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**Individual Tax Residency Self-Certification Form (CRS)**  
**個人稅務居民身份自我證明表格 《共同匯報標準》**  
**(Applicable to New Business Application Supplement)**  
**(適用於新保單申請附加資料)**

**Important Notes 重要事項：**

- Tax law and regulations (including but not limited to the Inland Revenue Ordinance (Cap.112) and regulations based on the Organisation for Economic Co-operation and Development (OECD) Common Reporting Standard (CRS) for automatic exchange of information) require Manulife to collect and report information about tax residence. In certain circumstances, Manulife may be obliged to provide certain information to governments, regulators and tax authorities concerning your tax residency and other data.

稅務法律及規例（包括但不限於《稅務條例》（第112章）和根據自動交換資料有關的經濟合作與發展組織（OECD）《共同匯報標準》（CRS）的規則）要求宏利收集及申報關於稅務居民的資料。在部份情況下，宏利可能有義務向政府、監管機構或稅務當局提供有關閣下稅務居民及相關資料。

- This is a self-certification provided by you to Manulife for the purpose of automatic exchange of financial account information. The data collected may be transmitted by Manulife to the Inland Revenue Department which may further exchange such information to the competent authority of another reportable jurisdiction.

這是由閣下向宏利提供的自我證明，以作自動交換財務帳戶資料用途。宏利可把收集所得的資料交給稅務局，稅務局會將資料交到另一司法管轄區的主管當局。

- As a financial institution, Manulife is not allowed to give tax or legal advice. If you have any questions regarding your tax residency, please consult your tax adviser or the information for CRS at the following links at <http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/> and [http://www.ird.gov.hk/eng/tax/dta\\_aeoi.htm](http://www.ird.gov.hk/eng/tax/dta_aeoi.htm) respectively.

宏利不獲允許提供稅務或法律意見。若閣下對您的稅務居民狀態存有任何疑問，請詢問專業稅務顧問或瀏覽 <http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance> 及 [http://www.ird.gov.hk/eng/tax/dta\\_aeoi.htm](http://www.ird.gov.hk/eng/tax/dta_aeoi.htm) 網站關於CRS資料。

- If this is a joint owners' application, each of you must complete a separate Individual Tax Residency Self-Certification Form (CRS).

若為聯名申請書，每位申請人都需要填妥一份個人稅務居民身份自我證明表格《共同匯報標準》。

- If a valid CRS self-certification or a reasonable explanation and documentation (as appropriate) supporting the reasonableness of the CRS self-certification is not provided, it may delay the issuance of the policy.

假如閣下未能提供有效的CRS自我證明或合理解釋和證明文件（如適用）以支持CRS自我證明的合理性，這有可能延誤閣下保單賬戶的設立。

- This self-certification will remain valid unless there is any change in circumstances relating to your status of tax residency(ies). You must notify Manulife within 30 days if there is any change in circumstances that makes any of the information provided in any parts of this self-certification form incorrect or incomplete and provide an updated self-certification form.

這自我證明是有效文件除非您的稅務居住地相關的情況有所改變。如情況有所改變，以致影響本自我證明所述的個人的稅務居民身份，或引致本表格任何部分所載的資料不正確，您必須在情況有所改變後的30天內通知宏利有關的改變並提供最新的自我證明。

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Please complete in BLOCK letters 請以正楷填寫此表格

### 1. Personal Information 個人資料

Name of Policyowner

保單持有人姓名

Surname 姓

Given Name & Middle Name(s) 名

Date of Birth

出生日期

DD/MM/YYYY (日/月/年)

Place of Birth

出生地方

Hong Kong 香港

Macau 澳門

Other 其他

City 城市

Country 國家

Current Residential Address

現時住宅地址

Room / Flat 室 / Floor 樓 / Block 座

Name of Estate / Village / Building 屋村 / 大廈名稱

Number and Name of Street/Road 街道名稱及號碼

Name of Area 區域 / District 地區 / Postal Code 郵寄代碼

City 城市

Country 國家

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## 2. Tax Status 稅務狀況

Please list all jurisdictions (including Hong Kong) where you are a resident for tax purposes and Taxpayer Identification Number or its Functional Equivalent (TIN) for each jurisdiction. If more than 3 jurisdictions, use a separate sheet. If you are a tax resident of Hong Kong, the TIN is the Hong Kong Identity Card Number. For more guidance on TIN, please visit the OECD website at: <http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/>  
 請列明閣下在當地為符合稅務目的之居民的所有司法管轄區（包括香港）以及該司法管轄區發出的稅務編號或具有等同功能的識辨編號（稅務編號）。如多於3個司法管轄區，使用另外紙張。如閣下是香港稅務居民，稅務編號是香港身份證號碼。如欲了解相關稅務居民司法管轄區發佈的稅務編號，您可瀏覽OECD網頁：<http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/>

Jurisdiction of Tax Residency 稅務居民所在司法管轄區	Taxpayer Identification Number or its Functional Equivalent (TIN) 稅務編號或具有等同功能的識辨編號	If no TIN is available, enter Reason A, B or C 若無稅務編號，填上理由A、B或C
1		
2		
3		

Reason A: The jurisdiction where the account holder is a resident for tax purposes does not issue TINs to its residents.  
 理由 A - 帳戶持有人在當地為稅務居民的司法管轄區不向其居民發出稅務編號。  
 Reason B: The account holder is unable to obtain a TIN. (Please explain why you are unable to obtain TIN in the below table if you have selected this reason.)  
 理由 B - 帳戶持有人無法獲得稅務編號。（若您選擇這理由，請在下表解釋閣下無法獲得稅務編號的原因。）  
 Reason C: No TIN is required. (Note: Only select this reason if the authority of the relevant jurisdiction of residence does not require the TIN to be disclosed.)  
 理由 C - 無需稅務編號。（註：只有在相關司法管轄區的主管當局不需要披露該司法管轄區發出的稅務編號方可選擇這理由。）

Please explain in the following box why you are unable to obtain a TIN if you selected Reason B above.  
 若您選擇上方理由B，請在以下方框內解釋無法獲得稅務編號的原因。

1	
2	
3	

**Remarks 備註：**

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### 3. Explanation on my tax residency (if applicable) 我的稅務居民解釋 (如適用)

I am not a tax resident of \_\_\_\_\_ because of the following reason(s) and the relevant documentary evidence, if any, is enclosed

由於以下原因，我不是\_\_\_\_\_的稅務居民，並且提供書面證明（如有需要）：

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### 4. Declaration and Acknowledgement 聲明及確認

I declare that the information given and all statements made in this self-certification (which includes any separate sheet(s)) are, to the best of my knowledge and belief, true, correct and complete.

本人聲明就本人所知所信，本自我證明（包括使用另外紙張）內所填報的所有資料和聲明均屬是真實、正確及完備。

I understand that the information supplied by me is covered by the full provisions of the terms and conditions governing the account holder's relationship with Manulife setting out how Manulife may use and share the information supplied by me.

本人明白，本人提供之資料受管限帳戶持有人與宏利之間關係的全部條款及條件規定所限，該等規定列明了宏利可如何使用及分享本人提供之資料。

I undertake to advise Manulife of any change in circumstances which affects the tax residency status of the individual identified in this self-certification or causes the information contained herein to become incorrect or incomplete, and to provide Manulife with a suitably updated self-certification within 30 days of such change in circumstances.

本人承諾，如情況有所改變，以致影響本自我證明所述的個人的稅務居民身份，或引致本自我證明所載的資料不正確或不完整，本人會通知宏利，並會在情況發生改變後30天內，向宏利提交一份適當更新的自我證明。

I acknowledge and agree that (a) the information contained in this self-certification is collected and may be kept by Manulife for the purpose of automatic exchange of financial information and (b) such information and information regarding the account holder and any reportable account(s) may be reported by Manulife to the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region and exchanged with the competent authorities of a reportable jurisdiction(s) in which the account holder may be resident for tax purposes, pursuant to the legal provisions for exchange of financial account information provided under the Inland Revenue Ordinance (Cap.112) and (c) I agree to the obligation that the account holder must comply with requests made by Manulife to comply with the CRS (AEOI) requirements under the Inland Revenue Ordinance and/or applicable law and regulation, and such obligation forms the basis of the policy to be issued.

本人確認及同意，宏利可根據《稅務條例》（第112章）有關交換財務帳戶資料的法律條文，(a)收集本自我證明所載資料並可備存作自動交換財務帳戶資料用途及(b)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特別行政區政府稅務局申報，從而把資料轉交到帳戶持有人的稅務司法管轄區的主管當局及(c)本人同意帳戶持有人必須遵守宏利的要求以便遵守《稅務條例》及/或適用法律及規例的CRS（AEOI）規定，並為日後簽發保單之基礎。

I confirm that I have received and read the Notice to Customers relating to the Personal Data (Privacy) Ordinance (version 20130401-01) ("Notice"). I understand and agree to the Notice.

本人已收訖及閱畢《有關〈個人資料（私隱）條例〉的客戶通知（20130401-01版本）》（「通知」）。本人同意及確認該通知。

I certify that I am the account holder of all the account(s) to which this form relates.

本人證明，就與本表格所有相關的帳戶，本人是帳戶持有人。

Signature of Policyowner :

保單持有人簽署 \_\_\_\_\_

Date (DD/MM/YYYY) :

日期（日/月/年） \_\_\_\_\_

**WARNING:** It is an offence under section 80(2E) of the Inland Revenue Ordinance if any person, in making a self-certification, makes a statement that is misleading, false or incorrect in a material particular AND knows, or is reckless as to whether, the statement is misleading, false or incorrect in a material particular. A person who commits the offence is liable on conviction to a fine at level 3 (i.e. HK\$10,000).

**警告：**根據《稅務條例》第 80 (2E) 條，如任何人在作出自我證明時，在明知一項陳述在要項上屬具誤導性、虛假或不正確，或罔顧一項陳述是否在要項上屬具誤導性、虛假或不正確下，作出該項陳述，即屬犯罪。一經定罪，可處第 3 級（即HK\$10,000）罰款。