



友邦(信託)有限公司

香港司徒拔道一號  
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AIA Company (Trustee) Limited

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**PRIVATE & CONFIDENTIAL**

Ref. No.: MF600/A12B34/WT2102GWZX/EEL-0001-000001-000001-000001-1/R1



CHAN TAI MAN  
1/F, AIA BUILDING  
1 STUBBS ROAD  
HONG KONG

**Important**  
**Please handle immediately**

5 April 2017

Dear CHAN TAI MAN,

**Important Note for Default Investment Strategy ("DIS") Re-investment Notice (the "Notice")**

Thank you for using AIA MPF Services.

We refer to our letter sent to you previously in relation to the new MPF legislation of **DIS**. As shown in our record, your accrued benefits, future contributions and future accrued benefits transferred from another scheme (the "Future Investments") are fully invested into the default fund, which is currently the Guaranteed Portfolio (the "Existing Default Fund").

With the implementation of DIS, **if we do not receive any specific investment instructions from you or your signed Option 2 Form in the attached Notice by 17 May 2017, your accrued benefits and the investment allocation for your Future Investments will be changed to DIS** according to the legislation. Therefore, please read the attached Notice which has set out your MPF account details and relevant DIS information carefully and make your choice before the aforesaid date.

However, kindly be reminded that should there be any relevant transaction processed during the transition period **between 1 April and 17 May 2017** which resulted in your accrued benefits no longer being fully invested into the Existing Default Fund (such as benefits being transferred from your other account(s) in the same MPF scheme or your investment instruction for future contributions has been applied), we may have to switch those benefits remaining in the Existing Default Fund and/or change your investment instruction for future contributions into the DIS **as soon as practicable** after we process such transaction (**disregarding whether the reply period stated in the Notice has expired**).

We would also like to remind you that before making your investment choices, you should consider your own risk tolerance level and financial circumstances. When you are in doubt as to whether a certain fund is suitable for you (including whether it is consistent with your investment objectives), you should seek financial and/or professional advice and choose the fund(s) most suitable for you taking into account your circumstances.

To help you better understand the differences between the Existing Default Fund and the DIS under AIA MPF - Prime Value Choice (the "Scheme"), we have listed out the key features of each relevant fund in the following table for your reference:

	Existing Default Fund	The DIS comprising CAF and A65F with a de-risking strategy	
Name	Guaranteed Portfolio	Core Accumulation Fund	Age 65 Plus Fund
Fund Type	Guaranteed Fund	Mixed Assets Fund – Global	Mixed Assets Fund – Global
De-risking Feature	No	Yes	Yes
Total Management Fees and, if applicable, Guarantee Charge	1.50% p.a. of NAV	0.75% p.a. of NAV	0.75% p.a. of NAV
Daily Fee Cap	No	Yes	Yes
Risk Level*	Low	Medium to high	Low to medium
Guarantee Feature	Yes - please refer to paragraph (h) "Features of the Guarantee" in Schedule 16 of the Principal Brochure	No	No

\* Please note that the risk profile of the two DIS funds (namely CAF and A65F) is relatively higher than that of the Existing Default Fund (namely Guaranteed Portfolio). The risk level categorization is determined on the basis of the risk profiles of all constituent funds under the Scheme. The risk levels are for reference only.

For details of the Existing Default Fund and the DIS, please refer to the Principal Brochure of the Scheme, which will be sent to you separately. In case you have not received the Principal Brochure and the supplementary materials, please call the following dedicated hotline. The Principal Brochure can also be downloaded from our website mpf.aia.com.hk.

If you have any questions, please call our DIS Hotline at 2200 6205.

Yours faithfully,

Stephen Fung  
Chief Executive Officer  
AIA Company (Trustee) Limited





私人密件

參考編號：MF600/A12B34/WT2102GWZX/EEL-0001-000001-000001-000001-2/R1

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重要通知  
請立即處理

親愛的陳大文：

### 預設投資策略重新投資通知書（「通知書」）重要通知

多謝選用友邦強積金服務。

我們早前曾發出有關強積金新法例預設投資策略的信函給你。我們的記錄顯示，你的累算權益、未來供款及未來轉移自另一個計劃的累算權益（「未來投資」）現正全數投資於預設基金，現時為保證組合（「現有預設基金」）。

隨著預設投資策略推出，如我們於2017年5月17日仍未收到你特定投資指示或簽妥的選擇2表格，你的累算權益及未來投資的投資分配，將按法例要求轉換至預設投資策略。因此，請仔細閱讀隨附已印有的強積金賬戶資料的通知書及預設投資策略的相關資料，並於上述日期前作出選擇。

然而，請留意如你在2017年4月1日至5月17日的過渡期內進行任何相關交易，導致你的累算權益不再全數投資於現有預設基金（例如有累算權益轉移自你在同一計劃下之其他賬戶或你未來投資之投資指示得以應用），無論於通知書上指明的回覆期是否已屆滿，我們有可能需要在妥善處理該等交易後，儘快將你其餘仍然投資於現時預設基金的累算權益調配至預設投資策略及/或將未來投資之投資指示轉為預設投資策略。

我們亦藉此提醒你，在作出投資決定前，你必須衡量個人可承受風險的程度及你的財政狀況。在選擇基金時，如你就某一項基金是否適合你（包括是否符合你的投資目標）有任何疑問，應徵詢財務及/或專業人士的意見，並因應你的個人狀況而選擇最適合你的基金。

為讓你更瞭解友邦強積金優選計劃（「計劃」）的現有預設基金與預設投資策略的不同之處，我們在下表列出各項基金的主要特點，以供參考：

	現有預設基金	「預設投資策略」- 包括採用降低風險機制的核心累積基金及65歲後基金	
名稱	保證組合	核心累積基金	65歲後基金
基金類別	保證基金	混合資產基金 - 環球	混合資產基金 - 環球
降低風險特點	沒有	有	有
基金管理費總額及保證費，如適用	每年為淨資產值的1.50%	每年為淨資產值的0.75%	每年為淨資產值的0.75%
每日收費上限	沒有	有	有
風險水平*	低	中至高	低至中
保證特點	有 - 請參閱主要說明書之附表十六(h)段「保證的特色」	沒有	沒有

\*請注意，兩項預設投資策略基金（「核心累積基金」及「65歲後基金」）的風險水平比現有預設基金（「保證組合」）的風險水平相對較高。風險水平級別是根據本計劃下所有成分基金的風險資料而決定，並僅供參考。

有關現有預設基金和預設投資策略之詳細資料，請參閱另行郵寄給你的計劃主要說明書。如你未收到主要說明書及補充資料，請致電下述的專屬查詢熱線，亦可到我們的網站mpf.aia.com.hk下載主要說明書。

如有任何問題，請致電我們的預設投資專屬查詢熱線2200 6205。



馮裕祺  
友邦(信託)有限公司  
行政總裁

2017年4月5日



Ref. No.: MF600/A12B34/WT2102GWZX/EEL-0001-000001-000001-000001-3/R1

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5 April 2017

Dear CHAN TAI MAN,

**Important**  
Please handle immediately

**DIS RE-INVESTMENT NOTICE  
MANDATORY PROVIDENT FUND SCHEMES ORDINANCE**

This DIS Re-investment Notice (the "Notice") is important as it deals with how your Mandatory Provident Fund ("MPF") benefits may be affected by the Default Investment Strategy as set out in the Mandatory Provident Fund Schemes Ordinance (the "Ordinance"). You should read it carefully, and in particular note the impact explained in paragraph 4 about what happens if no action is taken by you within 42 days. You are also reminded to consider it in conjunction with the Principal Brochure of the MPF Scheme mentioned below.

This Notice is sent to you by us, the approved trustee of your MPF Scheme, in relation to your MPF account listed below, under sections 34DI and 34DJ of the Ordinance because:

- a) as at 1 April 2017, all of the accrued benefits in your account listed below were invested according to the Default Investment Arrangement of the Scheme and have since remained so invested;
- b) we have not received any investment instructions from you to invest the accrued benefits in the account in constituent funds according to your selection as permitted under the governing rules; and
- c) you were under 60 years of age or became 60 years of age on 1 April 2017.

**Your MPF Account Details**

Name of scheme member : CHAN TAI MAN  
 Account number of scheme member : 001123456/01  
 Date of birth (dd/mm/yyyy) : 01/01/1985  
 Name of scheme : AIA MPF - Prime Value Choice (the "Scheme")  
 Name of approved trustee : AIA Company (Trustee) Limited  
 Default Investment Arrangement details :

**Your investment holdings as at 1 APR 2017**

Constituent Fund	Investment Allocation
Guaranteed Portfolio	100%
<b>Total</b>	<b>100%</b>

**Why you are getting this Notice**

1. Amendments to the Ordinance in 2016 provide for the establishment of a new investment arrangement called the Default Investment Strategy (the "DIS") in all MPF schemes. In essence, the DIS has been designed as a standardized investment arrangement that applies to accrued benefits in accounts where the scheme member has not given any investment instructions.
2. Details of the DIS, including its automatic de-risking characteristics and fee controls, were sent to scheme members in the notice in December 2016 setting out changes to the governing rules and Principal Brochure of the Scheme ("Amendment Notice"). If you do not have a copy of the Amendment Notice, a copy of it is available on our website at mpf.aia.com.hk or can be obtained by calling our Member Hotline at 2200 6288.
3. Under the Ordinance, as the approved trustee of the Scheme, we must, by 3 October 2017 give you this Notice so that you can understand the impact of this change on your account.

**The impact on your account**

4. **If, by 17 May 2017, i.e. 42 days after the date of this Notice, we have not received any specific investment instructions from you for the accrued benefits in your account and all of the accrued benefits in your account continue to be invested according to the Default Investment Arrangement of the Scheme set out under "Your MPF Account Details" above, we must, by 31 May 2017, i.e. 14 days after 17 May 2017, invest those benefits according to the DIS.** We are required to invest those benefits according to the DIS and any investment instruction received by us after 17 May 2017 can only be carried out after the benefits have been first invested according to the DIS, providing that such investment instruction is still a valid instruction. There is potential investment gain or loss since the processes of investing according to the DIS will involve selling units from the existing Default Investment Arrangement fund(s) then purchasing units in the DIS funds at prevailing prices.





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5. Further, if accrued benefits referred to in paragraph 4 are invested according to the DIS, this will also affect how future contributions or accrued benefits transferred from another scheme are invested. Contributions received or accrued benefits transferred from another scheme into the account after the date on which the accrued benefits referred to in paragraph 4 are invested according to the DIS will also be invested according to the DIS unless we receive specific investment instructions from you to invest them in some other way. You should note that special rules apply in some cases where benefits are transferred between accounts (e.g. between a contribution account and a personal account) within the 42-day period. If this applies to you, we will advise you accordingly.
6. The accrued benefits in your account are fully invested in a guaranteed fund (i.e. Guaranteed Portfolio). According to section 34DK of the Ordinance, we shall not invest those benefits according to the DIS, if, on 17 May 2017 the market value of those benefits is less than the value guaranteed by the fund to be paid to you on that day. In that case, those benefits shall stay in the guaranteed fund unless or until you give investment instructions to invest them in some other way. However, according to the guarantee features of the Guaranteed Portfolio, the market value of those benefits in the Guaranteed Portfolio is the same as the guaranteed value daily. Therefore, as set out in paragraphs 4 and 5 above, we will invest the accrued benefits in your account according to the DIS unless you give investment instructions to invest them in some other way.

#### What you need to do – your options

7. **Option 1 – Take no action and be invested in DIS**  
You are not required to do anything, however, if you do not take any action, then as set out in paragraphs 4 and 5 above, the accrued benefits in your account will be automatically re-invested according to the DIS and future contributions and transfers will also be invested according to the DIS.
8. **Option 2 – Stay invested in the existing constituent funds**  
If you want the accrued benefits in your account and future contributions and transfers to stay invested in the existing constituent funds, as set out under "Your MPF Account Details" above, then you need to complete and return the attached **Option 2 Form** to us by 17 May 2017. This Form can be returned by post to the address indicated on the form or by fax. This Form can only be acted on by us if it is received by us by 17 May 2017. Accordingly, if you are replying by post, please allow adequate time and affix sufficient postage for postal delivery so that it can be received by us by 17 May 2017. After receiving your Option 2 Form, we will send you a confirmation letter to confirm your investment instruction. If you want to invest in the existing constituent funds after your accrued benefits and contributions and transfers have been invested according to the DIS, you are free to do so at any time by giving us an investment instruction.
9. You are reminded that if you want to re-invest the accrued benefits in your account into some other constituent funds, you are free to give us investment instructions to do so at any time, whether before or after 17 May 2017, by logging into mpf.aia.com.hk, calling our Interactive Voice Response system at 2200 6288 or completing and returning an Investment Mandate Form to us at 1/F, AIA Building, 1 Stubbs Road, Hong Kong. Please note, however, as set out in paragraph 4 above, any investment instructions in relation to existing benefits received by us after 17 May 2017 can only be carried out after those benefits have been first invested according to the DIS.
10. As always, when making decisions about how to invest the accrued benefits in your MPF account, you should obtain the necessary information from the Principal Brochure of the Scheme and consider whether you need to obtain independent advice. Please note that the DIS does not provide any guarantee on the capital or return and investments in the DIS are subject to risks that are different from the risks of other investment strategies and constituent funds (including, for example, the impacts of the de-risking process and a different risk profile from the previous Default Investment Arrangement). These risks are set out more fully in the Principal Brochure of the Scheme and in paragraph 4 above.
11. If you have any enquiries about what is set out in this Notice, please call our DIS Hotline at 2200 6205.

Yours faithfully,

Stephen Fung  
Chief Executive Officer  
AIA Company (Trustee) Limited



參考編號：MF600/A12B34/WT2102GWZX/EEL-0001-000001-000001-000001-5/R1

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親愛的陳大文：

重要通知  
請立即處理

預設投資策略重新投資通知書  
《強制性公積金計劃條例》

本預設投資策略重新投資通知書（「通知書」）為重要文件，內容關乎《強制性公積金計劃條例》（《條例》）所訂明的預設投資策略，對你的強制性公積金（「強積金」）權益可能會有何影響。請小心細閱本通知書，尤其注意下文第4段所述情況，即假如你沒有在42日內採取任何行動，會對你有何影響。請同時參考下述強積金計劃的主要說明書。

我們（即你的強積金計劃的核准受託人）根據《條例》第34DI及34DJ條，就你下列的強積金賬戶向你發出本通知書，原因是：

- a) 在2017年4月1日，你下列的強積金賬戶內的所有累算權益，均按照該計劃的預設投資安排進行投資，其後亦一直按照該項安排進行投資；
- b) 我們沒有收到你任何投資指示，以按照你在管限規則所准許的範圍內作出的選擇，將該賬戶內的累算權益投資於所選的成分基金；及
- c) 你在2017年4月1日當日未滿60歲，或在當日才滿60歲。

你的強積金賬戶資料

計劃成員姓名 : 陳大文  
 計劃成員賬戶編號 : 001123456/01  
 出生日期(日/月/年) : 01/01/1985  
 計劃名稱 : 友邦強積金優選計劃（「計劃」）  
 核准受託人名稱 : 友邦(信託)有限公司  
 預設投資安排詳情 :

你的投資權益（截至2017年4月1日）

成分基金	投資分配
保證組合	100%
總數	100%

你為何會收到本通知書

1. 根據《條例》在2016年所作的修訂，所有強積金計劃均須設立一項名為「預設投資策略」的新投資安排。預設投資策略基本上是一套劃一的投資安排，在計劃成員沒有就賬戶內的累算權益給予任何投資指示的情況下適用。
2. 預設投資策略的詳情（包括其自動降低風險機制及費用管制詳情）載於修訂計劃管限規則及主要說明書的通知書（「修訂通知書」）。修訂通知書已於2016年12月寄送予計劃成員，如你尚未取得修訂通知書，可於我們的網站mpf.aia.com.hk查閱，或致電成員熱線2200 6288索取。
3. 根據《條例》，我們（即計劃的核准受託人）必須在2017年10月3日或之前向你發出本通知書，以說明這項新投資安排對你的賬戶有何影響。

對你的賬戶有何影響

4. 若我們在2017年5月17日（即本通知書的日期後的42日）或之前，仍未收到你就你賬戶內的累算權益給予的任何特定投資指示，而你賬戶內的所有累算權益繼續按照計劃的預設投資安排（即上文「你的強積金賬戶資料」所述的預設投資安排）投資，我們必須在2017年5月31日（即2017年5月17日之後的14日）或之前，按照預設投資策略將該等權益投資。由於我們須按照預設投資策略將該等權益投資，因此我們在2017年5月17日後收到的任何投資指示，只可在該等權益已經先按照預設投資策略進行投資後（而該投資指示仍然有效的前提下）才可執行。在按照預設投資策略進行投資的過程中，由於須按市價賣出現行預設投資安排基金的單位，然後按市價買入預設投資策略基金的單位，因此可能會產生投資收益或虧損。





參考編號：MF600/A12B34/WT2102GWZX/EEL-0001-000001-000001-000001-6/R1

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- 此外，若按照預設投資策略將第4段所述的累算權益投資，這亦會影響日後的供款或從另一計劃轉入的累算權益的投資安排。除非我們收到你要求作出其他投資安排的特定投資指示，否則在按照預設投資策略將第4段所述的累算權益投資當日後收到的供款，或在當日後從另一計劃轉入該賬戶的累算權益，亦會按照預設投資策略投資。請注意，若於該42日期內在賬戶之間轉移權益（例如在供款賬戶與個人賬戶之間轉移權益），在某些情況下須遵從特別規則。如你出現這情況，我們會另行通知你。
- 你賬戶內的全部累算權益現正投資於一項保證基金（即保證組合）。根據《條例》第34DK條，如該等權益在2017年5月17日的市值，是少於有關基金在該日保證會向你支付的價值，則我們不會按照預設投資策略為該等權益進行投資。在此情況下，除非或直至你給予投資指示，要求作出其他投資安排，否則該等權益將繼續投資於保證基金。但根據保證組合的保證特色，成員在保證組合的結餘市值相等於每日保證價值。因此，除非你給予投資指示，要求作出其他投資安排，否則我們將按照上文第4及5段所述，按照預設投資策略為你賬戶內的累算權益進行投資。

### 你要做甚麼—你的選擇

#### 選擇1—不採取任何行動，按照預設投資策略投資

- 你毋須採取任何行動。不過，若你不採取任何行動，你賬戶內的累算權益便會按照上文第4及5段所述，自動按照預設投資策略重新投資，而日後的供款及轉入賬戶的權益，亦會按照預設投資策略投資。

#### 選擇2—繼續投資於現行的成分基金

- 若你希望你賬戶內的累算權益及日後的供款及轉入賬戶的權益，繼續投資於現行的成分基金（即上文「你的強積金賬戶資料」所述安排），你須在2017年5月17日或之前填妥及交回隨函夾附的**選擇2表格**。此表格可郵寄至表格上所示的地址或以傳真方式交回。我們必須在2017年5月17日或之前收到此表格，才會執行你在表格內給予的指示。因此，若選擇以郵遞方式交回表格，請為郵件派遞預留充裕時間及為郵件付上足夠郵資，以確保我們在2017年5月17日或之前收到表格。我們收到你的選擇2表格後，將發出一封確認信以確認你的投資指示。在按照預設投資策略投資你的累算權益及供款及轉入賬戶的權益後，若你希望投資於現行的成分基金，可隨時給予我們投資指示。
- 請注意，若你希望將你賬戶內的累算權益重新投資於其他成分基金，可隨時（不論在2017年5月17日前或後）登入[mpf.aia.com.hk](http://mpf.aia.com.hk)、致電互動語音回應系統2200 6288或填妥一份投資委託書並寄回香港司徒拔道一號友邦大廈一樓，給予我們投資指示。不過，一如上文第4段所述，若我們在2017年5月17日後收到你就現有權益給予的投資指示，則必須在該等權益已按照預設投資策略進行投資後，才可執行該等指示。
- 一如以往，在決定如何投資你的強積金賬戶內的累算權益時，應細閱計劃的主要說明書，以獲取所需資料，並考慮是否需要徵詢獨立意見。請注意，預設投資策略不設任何資本或回報保證，其投資風險與其他投資策略及成分基金所涉及的風險亦有所不同（例如降低風險的過程所帶來的影響，而預設投資策略的風險概況亦有別於之前的預設投資安排）。有關預設投資策略的風險詳情，可參閱計劃的主要說明書及上文第4段。
- 若你對本通知書的內容有任何查詢，請致電我們的預設投資專屬查詢熱線2200 6205。



馮裕祺  
友邦（信託）有限公司  
行政總裁

2017年4月5日



Ref. No.: MF600/A12B34/WT2102GWZX/EEL-0001-000001-000001-000001-7/R1

**Important**  
Please handle immediately

**DIS Re-investment Notice  
Option 2 Form**

**Note:**

- 1) *You only need to complete and send this Form to us if you wish to stay invested in the existing constituent fund, i.e. proceed with Option 2 as described in paragraph 8 of the DIS Re-investment Notice. If you have any enquiries about this form, please call our DIS Hotline at 2200 6205.*
- 2) *The personal data you provide in this form is to be collected and utilized in accordance with the AIA Personal Information Collection Statement ("AIA PIC"). Please refer to the enclosed AIA PIC for details.*

To : AIA Company (Trustee) Limited, AIA MPF - Prime Value Choice  
 Address : 1/F, AIA Building, 1 Stubbs Road, Hong Kong  
 Fax No. : 2565 0001

**MPF Account Details**

Name of scheme member : CHAN TAI MAN  
 Account number of scheme member : 001123456/01  
 Date of birth (dd/mm/yyyy) : 01/01/1985  
 Name of scheme : AIA MPF - Prime Value Choice (the "Scheme")  
 Name of approved trustee : AIA Company (Trustee) Limited  
 Default Investment Arrangement details :

**Your investment holdings as at 1 APR 2017**

Constituent Fund	Investment Allocation
Guaranteed Portfolio	100%
<b>Total</b>	<b>100%</b>

I have read and understood the DIS Re-investment Notice dated 5 April 2017.

In respect of the existing accrued benefits in my account, the details of which are set out under "MPF Account Details" above, I hereby instruct you that these benefits are to stay invested in the existing constituent fund of the Default Investment Arrangement as set out above.

I note that this instruction also applies to future contributions and accrued benefits transferred from another scheme into the account. This instruction stays in force unless, or until, I make some other investment instructions in the manner set out in paragraph 9 of the DIS Re-investment Notice.

\_\_\_\_\_  
Signature of the Scheme Member

\_\_\_\_\_  
Date

Note: Please note that for any future instruction/ request received from you, we will base on the signature specimen in our record if such specimen differs from that you made on the Option 2 Form.





參考編號：MF600/A12B34/WT2102GWZX/EEL-0001-000001-000001-000001-8/R1

**重要通知**  
請立即處理

**預設投資策略重新投資通知書**  
**選擇2表格**

注意：

- 1) 如希望繼續投資於現行的成分基金（即預設投資策略重新投資通知書第8段所述的選擇2），你只須填妥並向我們交回本表格。如對此表格有任何問題，請致電我們的預設投資專屬查詢熱線 2200 6205。
- 2) 你於此表格提供的個人資料，將根據友邦保險收集個人資料聲明收集及使用。詳情請參考附件的友邦保險收集個人資料聲明。

致：友邦（信託）有限公司，友邦強積金優選計劃  
地址：香港司徒拔道一號友邦大廈一樓  
傳真號碼：2565 0001

**強積金賬戶資料**

計劃成員姓名：陳大文  
計劃成員賬戶編號：001123456/01  
出生日期(日/月/年)：01/01/1985  
計劃名稱：友邦強積金優選計劃（「計劃」）  
核准受託人名稱：友邦(信託)有限公司  
預設投資安排詳情：

**投資權益（截至2017年4月1日）**

成分基金	投資分配
保證組合	100%
總數	100%

本人已細閱及明白日期為2017年4月5日的預設投資策略重新投資通知書的內容。

本人謹此作出指示，要求核准受託人將本人賬戶內的現有累算權益（詳見上列的「強積金賬戶資料」），繼續投資於上列的預設投資安排的現行成分基金。

本人知悉，這項指示亦適用於日後存入該賬戶的供款及從另一計劃轉入該賬戶的累算權益。除非或直至本人按預設投資策略重新投資通知書第9段所述的方式給予其他投資指示，否則這項指示一直有效。

計劃成員簽署

日期

備註：如選擇2表格上的簽名與我們記錄的簽名式樣不符，我們將使用記錄中的簽名式樣來處理你日後的指令/請求。

