



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
- ☐ 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 [FormMPF(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 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 at least 7 years
- ☐ keep relevant income details for employees for at least 6 months (including amount, breakdown and payment dates)
- ☐ keep details of terminated employees for at least 6 months (including name, address and employment period)

Others

- ☐ notify AIA of amendments to company particulars within 30 days of change (including but not limited to company name, registration / incorporation information, business address(es), phone/fax no.)
- ☐ distribute "General Information" booklet and member benefit statements to employees within 7 working days after you receive them from AIA (if applicable)

[^] Please note that a new version of Notification of Member Termination (the "Form") will be launched on 1 May 2025 due to abolition of MPF offsetting arrangement for the SP/LSP reimbursement arrangement. The new version of the Form which will be able to download at aia.com.hk must be used for any member termination and SP/LSP reimbursement request from that date onwards.



USEFUL GUIDELINES

Guidelines on filling out employer forms	Available at
List of Required Documents for Employer Application	aia.com.hk
Remittance Statement (for existing members)	→ Help & Support
Remittance Statement with pre-filled information (for existing members)	→ For Corporations
Remittance Statement (for new enrolled members)	→ Form Library
Remittance Statement with pre-filled information (for new enrolled members)	→ MPF
Advice for Electronic Submission	
Claim Form for Reimbursement of Long Service Payment/ Severance Payment	
Form for Change of Employer Particulars	
Guidelines on filling out member forms	Available at
Member Enrolment Form	aia.com.hk
	→ Help & Support
	→ For Corporations
	→ Form Library
	→ MPF
Investment Mandate Form	aia.com.hk
	→ Help & Support
	→ For Individuals
	→ Form Library
	→ MPF/ORSO/Macau Pension
	→ MPF
Guidelines on reading the Statements of Account	Available at
Member Quarterly Benefit Statement	aia.com.hk
Member Annual Benefit Statement	→ Help & Support
	→ For Individuals
	→ Form Library
	→ MPF/ORSO/Macau Pension
	→ MPF

USEFUL FORMS

Employer

	Available at	Submission Channel	
		By Post (with original signature)	By Fax
Application			
Employer Application Form - Group Companies Form - Employer Voluntary Contribution Set-up Form* - Transfer of Asset Form	aia.com.hk → Help & Support → For Corporations → Form Library → MPF	✓	✗
Authorized Signatory List		✓	✗
Monthly contributions and reporting			
Direct Debit Authorization	aia.com.hk	✓	✗
Advice for Electronic Submission	→ Help & Support → For Corporations	✓	✗
Remittance Statement (Existing Members)	→ Form Library → MPF	✓	✓
Remittance Statement (New Enrolled Members)		✓	✓
Others			
Change of Authorized Signatory List		✓	✗
Form for Change of Employer Particulars	aia.com.hk	✓	✓
Notification of MPF Scheme Member Termination*	→ Help & Support → For Corporations → Form Library → MPF	✓	✗
Claim Form for Reimbursement of Long Service Payment/Severance Payment		✓	✗

* For newly set up, change or cessation of voluntary contribution.

[^] Please note that a new version of Notification of Member Termination (the "Form") will be launched on 1 May 2025 due to abolition of MPF offsetting arrangement for the SP/LSP reimbursement arrangement. The new version of the Form which will be able to download at aia.com.hk must be used for any member termination and SP/LSP reimbursement request from that date onwards.

USEFUL FORMS

Member

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

EMPLOYER HOTLINE: (852) 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 → 1
Speak to a Customer Service Representative (general)	1 → 1 → 9

