



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)

Employer Hotline : (852) 2100 1888



View e-copy

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

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

