strategy 100%

Submit

Select the scheme and account

Change Future Investment
Mandate

After successfully changing your investment instruction, you will see the transaction record on the page.

Note!

- The **cut-off time** for submitting investment instructions to the eMPF Platform is **4:00 PM on each working day**.
- Instructions received **at or after the cut-off time** on a working day, or at any time on a non-working day, will be **treated as received on the next working day**.

**Instruction Submitted
Successfully**

Reference No.: AB1234567890 | 12/06/2021, 19:30

We have received your instruction, your instruction will be processed on the next business day and within two business days

[See Transaction Record](#)[Back to Home](#)

Member Portal

f. Notification and Action items



Notification and Action items

How to check my
notifications and action items?

Notification

Action
items

Welcome, Chan Tai Man

eMPF ID: 20000020000

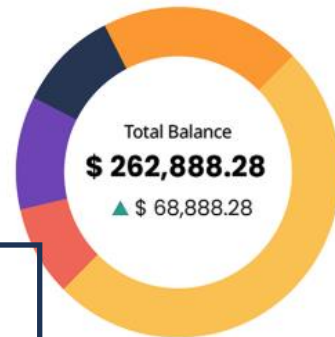
You have **6** Outstanding task(s)
for follow up:

[See all](#)

You have an outstanding bill pending for payment.
Please settle the contributions as soon as possible
to avoid any delay.

My Portfolio

All Regular Employee Personal Account



Investment gain (loss) ▲ \$ 68,888.28

Since inception of the account(s) (Inception date may vary from each

View Notifications

Use the filtering feature

On the Notifications page, view all updates and pending action items

Apart from email and SMS, communications from the eMPF Platform will also appear in your notifications bar

19/01/2024

● 更改密碼

帳戶管理

19/01/2024

09/01/2024

● 更改密碼

帳戶管理

09/01/2024

03/01/2024

● 更改密碼

帳戶管理

03/01/2024

Notification

View Notifications

Use the filtering feature

You can filter by “**Function**”, “**Status**” and “**Date**” to find the information you need.

×

篩選

重設

功能	^
狀態	^
接收通知時期	^

選擇時期

06/09/2023 - 07/03/2024

📅

顯示結果

View Action Items

Use the filtering feature

On the Action Items page, view various pending tasks

你有一個已儲存的待提交申請

功能

登記

僱主名稱

全新世界

計劃名稱

強積金計劃A

帳戶類別

一般僱員

參考編號

END2408412000040484_001

成員帳戶號碼

56476200

緊記填妥並提交你的申請。請注意，根據我們的資料保留政策，你儲存的資料將於以下到期日後自動刪除。

到期日： 12/03/2024

Action items

View Action Items

Use the filtering feature

You can filter by “**Scheme**”, “**Function**”, or “**Date**” to locate the information you need.

< 篩選

計劃 ▾

功能 ▾

到期日 ▲

06 / 03 / 2024 - 07 / 03 / 2024 

顯示篩選結果

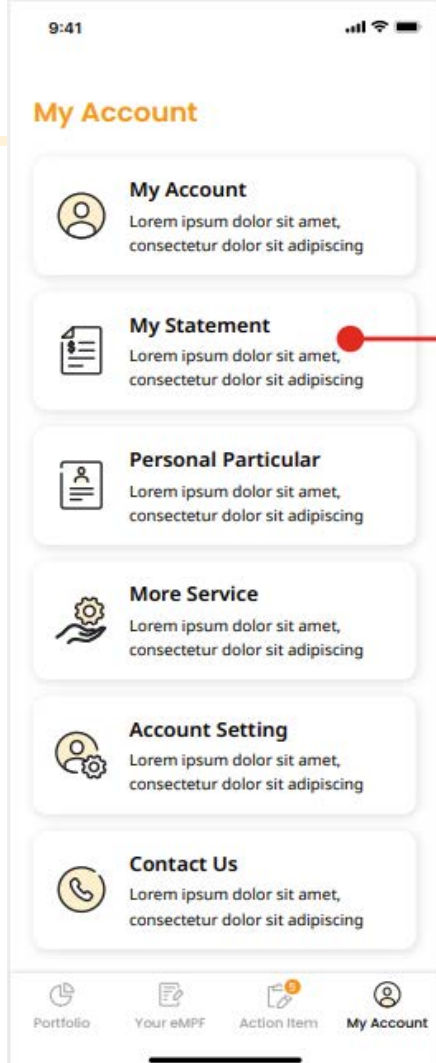
Pending action items	Description
Saved Records	Unfinished applications with saved drafts
Third-party Requests	Applications submitted by MPF intermediaries via the eMPF Assistant Portal
Employer Request – Enrolment	Employers enrolling employees into MPF schemes via the eMPF platform
Employer Request – LSP/SP Offsetting	Employer-initiated requests to offset LSP/SP
Termination Reporting	Follow-up actions after reporting termination for other contribution accounts
Unclaimed Benefits	Unclaimed benefits related to scheme members
Pending Application	Document verification failed (virus detected/invalid file); requires re-upload
Contribution Reminder	Unsettled contribution bill reminders

Member Portal g. MPF Statements



How can I access My MPF Statements?

Tap “**My Account**” on the menu bar and tap “**My Statement**”.



How can I access My MPF Statements?

The list of available statement(s) will be displayed. You can select the statement(s) and tap “**Download**” to have e-copy of your statement(s).



How can I access My MPF Statements?

You may also apply the filter function to search for designated statement(s) by using criteria of “Scheme Name”, “Type” and “Issue Period”.

9:41

Filter

Reset

Scheme Name

All Account(s)

MPF Scheme A

Account No.: 1212323132

Account Status: Terminating

MPF Scheme B

Account No.: 1212323132

Account Status: Terminating

Statement Type

All

Member Benefit Statement

Contribution

Enrolment

Fund Switching

Select Period

01/01/2020 - 30/04/2021

Show Statement Results

5. Supporting channels to Members

Self-help Information



Web Portal/Mobile
App
User Guide



Web Portal/Mobile App
Tutorial Video



FAQs

Customer Support



Online
Support



eMPF Customer
Service Hotline



eMPF Service
Centre

Channel	Detail	Manned service hours
eMPF Customer Service Hotline	183 2622	Monday to Friday: 9am to 7pm Saturday: 9am to 1pm (except public holidays)
Email	enquiry@support.empf.org.hk	
eMPF Service Centres	<p><u>Hong Kong Island</u> Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wan Chai, Hong Kong</p> <p><u>Kowloon</u> Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon</p> <p><u>New Territories</u> Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories</p>	Monday to Friday: 9am to 6pm Saturday: 9am to 1pm (except public holidays)

6. Q & A Session

富達退休集成信託

積金易平台
計劃成員講座
註冊積金易及轉移至積金易的支援



本次研討會注意事項

1. 本次簡介只展示積金易的部分功能。
2. 本次簡介所展示的平台功能和截圖非最終版本，積金易平台可能會不時微調以優化其功能，實際操作介面或有機會作出調整。

1. 積金易平台簡介
 2. 轉移至積金易平台的注意事項
 3. 積金易成員平台 - 功能概覽
 4. 積金易成員平台 - 功能教學
 5. 為計劃成員提供的全方位支援服務
 6. 問答環節
-

1. 積金易平台簡介



積金易公司是積金局的**全資附屬公司**，以非牟利的方式營運積金易平台這項**公用設施**



一站式處理強積金計劃行政工作的**電子**平台



讓僱主及計劃成員可以**輕鬆方便**管理強積金

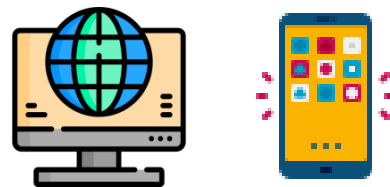
現況	轉移至積金易後
<ul style="list-style-type: none">向不同計劃受託人提交指示	<ul style="list-style-type: none">即使是不同的計劃，計劃成員亦可統一透過積金易平台提交指示
<ul style="list-style-type: none">根據所登記的強積金計劃，擁有數個受託人行政系統的帳戶	<ul style="list-style-type: none">只需註冊積金易一次，即可檢閱及管理各強積金戶口
<ul style="list-style-type: none">帳戶結餘零散，難以作退休規劃	<ul style="list-style-type: none">於一個平台掌握總退休儲備，提升退休規劃意欲及效率

平台全面運作



計劃成員

註冊及
啟動



積金易

網上平台及流動應用程式

登入積金易

查閱帳戶

提交指示

- ✓ 一站式檢閱和管理不同強積金計劃下的所有強積金帳戶
- ✓ 可隨時隨地透過網上更改投資指示或個人資料等
- ✓ 減少文書工作和人為錯誤
- ✓ 降低強積金計劃行政費用

2. 轉移時期的注意事項

計劃成員留意以下事項並採取相應行動

你的計劃轉移至積金易前,

請必須確保你的**姓名、出生日期及身份證號碼**與身份證及強積金受託人的紀錄一致。如資料不一致, 平台可能會為每個帳戶建立**多個 eMPF 登入 ID**, 從而增加帳戶管理的難度。

如發現資料不符, 請填寫成員資料更新表格並於**2025 年 12 月 12 日下午6時或之前**連同相關證明文件送達予富達退休集成信託的行政管理人滙豐機構信託服務(亞洲)有限公司(「HTHK」)以作更新。





1

留意計劃轉移至平台的**實際日期 (2025年12月30日)**

2

註冊積金易

建議計劃成員在收到資訊包後通過積金易平台註冊，但有關的強積金帳戶資料只會在計劃轉移至積金易後才顯示。

3

留意計劃轉移至積金易期間的運作安排

每個計劃需要數個工作天轉移至積金易，期間受託人處理相關的強積金帳戶的行政指示會提早截止。

在加入平台當日或之後，相關強積金計劃的行政指示，請通過積金易（網上平台／流動應用程式）提交指示。

受託人停止行政服務及積金易平台推出前的過渡安排



收到「積金易通訊包」後

留意計劃轉移至積金易期間的運作安排

- 每個計劃需要數個工作天轉移至積金易，期間受託人處理相關的強積金帳戶的行政指示會提早截止。
- 在過渡平台日期當日或之後，相關強積金計劃的行政指示，請通過積金易（網上平台／流動應用程式）提交指示。

指示	除非另有註明，否則由HTHK 於當日下午6時或之前收到:
成員（包括僱員成員、自僱人士、個人帳戶成員、TVC成員及 SVC成員）	
轉換（接獲紙本表格/電話指示的截止日期）	2025 年 12 月 17 日下午4時
更改投資委託（接獲紙本表格/電話指示的截止日期）	2025 年 12 月 17 日下午4時
供款（定期供款（接獲紙本表格的截止日期））	2025 年 12 月 10 日
供款（自僱人士相關入息申報（接獲紙本表格的截止日期））	2025 年 12 月 12 日
轉入（受託人必須在（透過實體渠道接收有效基金轉移表格的截止日期）之前收到有效的轉出指示，以處理轉移要求）	2025 年 12 月 9 日
轉出（受託人必須在截止日期之前透過轉入受託人收到有效的轉出指示）	2025 年 12 月 9 日
提取累算權益（永久離港（接獲紙本表格的截止日期））	2025 年 12 月 4 日
提取累算權益（其他情況（接獲紙本表格的截止日期））	2025 年 12 月 9 日
成員登記（接獲紙本表格的截止日期）	2025 年 12 月 12 日
更改成員資料（接獲紙本表格的截止日期）	2025 年 12 月 12 日
DDA（設定新的DDA指示（接獲紙本表格的截止日期））	2025 年 12 月 12 日
DDA（更改銀行帳戶或資料（接獲紙本表格的截止日期））	2025 年 12 月 12 日

請注意：

除基金轉換及更改投資委託指示外，HTHK在上述各截止日期後及加入平台日前收到的任何指示，將於加入平台日轉移至積金易平台處理。HTHK在上述各截止日期後及加入平台日前收到的基金轉換及更改投資委託指示將不獲受理。成員須於加入平台日或之後重新於積金易平台提交基金轉換及更改投資委託指示。

受託人停止行政服務及積金易平台推出前的過渡安排（續）

	富達退休集成信託
數碼服務渠道	截止時間 — HTHK於該時間或之前收到：
流動應用程式	2025年12月9日下午6時（TVC 轉入）
	2025年12月10日下午6時（TVC 登記）
	2025年12月10日下午6時（TVC 供款）
	2025年12月17日下午6時（選擇接受／拒絕收取直接市場推廣和電子結單）
成員網頁	2025年12月4日下午6時（提取累算權益 — 設立新的常設指示）
	2025年12月9日下午6時（提取累算權益 — 正常／提早退休）
	2025年12月17日下午4時（轉換及更改投資委託）
	2025年12月17日下午6時（更改成員資料）
	2025年12月17日下午6時（選擇接受／拒絕收取直接市場推廣和電子結單）

請注意：

除基金轉換及更改投資委託指示外，HTHK在上述各截止日期後及加入平台日前收到的任何指示，將於加入平台日轉移至積金易平台處理。HTHK在上述各截止日期後及加入平台日前收到的基金轉換及更改投資委託指示將不獲受理。成員須於加入平台日或之後重新於積金易平台提交基金轉換及更改投資委託指示。

敬啟者：

透過「積金易」平台迎接全新數碼化強積金體驗

積金易平台有限公司（「積金易公司」）¹與 HSBC Provident Fund Trustee (Hong Kong) Limited (HPFT) 誠邀您一起透過「積金易」平台（「積金易」），迎接全新強積金數碼體驗！

「積金易」有何好處

「積金易」是一個一站式的中央電子平台，讓您隨時隨地透過手機應用程式或網上平台管理您的強積金。無論您是計劃成員、僱主或自僱人士，「積金易」會為您帶來全新體驗及多個好處，包括：

計劃成員及自僱人士

- 就已匯至「積金易」的強積金帳戶：
- 一站式查閱帳戶結餘及管理所有帳戶
- 隨時隨地整合帳戶和更改投資組合
- 輕鬆作自願性供款
- 一次過申請從不同強積金計劃提取強積金



僱主及自僱人士

- 提供不同電子方式作強積金供款
- 自動計算供款金額
- 接收供款到期的電子提示
- 減少文書工作及人為錯誤



何時開始使用

強積金受託人及其計劃已陸續依次逐一加入「積金易」（詳情見 www.empf.org.hk）。HPFT 的富達退休集成信託的帳戶資料，將由以下日期起轉移至「積金易」：

富達退休集成信託：

加入「積金易」預定日期 2025 年 12 月 30 日

由上述日期起，您在此強積金計劃下的帳戶資料及記錄將會轉移至「積金易」。HPFT 仍為上述計劃的受託人，而積金易公司將使用「積金易」執行強積金計劃下的行政工作，為您提供計劃行政服務及處理您的服務指示，包括供款、更改投資組合、查詢帳戶結餘及提取強積金等，屆時，您可透過「積金易」管理您的強積金，而無須再向 HPFT 提交服務指示。

「積金易」註冊開戶

由 2025 年 10 月 1 日起，您只須辦理一次性的「積金易」註冊開戶手續，即可享受「積金易」帶給您的好處。請參閱背頁的計劃成員註冊「積金易」使用指南及受託人的訊息，展開您的強積金數碼新旅程！如您亦持有另一已加入「積金易」的強積金帳戶，並已於早前完成註冊「積金易」開戶，您則無須再次註冊開戶。

查詢

如有查詢，請致電「積金易」客戶服務熱線 183 2622，我們期待在「積金易」為您提供服務。

積金易公司
及 HPFT 謹啟

¹ 積金易公司為強制性公積金計劃管理處全資附屬公司，以非牟利方式，營運屬公共服務的「積金易」。

² 加入「積金易」日期須以在商業特別行政區政府憲報刊登的法律公告為準。如日期有調整，受託人會適時通知您。

³ 使用「積金易」及計劃行政服務須先「積金易」的一般條款及服務約束，詳情請瀏覽 www.empf.org.hk/tmc。

	項目	方式
1	給計劃成員的通知函	紙本/電子方式
2	致參與僱主及計劃成員的通知	二維碼
3	註冊積金易的使用指南	
4	常見問題	
5	積金易平台的收集個人資料聲明	

受託人的訊息

由 2025 年 12 月 30 日起，積金易公司將負責執行強積金計劃下的行政工作及透過「積金易」為您提供計劃行政服務，包括處理計劃成員、僱主及自僱人士提交的服務指示。因此，您應直接向「積金易」提交所有有關計劃行政的服務指示，而並非向 HPFT 提交。

HPFT 會根據不同的截止日期停止接受服務指示。請參閱致參與僱主及計劃成員的通知了解詳情。



致參與僱主及計劃成員的通知

<https://www.fidelity.com.hk/static/hong-kong/pdf/empf/2025-fidelity-empf-notice-zh.pdf>

HPFT 在截止日期後收到的服務指示，將於 2025 年 12 月 30 日計劃加入後，由「積金易」處理。



- 受託人 HSBC Provident Fund Trustee (Hong Kong) Limited 會在 **2025 年 10 月起** 向計劃成員發放此資訊包。
- 計劃成員可以開始到積金易平台網站註冊積金易。
- 但計劃成員的強積金帳戶資料會在 **轉移日起 (即 12 月 30 日起)** 才顯示。

受託人的加入平台日及提交指示截止期限

受託人	強積金計劃	轉移至積金易日期	積金易平台處理的事宜和進行的活動	提交指示截止期限
HSBC Provident Fund Trustee (Hong Kong) Limited	富達退休集成信託	2025年12月30日	<p>計劃成員</p> <ul style="list-style-type: none"> 處理計劃成員的積金易平台註冊申請； 處理計劃成員的參加註冊計劃申請； 處理強積金供款及拖欠供款； 處理計劃成員的投資指示（包括新供款投資指示及轉換指示） 處理註冊計劃內、註冊計劃之間或從職業退休計劃轉移至註冊計劃的權益轉移申請； 處理申索及提取強積金權益的申請； 處理計劃成員的遣散費及長期服務金的抵銷及退還申請； 處理計劃成員的資料更改申請； 向計劃成員發出通知及文件； 處理查詢及投訴； 及就任何不明確的計劃管理指示向計劃成員進行跟進。 	*詳情可查閱滙豐自2025年10月起寄出的通訊包

- 由富達退休集成信託加入積金易平台當日起，有關**行政工作將由積金易執行**。
- 計劃成員可直接透過積金易平台管理信託內的強積金帳戶，並把其**行政指示提交予積金易處理**。
- 由加入平台日起，HTHK將不再為富達退休集成信託的行政管理人，計劃成員**不應繼續向HTHK提交強積金指示**。

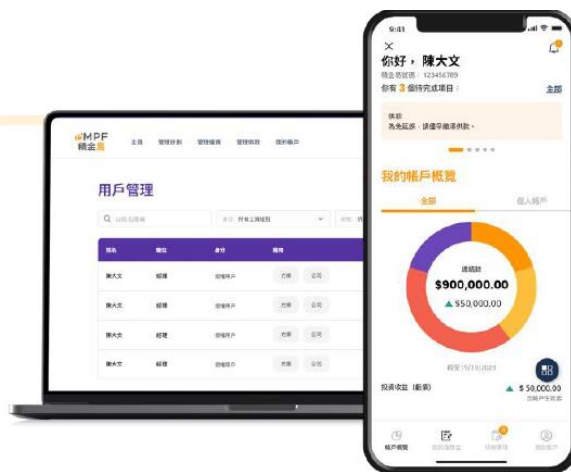
計劃成員留意以下事項並採取相應行動

	事項	詳情	相應行動
(1)	註冊使用積金易平台 (適用於所有計劃成員)	<ul style="list-style-type: none"> 註冊使用積金易平台，以便日後透過積金易平台管理你的強積金帳戶。 於富達退休集成信託加入積金易平台後，即可透過平台查閱相關帳戶資料。 計劃上線平台後，全新成員帳戶號碼將取代原受託人使用的成員號碼，計劃成員應使用全新號碼提交行政指示。 	<p>1. 掃描以下二維碼，以註冊使用積金易平台</p> <div>   </div> <div> <p>積金易 網上平台</p> <p>積金易 流動應用程式</p> </div> <p>2. 由 2025 年 12 月 30 日起，瀏覽積金易網上平台： https://www.empf.org.hk/</p>

計劃成員留意以下事項並採取相應行動

	事項	詳情	相應行動
(2)	提交行政指示及就強積金帳戶作出查詢	<ul style="list-style-type: none"> 由加入平台日(2025年12月30日)起，透過積金易網上平台或積金易流動應用程式提交強積金行政指示。 由加入平台日起，所有強積金行政表格均可於積金易網站 www.empf.org.hk 下載，以及於積金易服務中心索取 積金易平台將會處理相關強積金行政指示及如有跟進事宜都會由積金易平台發出。 積金易平台將會處理就強積金帳戶作出的查詢。 請注意，於截止日期後透過受託人提供的原有方式所接收的強積金行政指示，將會延遲或不獲處理。 	<p>於積金易網站查閱積金易使用指南/教學短片</p> <p>https://www.empf.org.hk/tutorial/member/</p>
(3)	提交供款資料及付款指示 (只適用於可扣稅自願性供款帳戶持有人、特別自願性供款帳戶成員及自僱人士成員)	<ul style="list-style-type: none"> 由加入平台日(2025年12月30日)起，經積金易網上平台或積金易流動應用程式提交供款資料及付款指示。 「積金易」服務中心不接受任何現金供款，可把供款支票放入「積金易」服務中心內的投遞箱或於「積金易」平台以電子付款方法支付供款。 	<p>於積金易網站查閱此計劃接受的付款方式</p> <p>https://www.empf.org.hk/page/paymentMethods</p>

網上提交指示 (*建議使用)



積金易
網上平台

積金易
流動應用程式

用行政表格提交指示



電郵地址
(forms@support.empf.org.hk) (3197 2988)



傳真



郵寄
(地址: 尖沙咀郵政局
郵政信箱 98929 號)



任何一間積金
易服務中心的
投遞箱

3. 積金易 – 成員平台 功能概覽



帳戶註冊及登記

- 註冊積金易
- 登記計劃



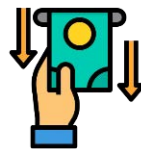
管理供款

- 計算及提交強制性供款
- 計算及提交自願性供款
- 多元化付款方法



管理 強積金帳戶

- 轉換基金
- 轉移強積金計劃
- 更改個人資料



提取強積金

- 提取強積金權益



通知、文件及報表

- 通知及文件
- 強積金權益報表

eMPF 積金易

涵蓋所有強積金計劃的行政程序



網上平台



流動應用程式

電子化所有行政程序

積金易平台涵蓋所有強積金計劃的行政程序，所有以往只有紙本表格的指示均可以網上提交



提供網上平台和流動應用程式

網上平台和流動應用程式均會提供同樣的功能，以便成員在不同情況使用



4. 積金易 – 成員平台 功能教學

- a 註冊積金易
- b 登入積金易
- c 更改個人資料
- d 轉移強積金權益或
整合強積金帳戶
- e 更改投資指令
- f 通知及待辦事項
- g 強積金報表

成員平台

a. 註冊積金易



三步登記積金易

1 身分驗證

2 填寫個人資料

3 啟動帳戶

註冊準備

如使用「智方便」作驗證



個人流動電話

(已安裝「積金易」及「智方便」流動應用程式)

如使用「電子身分驗證」作驗證



個人流動電話

(已安裝「積金易」流動應用程式)

身份證

首次註冊積金易

若計劃成員尚未註冊積金易，可下載**積金易流動應用程式**，選擇以**成員**身分完成註冊

成員包括：

- 一般僱員
- 臨時僱員
- 自僱人士
- 個人帳戶持有人

註冊積金易

只需幾步，即可完成你的積金易註冊。請選擇你的身分。



成員

適用於所有強積金計劃成員，如：

- 一般僱員
- 臨時僱員
- 自僱人士
- 個人帳戶持有人
- 可扣稅自願性供款持有人

僱主

適用於
的僱主

首次註冊積金易

若計劃成員尚未註冊積金易，可以下載積金易流動應用程式，選擇以成員身分完成註冊。



成員註冊

成員註冊

只需3步，即可註冊你的積金易


 請留意，積金易平台已實施資料私隱保障措施。在繼續註冊前，你應細閱積金易網頁上的私隱政策。



第1步 驗證你的身分

掃描香港身份證及以容貌辨識進行驗證，或登入「智方便」流動應用程式驗證。



第2步 填妥個人資料

提供你的個人資料及設定通訊方式。



第3步 啟動積金易

建立你的用戶名稱及密碼。


 教學 - 註冊積金易

所需項目

在開始前，請先準備以下項目，以便順利進行註冊：

- ✓ 你的香港身份證
- ✓ 手機及電郵地址（用以接收一次性密碼作驗證及透過流動應用程式啟動帳戶，如適用）
- ✓ 已安裝的「智方便」流動應用程式（如適用）

開始註冊

[查找現有紀錄以繼續](#)

1 身分驗證

2 填寫個人資料

3 啟動帳戶

選擇身分驗證方式：「電子身分驗證」或「智方便」

「智方便」小貼士：

- ✓ 若已為智方便登記用戶，推薦使用「智方便」作驗證，過程簡單快捷。
- ✓ 「智方便」亦可作為日後登入積金易平台的方法

「電子身分驗證」小貼士：

- ✓ 電子身分驗證是透過掃描香港身分證及以人臉識別進行身分驗證。

選擇身分驗證方式

基於保安理由，請先選擇其中一種方式以驗證你的身分。



「智方便」流動應用程式

登入「智方便」流動應用程式驗證
(建議使用「智方便」驗證，日後登入更便捷)



電子身分驗證

掃描香港身份證及以容貌辨識進行驗證，或登入「智方便」流動應用程式驗證。

1 身分驗證

2 填寫個人資料

3 啟動帳戶

如使用「智方便」作驗證

如選擇「智方便」，會被轉至「智方便」流動應用程式繼續完成身分驗證。

當你成功授權「智方便」與積金易平台連接後，請透過積金易流動應用程式／網上平台繼續進行註冊。



你將被帶到「智方便」流動應用程式繼續餘下步驟。

「積金易」想要開啟「智方便」流動應用程式

取消

確定

確定

1 身分驗證

2 填寫個人資料

3 啟動帳戶

如使用「電子身分驗證」作驗證

選擇以電子身份證驗證並開始掃描。

1

2

3

電子身分驗證

小貼士：

描身份證及進行容貌辨識時，請注意以下事項。



掃描身份證

你須掃描身份證的正面。



驗證身分

進行容貌辨識時，將你的裝置保持在視線水平並按畫面指示進行操作。

開始掃描

1 身分驗證

2 填寫個人資料

3 啟動帳戶

如使用「電子身分驗證」作驗證

選擇以電子身份證驗證並開始掃描。

注意！

護照並不接受作為電子身分認證的方式，若成員只持有護照並希望註冊積金易，成員應先獲取香港身份證後再作註冊。

選擇你所持有的身分證
明文件

選擇你所持有的身分證明文件



智能身份證 / 新智能身份證（由
2018年起簽發）



香港身份證

1 身分驗證

2 填寫個人資料

3 啟動帳戶

如使用「電子身分驗證」作驗證

根據流動應用程式內的指示掃描身份證，以驗證身份證真偽及讀取卡面資料。

1 of 2

Front Face



Place your HKID in the frame and adjust your camera until the frame turns green.

1 身分驗證

2 填寫個人資料

3 啟動帳戶

如使用「電子身分驗證」作驗證

將臉容對正屏幕上的照相框，作出指定動作及自拍，以進行真人及容貌辨識。

容貌辨識小貼士：



保持光線適中



臉部正對鏡頭

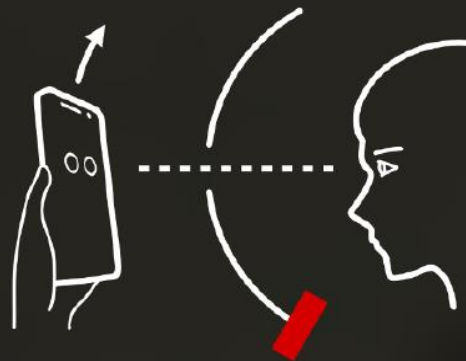


不要遮擋臉部

注意！

如你未能通過電子身分驗證，請攜同身分證明文件，親臨積金易服務中心尋求協助。

舉起手機到視線水平



1 身分驗證

2 填寫個人資料

3 啟動帳戶

提供你的個人資料及設定通訊方式

當你成功以電子身分驗證或「智方便」進行身分驗證後，部分個人資料將會被**自動填上**。

輸入餘下個人資料，包括聯絡資料、地址和通訊方式等。

注意！

請記得驗證你的電子郵件地址或手機號碼以確保之後收到登入所需的一次性密碼及積金易相關的通訊資料。

個人資料

✓ 個人資料

稱謂

先生

名字 (英文)

姓氏 (英文)

CHOW

名字 (中文)

姓氏 (中文)

周

1 身分驗證

2 填寫個人資料

3 啟動帳戶

輸入一次性驗證密碼

輸入發送到電子郵件或手機短訊的一次性驗證碼



1 身分驗證

2 填寫個人資料

3 啟動帳戶

完成註冊

完成註冊後，將會被導向啟動帳戶頁面，並收到個人的積金易號碼。



啟動帳戶

👤 積金易號碼：20000025955

你的積金易號碼是一組供你終身訪問積金易平台的獨特號碼。由現在起，你可在積金易平台上管理你名下的所有強積金帳戶。

你已成功註冊積金易帳戶，請立即啟動帳戶。

立即啟動

1 身分驗證

2 填寫個人資料

3 啟動帳戶

帳戶設定

設定你的用戶名稱及密碼。

小貼士：

- 用戶名稱：50個字元以內，可使用英文字母、數字、底線及點。
- 密碼：最少**10**個字元，最少包含1個大楷字母、1個小楷字母、1個數字及1個字元符號。

建立用戶名稱及密碼

請建立你的積金易帳戶用戶名稱及密碼。

用戶名稱

bieasyg_23



8 - 50個字元以內，最少包含1個字母。可使用英文字母、數字、_（底線）及.（點）。

密碼

.....



最少10個字元



最少包含1個大楷字母



最少包含1個小楷字母



最少包含1個數字



最少包含1個以下符號 !@#\$%^&*()_[]

確認密碼

.....



確定

1 身分驗證

2 填寫個人資料

3 啟動帳戶

更新資料

如果註冊填寫的個人資料(電話號碼及電郵地址)與計劃內登記資料不同時，你可以選擇更新資料。

小貼士：

- 更新資料能让你從受託人中，得知有關強積金的最新消息。

1 身分驗證

2 填寫個人資料

3 啟動帳戶

完成啟動帳戶後，即可使用你的用戶名稱及密碼，登入積金易平台。



成功建立用戶名稱及密碼

13/12/2023 | 11:07

已成功建立帳戶。請登入並開始使用積金易平台。

成員平台

b. 登入積金易



登入方式

積金易號碼或用戶名稱

生物認證

智方便

你可以透過積金易號碼、已設定的用戶名稱、生物認證或智方便登入積金易流動應用程式。

使用積金易號碼或用戶名稱登入

於首次登入後，你可以新增你的裝置為信任的裝置。

小貼士：

- 如你已增設你的流動裝置為信任的裝置，在登入時你可跳過雙重驗證步驟。



信任此裝置？

你的積金易受雙重驗證保障。如你信任此裝置，往後登入時將會跳過雙重驗證。

信任

不信任

使用生物認證登入

於首次登入後，你可以設定生物認證登入。

小貼士：

- 如你跳過設定生物認證，你可在登入後按「**我的帳戶**」，選擇「**積金易帳戶設定**」，點擊「**生物認證登入**」。根據流動應用程式上的指示完成餘下的步驟。



啟用生物認證登入

生物認證登入讓你可更快捷安全地使用積金易服務。

☐ 不要再問我

設定

跳過

登入

使用智方便登入

選擇以「智方便」登入。

注意！

你須先下載「智方便」流動應用程式並註冊成為「智方便」用戶後，才可以「智方便」登入積金易。

成員

僱主

登入帳戶類型



用戶名稱



積金易號碼

用戶名稱

[忘記用戶名稱？](#)

密碼



記住我

[忘記密碼？](#)

登入



或



以智方便繼續

登入成員平台後的基本設置

➤ 只適用於已加入轉移至積金易平台的計劃

受託人會把計劃成員在其強積金計劃的資料轉移至積金易平台，包括計劃成員及自僱人士的**個人資料、業務資料、有關入息、投資選擇、供款紀錄及詳情等**。請仔細檢閱及確認已轉移的資料是否正確。

注意!

如你已完成註冊但所參加的強積金計劃還**未轉移**至積金易平台，你的計劃資料**不會顯示**於積金易平台。



➤ 只適用於已加入 / 轉移至積金易平台的計劃

於「帳戶概覽」頁面，「我的投資組合」下選擇一種帳戶，向下滑並選擇一個強積金計劃。

選擇「供款紀錄」，你可查閱最近的供款概要。你亦可按入個別紀錄以查閱供款詳情。

備註：你現職的僱主供款紀錄，會顯示於一般僱員或行業計劃臨時僱員供款帳戶。



成員平台

c. 更改個人資料



選擇積金易帳戶管理


編輯個人資料

選擇套用於所有
帳戶的記錄

在「我的帳戶」>「帳戶管理」>「積金易帳戶管理」
下更新個人資料。


我的帳戶

 我的紀錄

 我的信件及報表

 帳戶管理


 更多服務


 積金易帳戶設定

 聯絡我們



帳戶管理

 積金易帳戶管理

 強積金帳戶管理

選擇積金易個人資料

編輯個人資料

選擇套用於所有帳戶的
記錄

在「積金易帳戶管理」頁面，按「更新」以更改帳戶資料。

帳戶管理

積金易帳戶管理

積金易號碼：20000092278
用戶名稱：DEMO_MBR_007

✓ 個人詳細資料 ^

稱謂
先生

姓氏 (英文) 名字 (英文)
Yeung [REDACTED]

姓氏 (中文) 名字 (中文)
楊 [REDACTED]

身分證類別
香港身份證號碼

身分證號碼
A34 [REDACTED]

註冊日期 性別
14/08/1992 女性

出生地點
中國

國籍
中國

✓ 聯絡詳情 ^

電郵地址
uat_otn@ifastension.com.my

更新

選擇積金易個人資料

編輯個人資料

選擇套用於所有帳戶的
記錄

輸入欲更改的個人資料，包括地址，電話，通訊語言，共同匯報標準(CRS)等。

完成更改後按「儲存」。

小貼士:

如欲更改手機號碼或電郵地址，請按「驗證」以接收一次性密碼。輸入已發送到你新手機號碼或電郵地址的一次性密碼。

< 帳戶管理

性別
女性

出生地點
香港特別行政區

國籍
中國

✓ 聯絡詳情

電郵
otp@ifastepension.com.my 驗證

手機號碼
+852 560 驗證

第二電話號碼 (可選填)

✓ 地址

☀ 不接納郵政信箱。

住址

國家/地區

儲存

取消

選擇積金易個人資料

編輯個人資料

選擇套用於所有帳戶的
記錄

資料儲存後，會使用電郵或短訊發送一次性密碼確認。



選擇積金易個人資料

編輯個人資料

可套用於所有強積金計劃的
記錄

你可同時更改強積金帳戶的資料。選擇需要更改資料的帳戶，然後按「**選擇**」。

帳戶管理

×

選擇計劃

一般僱員

強積金計劃A

(帳戶號碼: _____)

一般僱員

強積金計劃B

(帳戶號碼: _____)

一般僱員

強積金計劃C

(帳戶號碼: _____)

選擇

選擇積金易個人資料

編輯個人資料

可套用於所有強積金計劃的
記錄

最後核對資料，並於**確認頁面**按「提交」。

<

一般僱員帳戶

帳戶號碼: 56434439

確認

資料更新詳情

聯絡詳情

手機號碼

+852 912 [REDACTED] ✓

提交

[返回](#)

成員平台

d. 轉移強積金權益或 整合強積金帳戶



轉移強積金權益或整合強積金帳戶

轉移類別

僱員自選安排
(ECA)

整合個人帳戶

可扣稅自願性供款
轉移

離職後轉移

轉移步驟



注意！

- 如計劃成員欲轉入的計劃未登記，成員需要先開立新計劃的強積金帳戶才可轉移強積金權益。

無論是轉入或轉出的強積金計劃，你應待相關計劃都已經加入至平台後，才可透過積金易提交指示。如有關計劃尚未加入平台，積金易會提醒你以紙本表格提交申請。

轉出的強積金計劃	轉入的強積金計劃	提交行政指示方法
✓ 已加入	✗ 未加入	以紙本表格向 轉入的受託人 提交申請
✗ 未加入	✓ 已加入	以紙本表格向 積金易平台 提交申請
✓ 已加入	✓ 已加入	透過 積金易平台 於網上提交

選擇轉移類別

選擇轉出
權益的帳戶

選擇轉入權益的
帳戶

核對資料並提交

按「**我的強積金**」前往「**轉移強積金**」的頁面，選擇「**轉移類別**」

僱員自選安排
(ECA)

可扣稅自願性供款
轉移

離職後轉移

整合個人帳戶

以下將以「**整合個人帳戶**」作示範

注意！

- 若成員的所屬強積金公司行政已轉移到積金易平台後，成員日後在處理強積金個人戶口合併時，若有需要選擇填寫表格處理，敬請留意表格上填寫的成員帳戶號碼，必須填寫新的成員帳戶號碼。

轉移強積金

請選擇你想作出的轉移類別。



整合個人帳戶

- 將多個個人帳戶整合至你心儀的受託人及計劃，更輕鬆管理強積金
- 適用於持有多於一個個人帳戶的計劃成員

選擇轉移類別

選擇轉出
權益的帳戶

選擇轉入權益的
帳戶

核對資料並提交

選擇轉移類別後，成員可「**選擇轉出權益的帳戶**」，然後按「**下一步**」

小貼士：

- 系統會列出所有合乎條件可以轉出的帳戶。
- 成員亦可選擇**多於一個帳戶**作出轉移。



整合個人帳戶



1

2

3

選擇轉出權益的帳戶

你正在申請

整合個人帳戶

請選擇你想轉出強積金權益的帳戶。你可選擇多個帳戶以便作出轉移。

強積金計劃 A

自 | 成員帳戶號碼

帳戶類別

個人帳戶

帳戶結餘 (港幣)

\$ 35,300.70

帳戶詳情



找不到所需帳戶?



下一步

選擇轉移類別

選擇轉出
權益的帳戶

選擇轉入權益的
帳戶

核對資料並提交

注意！

- 計劃成員正在尋找的帳戶可能尚未過渡至積金易平台，成員可按「找不到所需帳戶？」，成員將被轉至表格下載網頁。
- 如轉入的強積金計劃仍未過渡至積金易平台，請將個人帳戶整合表格提交予受託人。**
- 如轉入的計劃已過渡至積金易平台而轉出的強積金計劃尚未過渡至積金易平台，請將個人帳戶整合表格提交予積金易平台。

<

整合個人帳戶

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1

2

3

選擇轉出權益的帳戶

你正在申請

整合個人帳戶

請選擇你想轉出強積金權益的帳戶。你可選擇多個帳戶以便作出轉移。



強積金計劃 A

自 | 成員帳戶號碼

帳戶類別

個人帳戶

帳戶結餘 (港幣)

\$ 35,300.70

帳戶詳情



找不到所需帳戶？



下一步

選擇轉移類別

選擇轉出
權益的帳戶

選擇轉入權益的
帳戶

核對資料並提交

選擇轉出帳戶後，
然後按「**下一步**」，
「**選擇轉入權益的帳戶**」，

注意！

- 成員須先開立新計劃的強積金帳戶才能開始轉移。如尚未登記計劃，按下「選擇其他計劃」，選擇受託人及計劃，然後按指示完成登記。

<

整合個人帳戶

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✓

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3

選擇轉入權益的帳戶

你正在申請

整合個人帳戶

請選擇你想轉入強積金權益的帳戶。你只可選擇一個帳戶。



當你的權益成功轉移後，有關權益將會按轉入帳戶的投資指示處理。一般而言，如你沒有在轉入帳戶設定任何有效的投資指示，轉入該帳戶的權益將按照預設投資策略投資。如有需要，請在申請轉移後立即更新你的投資指示。

強積金計劃 B

成員帳戶號碼



BBB 公司

帳戶類別

一般僱員

下一步

選擇轉移類別

選擇轉出
權益的帳戶

選擇轉入權益的
帳戶

核對資料並提交

核對資料，然後按「提交」



強積金計劃 A

受託人 A

帳戶類別：個人帳戶

 編輯

第2步：選擇轉入權益的帳戶



所選帳戶詳情



強積金計劃 C

受託人 C

帳戶類別：一般僱員

 編輯

你是否需要提交中介人資料？



是



否

提交



選擇轉移類別

選擇轉出
權益的帳戶

選擇轉入權益的
帳戶

確認並提交

細閱條款及細則，並按「接受」

你的轉移申請已成功提交



條款及細則

點擊「接受」按鈕，即表示閣下確認已閱讀並同意受以下條款及細則約束。

條款及細則
1. 本人同意將強積金帳戶內之全部權益轉出，並轉入另一強積金帳戶。
2. 本人同意將強積金帳戶內之全部權益轉出，並轉入另一強積金帳戶。
3. 本人同意將強積金帳戶內之全部權益轉出，並轉入另一強積金帳戶。
4. 本人同意將強積金帳戶內之全部權益轉出，並轉入另一強積金帳戶。
5. 本人同意將強積金帳戶內之全部權益轉出，並轉入另一強積金帳戶。
6. 本人同意將強積金帳戶內之全部權益轉出，並轉入另一強積金帳戶。
7. 本人同意將強積金帳戶內之全部權益轉出，並轉入另一強積金帳戶。
8. 本人同意將強積金帳戶內之全部權益轉出，並轉入另一強積金帳戶。
9. 本人同意將強積金帳戶內之全部權益轉出，並轉入另一強積金帳戶。
10. 本人同意將強積金帳戶內之全部權益轉出，並轉入另一強積金帳戶。

接受

拒絕

成員平台

e. 更改投資指示



更改投資指示

成員可在積金易平台更改投資指示，包括「**基金轉換／重組投資組合**」及「**更改未來供款的投資組合**」。



更改現有帳戶結餘的投資組合

選擇計劃及帳戶

選擇基金轉換／
重組投資組合

選擇轉入基金



更改未來供款的投資組合

選擇計劃及帳戶

選擇更改未來供款的投資組合

選擇計劃及帳戶

選擇基金轉換/重組投資組合

選擇轉入基金

選擇「投資」。然後到「基金轉換／重組投資組合」頁面。

投資

請按你的需要選擇投資指示。



基金轉換／重組投資組合

更改你現有帳戶結餘的投資組合，你可選擇指定基金轉換或單次投資組合重組



更改未來供款的投資組合

為未來的供款設定新的投資分配指示，而原有強積金的投資分配則維持不變

選擇計劃及帳戶

選擇基金轉換/重組投資組合

選擇轉入基金

選擇帳戶，然後按「下一步」。

選擇計劃及帳戶

請選擇你想要作出基金轉換／重組投資組合的強積金帳戶。

富達退休集成信託

自07 Nov 2023 | 成員帳戶號碼：

帳戶類別

個人帳戶

帳戶結餘（港幣）

\$ 20,383.71

[帳戶詳情](#)

下一頁

更改現有帳戶結餘的投資組合

選擇計劃及帳戶

選擇基金轉換/重組投資組合

選擇轉入基金

選擇基金轉換

請選擇基金，然後在適用的供款類別下輸入現有基金的轉出及轉入百分比。完成後請按「**下一步**」。

小貼士:

1. 如你要轉出多於一項基金，請按「**新增指示**」，然後輸入下一項基金指示的詳情。

基金轉換 / 重組投資組合

1 2 3

基金轉換指示

截至 11 / 12 / 2023

轉出 轉入

僱員強制性供款 僱員自願性供款

重組投資組合

65歲後基金 

基金結餘: \$ 9,441.83
(佔基金總結餘的37.50%)

100 %

亞洲均衡基金 

基金結餘: \$ 6,279.79
(佔基金總結餘的37.50%)

0 %

備註:

- 在作出投資選擇前，你必須辨別不同基金的風險級別，同時衡量自己可以承擔的風險水平
- 投資分配百分比必須為整數（例如：須為50%而非0.5%）
- 轉入總和應等於100%
- 你過往受僱工作的強積金供款已包括在「僱員強制性供款」及「僱員自願性供款」中（如有）

下一頁

1 新增指示

選擇計劃及帳戶

選擇基金轉換/重組投資組合

選擇轉入基金

選擇重組投資組合

可就強積金戶口的全部現有累算權益揀選新的投資分配百分比。

若選擇重組投資組合，選擇「轉出」分頁開啓「重組投資組合」按鈕。

小貼士：

重組投資組合—根據新的基金分配指示，改變現有強積金的投資組合。首先是根據指示贖回現有的強積金，然後重新投資，以達致要求的基金分配比例。



基金轉換指示

截至 11 / 12 / 2023

轉出

轉入

僱員強制性供款

僱員自願性供款

☒ 重組投資組合

65歲後基金

基金結餘：\$ 9,441.83
(佔基金總結餘的37.50%)

100 %

亞洲均衡基金

基金結餘：\$ 6,279.79
(佔基金總結餘的37.50%)

100 %

備註：

- 在作出投資選擇前，你必須辨別不同基金的風險級別，同時衡量自己可以承擔的風險水平
- 投資分配百分比必須為整數（例如：須為50%而非50.5%）
- 轉入總和應等於100%
- 你過往受僱工作的強積金供款已包括在「僱員強制性供款」及「僱員自願性供款」中（如有）

下一頁

新增指示

更改現有帳戶結餘的投資組合

選擇計劃及帳戶

選擇基金轉換/重組投資組合

選擇轉入基金

請選擇基金，然後在適用的供款類別下輸入現有基金的轉入百分比。

完成後請按「**下一步**」，確認無誤後，按「**提交**」。

基金轉換/重組投資組合

1 2 3

基金轉換指示

截至 08 / 04 / 2024

轉出 轉入

僱主強制性供款 僱主自願性供款

☐ 套用到所有供款類別 ⓘ

⇅ 重設

預設投資策略 ⓘ ☐

如你選擇此成分基金作為獨立投資（而非預設投資策略的一部分），風險降低機制並不適用。

基金A	<input checked="" type="checkbox"/>	100 %
風險級別: 1		
基金B	<input checked="" type="checkbox"/>	0 %
風險級別: 3		

總和: 100%

下一步

[新增指示](#)

更改投資指示

成功提交指示

成功更改投資指示後， 在頁面看到已提交的交易記錄。



成功提交基金轉換指示

參考編號: SGD0808406000014291

提交日期及時間: 07/12/2023, 17:43

注意！

成員向積金易平台提交投資指示的截止時間為每個工作天的**下午四時正**。如積金易平台於工作天的截止時間或之後或於非工作天的任何時間收到指示，該指示將被視為於**下一個工作天**處理。

[前往我的紀錄](#)

將相同分配百分比套用到未來供款的投資組合

選擇計劃及帳戶

選擇更改未來供款的投資組合

選擇「投資」。然後到「更改未來供款的投資組合」頁面。

投資

請按你的需要選擇投資指示。



基金轉換／重組投資組合

更改你現有帳戶結餘的投資組合，你可選擇指定基金轉換或單次投資組合重組



更改未來供款的投資組合

為未來的供款設定新的投資分配指示，而原有強積金的投資分配則維持不變

選擇計劃及帳戶

選擇更改未來供款的投資組合

選擇帳戶，然後按「下一步」。

選擇計劃及帳戶

請選擇你想要更改未來供款的投資組合的強積金帳戶。

富達退休集成信託

自01 Jul 2023 | 成員帳戶號碼: [REDACTED]

帳戶類別

個人帳戶

帳戶結餘 (港幣)

\$ 15,879.40

[帳戶詳情](#)



強積金計劃 A

自01 Jul 2023 | 成員帳戶號碼: [REDACTED]

帳戶類別

個人帳戶

帳戶結餘 (港幣)

\$ 15,879.40

[帳戶詳情](#)

下一頁

選擇計劃及帳戶

選擇更改未來供款的投資組合

計劃成員可選擇成分基金並更改未來的供款投資分配。

小貼士：

1. 視乎個別強積金計劃的條款，僱員可全數或按比例地選擇預設投資策略。
2. 每款基金皆有顏色分類，顯示其風險程度。

更改未來供款的投資組合

截至 16 / 10 / 2023

僱員強制性供款 僱員自願性供款 僱主強制性供款

☐ 套用至所有供款類別 ⓘ

重設

預設投資策略 ⓘ 100 %

如你選擇此成分基金作為獨立投資（而非預設投資策略的一部分），風險降低機制並不適用。

易生活 ⓘ 0 %

風險級別：1

易生活 ⓘ 0 %

風險級別：3

易生活 ⓘ 0 %

風險級別：3

總和： 100%

下一頁

選擇計劃及帳戶

選擇更改未來供款的投資組合

核對未來的供款投資分配，確認無誤後，按「**提交**」。

確認

第一步：選擇計劃及帳戶

帳戶詳情



臨時僱員

臨時僱員 | 成員帳戶號碼:

帳戶類別: 臨時備付

帳戶結餘 (港幣) \$ 26,841.06

僱主名稱

臨時僱員

 編輯

第二步：更改未來供款的投資組合

未來供款的投資組合

雇員強制性供款

狀認投資策略

100%

僱員自願性供款

默认投资策略

100%

僱主強制性供款

默认投资策略

100%

僱主自願性供款

默认投资策略

100%

 編輯

提交

更改投資指示

成功提交指示

成功更改投資指示後， 在頁面看到已提交的交易記錄。

注意！

成員向積金易平台提交投資指示的截止時間為每個工作天的**下午四時正**。如積金易平台於工作天的截止時間或之後或於非工作天的任何時間收到指示，該指示將被視為於**下一個工作天**才收到。



成功提交未來供款的投資組合

參考編號：IMD1108414000021308

提交日期及時間：15/12/2023, 10:43

[前往我的紀錄](#)

[設定基金轉換／重組投資組合指示](#)

成員平台

f.通知及待辦事項



如何查閱我的通知及待辦事項？

通知

待辦事項



查閱通知

使用過濾功能

於通知頁面，查看各項更新及待處理事項。
除了電郵及流動短訊外，積金易平台與你的溝通亦會
於通知欄出現。



查閱通知

使用過濾功能

可以透過「**功能**」、「**狀態**」及「**日期**」來作篩選，
尋找所需資訊。

×

篩選

重設

功能	^
狀態	^
接收通知時期	^

選擇時期

06/09/2023 - 07/03/2024

📅

顯示結果

查閱待辦事項

使用過濾功能

於待辦事項頁面，查看各類待處理事項。

你有一個已儲存的待提交申請

功能

登記

僱主名稱

全新世界

計劃名稱

強積金計劃A

帳戶類別

一般僱員

參考編號

END2408412000040484_001

成員帳戶號碼

56476200

緊記填妥並提交你的申請。請注意，根據我們的資料保留政策，你儲存的資料將於以下到期日後自動刪除。

到期日：12/03/2024

查閱待辦事項

使用過濾功能

可以透過「計劃」、「功能」或者「日期」來作篩選，
尋找所需資訊。

篩選

計劃

功能

到期日

06 / 03 / 2024 - 07 / 03 / 2024

顯示篩選結果

待辦事項	
已存儲紀錄	未完成的各類申請並曾經作紀錄保存
第三方請求	強積金中介人透過積金易助理介面為計劃成員提交的各類申請審批
僱主請求 – 登記參加強積金計劃	僱主透過積金易平台為僱員登記參加強積金計劃
僱主請求 – 長期服務金/遣散費對沖	僱主發起長期服務金/遣散費對沖的請求
離職匯報	計劃成員為其供款帳戶作離職申報後的跟進事項
無人申索權益	計劃成員相關的未申索權益
待處理申請	申請證明文件未獲批 (被系統偵測含有病毒/文件無效), 需重新上載文件
供款提示	未完成提交的供款賬單

成員平台

g. 強積金報表



如何查閱我的強積金報表？

按「我的帳戶」，然後按「我的信件及報表」。



我的紀錄



我的信件及報表



帳戶管理



更多服務



積金易帳戶設定



聯絡我們

登出



帳戶概覽



我的強積金



待辦事項



我的帳戶

如何查閱我的強積金報表？

你可以於此頁面查閱你所有報表，亦可
「**下載**」相關報表到你的裝置。



如何查閱我的強積金報表？

你亦可以透過**計劃名稱、報表類別或日期**以作篩選，尋找所需報表。

重設

篩選

✕

計劃名稱

所有計劃

○

計劃A

受託人:

僱主帳戶號碼:

帳戶狀態: ACTIVE

○

計劃B

受託人:

僱主帳戶號碼:

帳戶狀態: ACTIVE

○

類別

周年權益報表

□

投诉及查詢

□

供款

□

發出時期

選擇期間

-

📅

顯示結果

5. 為計劃成員提供的 全方位支援服務

自助資訊



網上平台/流動應用程式
用戶指南



網上平台/流動應用程式
教學短片



積金易常見問題

客戶查詢及支援



在線支援



積金易客戶服務熱線



3個積金易服務中心

查詢途徑	詳情	服務時間
客戶服務熱線	183 2622	星期一至五: 上午9時 至 下午7時 星期六: 上午9時 至 下午1時 (星期日及公眾假期除外)
電郵地址	enquiry@support.empf.org.hk	
積金易服務中心	<p>香港島 香港灣仔皇后大道東248號大新金融中心6樓601B室</p> <p>九龍 九龍尖沙咀東部麼地道77號華懋廣場12樓1205-6室</p> <p>新界 新界荃灣楊屋道8號如心廣場第2座18樓1802A室</p>	開放時間: 星期一至五: 上午9時 至 下午6時 星期六: 上午9時 至 下午1時 (星期日及公眾假期除外)

6. 問答環節