

THE ASSOCIATION

The HKRSA was established in 1996 and is a not-for-profit, non-political association. Our mission is to promote sustainable and better retirement outcomes and get more value out from the retirement system through the following:

- Empower – We empower employees through employers with retirement planning and tools.
- Advocate – We advocate key retirement issues, retirement income and look for value creation.
- Share – We share and facilitate retirement information and knowledge.

RETIREMENT BENEFITS DEVELOPMENT

With the introduction of the Mandatory Provident Fund (MPF), retirement benefits for employees in Hong Kong are being accumulated, even if slowly. Much needs to be done to ensure:

- best practices are identified, explained, understood and applied;
- employees realise that individually, they are responsible for their own retirement planning;
- the community appreciates fully how very important retirement planning is for the people of Hong Kong.

3-YEAR OBJECTIVES

- To retain as members 50% or above of large ORSO/MPF schemes, including the major retirement schemes in Hong Kong, thus representing one million plus members.
- To act as a thought leader for research and Government policy in the area of retirement protection.
- To promote best practice in the management of retirement protection, including communication and corporate governance issues.
- To promote professional education and training in retirement protection.

- To build partnership with retirement organizations and align strategically with Greater China and other national pension scheme associations, to increase our knowledge and thereby our influence.
- To go in partnership with the MPFA to promote investment education in secondary education/education institutes.

MEMBERSHIP BENEFITS

- Membership of an industry association representing your views and helping to shape policy on key issues.
- Education programme and seminar training workshops.
- Topical workshops, conferences and seminars.
- Luncheon forums with guest speakers.
- Newsletters and bulletins.
- Networking opportunities.

CORPORATE MEMBERSHIP AND JOINING

Any corporate with an interest in the objectives of the HKRSA may join as a Corporate Member.

Typically, financial industry members include: Insurance Companies, Banks, Fund and Asset Managers, Trustees, Lawyers, Auditors.

Non-financial industry members are drawn from all parts of the Hong Kong corporate establishment, and include listed-businesses, small and medium enterprises, as well as the largest organisations, who may have a place of business in Hong Kong and operate retirement schemes for their employees.

Corporate Members can nominate both a Primary Representative and an Additional Representative. Corporate Members are entitled to the following rights:

- Receive notices of general meetings of the Association
- Attend and vote at general meetings of the Association
- Participate and/ or stand for election as member of the Association

For more information, please contact the Secretariat:

香港上環香港永樂街 93-103 號協成行上環中心 17 樓 1704 室

Room 1704, 17/F, OfficePlus @Sheung Wan, 93-103 Wing Lok Street, Sheung Wan, Hong Kong

Tel: (852) 2147 0090

Website: www.hkrsa.org.hk

E-mail: info@hkrsa.org.hk

HKRSA Membership Application Form

We wish to apply for the following membership category.

Annual Membership Fee (HK\$):

	Primary	Additional
Corporate Member	<input type="checkbox"/> \$6,300	<input type="checkbox"/> \$1,350
Individual Member	<input type="checkbox"/> \$1,350	

How do you know the HKRSA:

Applicant Details

(For Corporate Membership Applicants only)

Principal Retirement Scheme Name: _____

Value of Assets under Administration (HK\$):

- ORSO _____

- MPF _____

Number of Members in Your Retirement Scheme(s):

- ORSO _____

- MPF _____

Total Number of Employees: _____

Organization Background:

- Bank Consulting / Professional Firm
- Custodian Fund Mgr / Investment Advisor
- Insurance Company Employer Retirement Fund
- Trustee Company Other _____

Occupational Background of Applicant(s):

- Accounting and Finance Actuarial
- Administration Corporate Management
- Human Resources Legal
- Sales and Marketing Other _____

Payment Methods

(Please settle your payment by EITHER of the following methods)

1. Transfer or deposit to our HSBC A/C: 047-391339-001 (A/C Name: The Hong Kong Retirement Schemes Association). Please email (info@hkrsa.org.hk) us a copy of the bank-in slip and this application form for reference purpose.

2. Cheque should be made payable to "The Hong Kong Retirement Schemes Association". Please send your cheque with this application form to: Room 1707, 17/F, OfficePlus @Sheung Wan, 93-103 Wing Lok Street, Sheung Wan, Hong Kong.

Primary Representative Contact Detail

Surname: (Mr/Mrs/Miss/Ms) _____

First Name: _____

Position/Title: _____

Name of Company: _____

Address: _____

Tel: _____ Fax: _____

E-mail: _____

Additional Representative Contact Details*

Surname: (Mr/Mrs/Miss/Ms) _____

First Name: _____

Position/Title: _____

Address: _____

Tel: _____ Fax: _____

E-mail: _____

**If you have more than one additional representative, please make copies of this page and fill in the information as required.*

All personal information collected will be handled in accordance with the Personal Information Collection Statement of HKRSA, a copy of which will be provided with this application form or upon request. For an Individual Member, if you do not wish us to use or transfer your personal data for direct marketing purpose, please tick the box below.

I do not wish the HKRSA to use or transfer my personal data for direct marketing purpose.

Signature: _____

(If applying for Corporate Membership, this should be signed by the Primary Representative)

Company Stamp: _____

(Applicable to Corporate Membership Applicants only)

Date: _____



Hong Kong Retirement Schemes Association (the “HKRSA”)

Personal Information Collection Statement

1. The HKRSA may require you to supply the HKRSA with personal data (as defined in the Personal Data (Privacy) Ordinance, the “**Ordinance**”) in connection with the provision of our services and benefits. Failure to supply such personal data may result in the HKRSA being unable to provide the relevant services or benefits.
2. Personal data collected may be used for one or more of the following purposes:
 - 2.1. to process and administer your application to join the HKRSA;
 - 2.2. to process your request for services or benefits provided by the HKRSA;
 - 2.3. to provide trainings, courses, seminars, conferences, luncheons and other related services or benefits of the HKRSA;
 - 2.4. to process billing, payment and collection of outstanding fees;
 - 2.5. to respond to, handle and process any enquiries submitted by you;
 - 2.6. to design trainings, courses, seminars and other related services of the HKRSA;
 - 2.7. to verify identity in connection with any of the services or benefits that may be supplied to you;
 - 2.8. to disclose to a third party to comply with any law, legal requirements, orders, directions or requests from any court, authority or government body of any jurisdiction, which may be within or outside of Hong Kong;
 - 2.9. to post the list of members on HKRSA's website or other communication materials;
 - 2.10. to promote, direct market services and benefits including seminars, training, courses, trips, functions, events organized by the HKRSA and/or other business associates/organizations jointly or severally and solicitation of donations and contributions for charitable or non-profit making purposes.
3. Personal data held by the HKRSA will be kept confidential but the HKRSA may disclose or transfer such personal data (whether within or outside Hong Kong) for the above purposes to:
 - 3.1. any agent, contractor or third-party service provider who provides administrative, telecommunications, computer, payment, marketing and research, data processing or other services to the HKRSA in connection with its operation or provision of services;
 - 3.2. any person with your express or implied consent;

- 3.3. any other person under a duty of confidentiality to the HKRSA including without limitation, HKRSA's staff and other business associates/organizations which have undertaken to keep such information confidential;
- 3.4. any person or entity to whom the HKRSA is under an obligation to make disclosure under the requirements of any law or rules, regulations, codes of practice or guidelines issued by regulatory or other authorities binding on the HKRSA or with which the HKRSA is expected to comply;
- 3.5. to business associates/organizations for promotional or marketing purposes as set out in Clause 2.9 above.
4. Occasionally, the HKRSA may use the personal data or transfer the personal data to other business associates/organizations for use in direct marketing. The personal data that may be used or transferred includes the name, contact details, use of services information, and demographic data held by the HKRSA (as updated from time to time).
5. Under and in accordance with the terms of the Ordinance and guidelines issued pursuant thereto, any individual may:
 - 5.1. check whether the HKRSA holds data about him/her and may request access to such data;
 - 5.2. request the HKRSA to correct any data relating to him/her which is inaccurate;
 - 5.3. request the HKRSA to specify its policies and practices in relation to personal data and to be informed of the kind of personal data held by the HKRSA.
6. In accordance with the terms of the Ordinance, the HKRSA has the right to charge a reasonable fee for the processing of any data access or correction request.
7. If you wish to exercise any of your rights specified in Clause 5 above, please address your request in writing to our Data Protection Officer at Room 1704, 17/F, OfficePlus@Sheung Wan, 93-103 Wing Lok Street, Sheung Wan, Hong Kong.
8. If you are at any time requested to supply personal data about your staff or a third party, you are requested to pass a copy of this Statement to the relevant staff or third party so that he/she is aware of his/her rights under the Ordinance.
9. The HKRSA will keep the personal data for as long as necessary to fulfill the purposes for which the personal data was collected. Personal Data which is no longer required will be destroyed.
10. The HKRSA reserves the right to make amendments to this Statement. If at any point the HKRSA decides to use personal data in a manner different from that stated at the time it was collected, the HKRSA will notify you prior to implementing the change and your express consent will be needed before the HKRSA uses your personal data in this different manner.