

The provision of information and other personal data by you is on a voluntary basis. However, failure to provide information and other personal data as requested may result in your application/instruction not being able to be processed. The information and other personal data provided by you will only be accessed and handled by Principal Trust Company (Asia) Limited (“the Trustee”) and its affiliate(s), Principal Insurance Company (Hong Kong) Limited (“the sponsor”) (collectively, “the Companies”), AXA China Region Insurance Company Limited and its subsidiary intermediaries and the relevant persons/entities stated herein below.

The information and other personal data collected from you from time to time will be used for the purposes of: (1) processing your application for participation under Principal MPF – Smart Plan (“the Scheme”); (2) administering and managing your contributions and accrued benefits under the Scheme; (3) carrying out your instructions or responding to any enquiries given or purporting to be given by you or on your behalf; (4) direct marketing of mandatory provident fund (“MPF”), retirement schemes, MPF and retirement schemes related services and products of the Trustee and its member company(ies); (5) providing MPF and retirement schemes related services; (6) maintaining statistical data and providing a database for product and market research; (7) compliance with applicable laws, regulations, guidelines or guidance given or issued by any legal, regulatory, governmental, tax, law enforcement or other authorities, or self-regulatory or industry bodies or associations of financial services providers within or outside the Hong Kong Special Administrative Region (“Hong Kong”), including but not limited to the Foreign Account Tax Compliance Act and the Common Reporting Standard; and (8) any other purposes relating or incidental to the above.

Furthermore, for the purpose of automatic exchange of financial account information, such information and information regarding the account holder and any reportable account(s) may be reported by the Trustee to the Inland Revenue Department of the Government of Hong Kong (“IRD”) and exchanged with the tax authorities of another jurisdiction or jurisdictions in which the account holder may be resident for tax purposes, pursuant to the legal provisions for automatic exchange of financial account information provided under the Inland Revenue Ordinance (Cap. 112 of the Laws of Hong Kong). You shall advise the Trustee and/or individual or entity authorised by the Trustee (including but not limited to third party service providers, the Trustee’s affiliates, subsidiaries, associated entities, and any of their branches and offices) (each, an “authorised person”) of any change in circumstances which affects the tax residency status of the account holder, and to provide the Trustee and/or its authorised person(s) with a suitably updated self-certification form within 30 days of such change in circumstances.

You may visit the IRD website that sets out information relating to the implementation of automatic exchange of financial account information in Hong Kong: http://www.ird.gov.hk/eng/tax/dta_aeoi.htm.

Your personal data may also be transferred/disclosed to the following parties (whether within or outside

Hong Kong) for any of the purposes stated above: (1) any agent, contractor, third party service provider, or any company(ies) within the same group of companies to which the Trustee belongs, which provides trustee, administrative, telecommunications, computer, data processing or storage, marketing, professional or other services to the Trustee in connection with their business operations, including but not limited to the eMPF Platform; (2) any person to whom the Trustee and/or its authorised person(s) is under an obligation to make disclosure under the requirements of any laws and regulations binding on the Trustee and/or its authorised person(s) or under and for the purposes of any guidelines issued by regulatory, tax or other authorities with which the Trustee and/or its authorised person(s) are expected to comply; and (3) any actual or proposed assignee of the Trustee or participant or sub-participant or transferee of the rights of the Trustee in respect of you.

Your personal data (name, contact details and account records) may be used for direct marketing of MPF products, retirement schemes, MPF and retirement schemes related services and products of the Trustee and its member company(ies) only with your consent. If you wish to update the use of your personal data for direct marketing purpose, you may exercise your right by notifying the eMPF Platform through contacting the eMPF Customer Service Hotline at (852) 183 2622 or visiting the eMPF Service Centres during service hours. The following are the locations of the eMPF Service Centres:

Hong Kong Island: Unit 601B, 6/F, Dah Sing Financial Centre, No. 248 Queen's Road East, Wanchai, Hong Kong

Kowloon: Suites 1205-6, 12/F, Chinachem Golden Plaza, No. 77 Mody Road, Tsim Sha Tsui East, Kowloon

New Territories: Suite 1802A, 18/F, Tower 2, Nina Tower, No. 8 Yeung Uk Road, Tsuen Wan, New Territories

In addition, under the Personal Data (Privacy) Ordinance (Cap. 486 of the Laws of Hong Kong), you have a right to request access to and correction of any of your personal information held by the Companies and to request not to use your personal data for direct marketing purpose as stated above. The aforesaid requests can be made in writing to: Data Protection Officer, Principal Trust Company (Asia) Limited, 30/F, Millennium City 6, 392 Kwun Tong Road, Kwun Tong, Kowloon, Hong Kong. If you have any questions or wish to know more about our privacy policy, please send your enquiry to the above address or contact us at (852) 2802 2812.

閣下提供的資料及其他個人資料純屬自願性質。然而，如未能提供所需資料及其他個人資料，可能導致閣下的申請/指示不獲處理。閣下提供的資料及其他個人資料僅供信安信託(亞洲)有限公司(「受託人」)及其聯屬公司、美國信安保險有限公司(「保薦人」)(統稱「公司」)、安盛金融有限公司及其附屬中介人及以下所指的相關人士/機構使用及處理。

向閣下不時所收集的資料及其他個人資料將會用作下列用途：(1) 處理閣下參與信安強積金 - 明智之選(「該計劃」)的申請；(2) 處理及管理閣下於該計劃的供款及累算權益；(3) 執行閣下的指示或回覆閣下或閣下代表所提出或聲稱為其提出的任何查詢；(4) 直接促銷受託人及其成員公司的強制性公積金(「強積金」)、退休計劃、強積金及退休計劃的相關服務及產品；(5) 提供強積金及退休計劃的相關服務；(6) 維持統計數據及用作產品及市場研究資料庫；(7) 遵守有關不論於香港特別行政區(「香港」)境內或境外的任何法律、監管、政府、稅務、執法或其他機關，或金融服務供應商的自律監管或行業組織或協會作出或發出的任何適用的法律、規則、指引或指導，包括但不限於《海外帳戶稅收合規法案》及共同匯報標準；及 (8) 用作與任何上述有關或附帶的用途。

此外，受託人可根據《稅務條例》(香港法例第 112 章)有關自動交換財務帳戶資料的法律條文，及作自動交換財務帳戶資料用途，把該等資料和關於帳戶持有人及任何須申報帳戶的資料向香港政府稅務局(「稅務局」)申報，從而把資料轉交到帳戶持有人可能為稅務居民的管轄區之稅務當局。如情況有所改變，以致影響帳戶持有人的稅務居民身分，閣下須通知受託人及/或獲受託人授權的個體或機構(包括但不限於第三方服務供應商、受託人的聯屬公司、附屬公司、關聯實體公司及彼等的任何分支機構和辦事處)(各稱為「獲授權人士」)，並須在情況發生改變的 30 日內，向受託人及/或其獲授權人士提交一份已適當更新的自我證明表格。

閣下可參閱稅務局網站 http://www.ird.gov.hk/chi/tax/dta_aeoi.htm 以了解香港實施自動交換財務帳戶資料的詳情。

閣下的個人資料亦可能轉移/披露予以下的人士(不論在香港內外)作為上述所載的任何用途：(1) 在業務營運上向受託人提供受託、行政、電訊、電腦、數據處理或儲存、市場推廣、專業或其他服務的任何代理、承包商、第三方服務供應商或受託人所屬公司集團旗下的任何公司(包括但不限於積金易平台)；(2) 就受託人及/或其獲授權人士所需遵守的任何法律及規則要求，或按監管、稅務或其他主管機關要求受託人及/或其獲授權人士需遵守的任何指引，受託人及/或其獲授權人士因而有責任要向其披露的任何人士；及 (3) 任何受託人的實際或建議承讓人或受託人就閣下權益的分享者、再分享者或受讓人。

只有在閣下的同意下，閣下的個人資料(姓名、聯絡資料和戶口記錄)或會用於直接促銷受託人及其成員公司的強積金產品、退休計劃、強積金及退休計劃相關的服務和產品。如閣下希望更新使用閣下的個人資料作直接促銷之用途，閣下可透過致電積金易客戶服務熱線(852) 183 2622 或於服務時間內到訪積金易服務中心，通知積金易平台以行使閣下的權利。積金易服務中心地點如下：

香港島：香港灣仔皇后大道東 248 號大新金融中心 6 樓 601B 室

九龍：九龍尖沙咀東麼地道 77 號華懋廣場 12 樓 1205-6 室

新界：新界荃灣楊屋道 8 號如心廣場二期 18 樓 1802A 室

此外，根據《個人資料(私隱)條例》(香港法例第 486 章)，閣下有權要求查閱及更正公司所持有閣下的個人資料及要求閣下的個人資料不被用作上述的直接促銷用途。上述要求可以書面形式通知信安信託(亞洲)有限公司的保障資料主任(香港九龍觀塘觀塘道 392 號創紀之城 6 期 30 樓)。閣下如有任何疑問或欲進一步了解本公司的私隱政策，請將閣下的查詢發送到上述地址或致電(852) 2802 2812 與本公司聯絡。