

**Disclaimer:** This quick reference guide is prepared by Manulife as a general guide for common scenarios only. It should not be regarded as tax advice or complete instructions. If you have doubts about how to fill in the form properly and all other matters related to CRS and FATCA, you are recommended to consult independent professional/tax advisor.

**免責聲明:** 這表格指南是由宏利提供作為普通情況的一般指南參考。閣下不應視此為稅務意見或填寫指示。如有相關填寫表格或通用報告準則和海外帳戶稅收合規法案疑問，請向專業稅務及法律顧問諮詢。

Please fill in your Policy No.  
請填寫您的保單編碼

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Policy No. 保單編碼 : 

0	1	—	2	3	4	5	6	7	8	—	9
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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 Account Holder 帳戶持有人姓名: CHAN TAI MAN

Surname 姓 Given Name & Middle Name(s) 名

Date of Birth 出生日期: 26/01/1986

DD/MM/YYYY (日/月/年)

Place of Birth 出生地點:  Hong Kong 香港  Macau 澳門

Other 其他: SHANGHAI CHINA

City 城市 Country 國家

Residential Address 住宅地址: FLAT A, 38TH FLOOR, BLOCK 10

Room / Flat 室 / Floor 樓 / Block 座

HAPPY GARDEN

Name of Estate / Village / Building 屋村 / 大廈名稱: 8 HAPPINESS STREET

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

Name of Area 區域 / District 地區 / Postal Code 郵寄代碼: HONG KONG HONG KONG, CHINA

City 城市 Country 國家

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**2. Tax Status 稅務狀況**

**A. Declaration of U.S. Tax Status 美國稅務身份聲明**

Are you a citizen, resident or permanent resident alien of the United States of America (Permanent Resident / Green Card Holder / US Citizen)? 您是否美國公民、美國居民或擁有美國居民身份之外僑 (永久居民 / 綠卡持有人 / 美國公民)?

Yes 是 (Please provide your consent to report along with U.S. TIN, by submitting the prescribed form / substitute Form W-9 as requested by Manulife and complete your U.S. jurisdiction of tax residency and TIN in paragraph number 2B. 請提交宏利所要求的指定表格於第2B項填寫有關美國稅務局下的美國稅務識別號碼並

No 否

If the "Name" entered is different from Manulife records, we may seek further clarifications from you. 如提供的姓名與本公司紀錄不符，須再與您聯絡。

Must complete. 必須填寫。

Please provide full address without abbreviation. 請提供沒有縮寫的完整地址。

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Signature of Account Holder: Chan Tai Man  
帳戶持有人簽署

Must provide the same signature as on Manulife record. 簽署必須與本公司紀錄相同。

Date (DD/MM/YYYY) : 15/03/2018  
日期 (日/月/年)

Must submit within 2 months from sign date. 請於簽署日期兩個月內提交表格。

**Example (1) 範例 (1) For Hong Kong tax residency, complete (i), (ii) (1) and (iii) 香港稅務居民，請完成 (i)，(ii) (1) 及 (iii)**

**Applicant's Tax Residence** 申請人稅務居住他  
I hereby declare that, to the best of my knowledge and belief :  
以本人據知及所信，在此聲明：

(i) If you have any foreign indicia in countries / jurisdictions where you are not a resident for tax purposes, please list out the indicia (e.g. nationality, place of birth, residential address, correspondence / office address, contact number, etc) and its related country / jurisdiction and provide an explanation for not being a tax resident in that country / jurisdiction. 如您擁有外籍標記，但不符合該國家/司法管轄區的稅務居民身份，請在下方框內列出該標記(例如：國籍、出生地點、住宅/通訊/辦公地址、聯繫電話等)及其國家/司法管轄區並解釋不符合的原因。

<Example for illustration only 範例只作說明用途>

Telephone number was in 曾用作電話號碼: [\*\*Country 國家\*\*] - [\*\*Explanation 解釋原因\*\*]

(1) I am a tax resident of Hong Kong only 本人只是香港的稅務居民

(2) I am a tax resident of Hong Kong and also some other jurisdictions or countries 本人是香港及其他司法管轄區或國家的稅務居民

(3) I am not a tax resident of Hong Kong, but instead a tax resident of some other jurisdictions or countries. 本人不是香港的稅務居民，而是其他司法管轄區或國家的稅務居民

(ii) If a "✓" is put in tick box (1), (2) or (3) above, please provide the following information of each country/jurisdiction of the tax residence 如上述選擇為 1、2 或 3，請根據各個稅務居住地填寫以下資料。

Country / Jurisdiction of Tax Residency 稅務居民所在國家 / 司法管轄區	TIN 稅務編號	If no TIN is available, enter Reason A, B or C 若未能提供稅務編號，填上理由A、B或C	Please explain why you are unable to obtain a TIN if you selected Reason B. 若您選擇理由B，請在下方解釋無法取得稅務編號的原因。
1 HONG KONG 香港	A123456(B)		
2			

**Example (2) 範例 (2): For Hong Kong tax residency and also some other jurisdictions/countries, complete (i), (ii) (2) and (iii) 香港稅務居民及其他司法管轄區或國家請完成 (i)，(ii) (2) 及 (iii)**

**Applicant's Tax Residence** 申請人稅務居住他  
I hereby declare that, to the best of my knowledge and belief :  
以本人據知及所信，在此聲明：

(i) If you have any foreign indicia in countries / jurisdictions where you are not a resident for tax purposes, please list out the indicia (e.g. nationality, place of birth, residential address, correspondence / office address, contact number, etc) and its related country / jurisdiction and provide an explanation for not being a tax resident in that country / jurisdiction. 如您擁有外籍標記，但不符合該國家/司法管轄區的稅務居民身份，請在下方框內列出該標記(例如：國籍、出生地點、住宅/通訊/辦公地址、聯繫電話等)及其國家/司法管轄區並解釋不符合的原因。

<Example for illustration only 範例只作說明用途>

Correspondence address was in 曾用作通訊地址[\*\*Country 國家\*\*]: [\*\*Explanation 解釋原因\*\*]

(1) I am a tax resident of Hong Kong only 本人只是香港的稅務居民

(2) I am a tax resident of Hong Kong and also some other jurisdictions or countries 本人是香港及其他司法管轄區或國家的稅務居民

(3) I am not a tax resident of Hong Kong, but instead a tax resident of some other jurisdictions or countries. 本人不是香港的稅務居民，而是其他司法管轄區或國家的稅務居民

(iii) If a "✓" is put in tick box (1), (2) or (3) above, please provide the following information of each country/jurisdiction of the tax residence 如上述選擇為 1、2 或 3，請根據各個稅務居住地填寫以下資料。

Country / Jurisdiction of Tax Residency 稅務居民所在國家 / 司法管轄區	TIN 稅務編號	If no TIN is available, enter Reason A, B or C 若未能提供稅務編號，填上理由A、B或C	Please explain why you are unable to obtain a TIN if you selected Reason B. 若您選擇理由B，請在下方解釋無法取得稅務編號的原因。
1 HONG KONG 香港	A123456(B)		
2 CANADA 加拿大	123 456 789		

Must provide explanation if you have any foreign indicia in countries/jurisdictions where you are NOT a tax resident. 如您有外籍標記但不符合該國家/司法管轄區的稅務居民身份，必須作出解釋。

**Example (3) 範例 (3): Tax residency in other jurisdictions/countries, complete (i), (ii) (3) and (iii) 其他司法管轄區或國家請完成 (i)，(ii) (3) 及 (iii)**

**Applicant's Tax Residence** 申請人稅務居住他  
I hereby declare that, to the best of my knowledge and belief :  
以本人據知及所信，在此聲明：

(i) If you have any foreign indicia in countries / jurisdictions where you are not a resident for tax purposes, please list out the indicia (e.g. nationality, place of birth, residential address, correspondence / office address, contact number, etc) and its related country / jurisdiction and provide an explanation for not being a tax resident in that country / jurisdiction. 如您擁有外籍標記，但不符合該國家/司法管轄區的稅務居民身份，請在下方框內列出該標記(例如：國籍、出生地點、住宅/通訊/辦公地址、聯繫電話等)及其國家/司法管轄區並解釋不符合的原因。

<Example for illustration only 範例只作說明用途>

Previously resided in 曾居住在[\*\*Country 國家\*\*] - [\*\*Explanation 解釋原因\*\*]  
Holder of ID card 持有身份證: [\*\*Country 國家\*\*] - [\*\*Explanation 解釋原因\*\*]

(1) I am a tax resident of Hong Kong only 本人只是香港的稅務居民

(2) I am a tax resident of Hong Kong and also some other jurisdictions or countries 本人是香港及其他司法管轄區或國家的稅務居民

(3) I am not a tax resident of Hong Kong, but instead a tax resident of some other jurisdictions or countries. 本人不是香港的稅務居民，而是其他司法管轄區或國家的稅務居民

(iii) If a "✓" is put in tick box (1), (2) or (3) above, please provide the following information of each country/jurisdiction of the tax residence 如上述選擇為 1、2 或 3，請根據各個稅務居住地填寫以下資料。

Country / Jurisdiction of Tax Residency 稅務居民所在國家 / 司法管轄區	TIN 稅務編號	If no TIN is available, enter Reason A, B or C 若未能提供稅務編號，填上理由A、B或C	Please explain why you are unable to obtain a TIN if you selected Reason B. 若您選擇理由B，請在下方解釋無法取得稅務編號的原因。
1 CANADA 加拿大	123 456 789		
2 JAPAN 日本		B	[**Explanation 解釋原因**]

If 'Reason B' is selected for no TIN reason, please provide "Explanation" in the box. 如選擇理由B，請在框中提供“解釋原因”。