

**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.  
請填寫您的保單編號

Page 1 第 1 頁

Policy No. 保單編號 :

0	1	—	2	3	4	5	6	7	8	—	9
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Page 2 第 2 頁

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
Place of Birth 出生地點	<input type="checkbox"/> Hong Kong 香港 <input type="checkbox"/> Macau 澳門
Residential Address 住宅地址	FLAT A, 38TH FLOOR, BLOCK 10 HAPPY GARDEN 8 HAPPINESS STREET KWUN TONG HONG KONG, CHINA

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。

Must select the applicable box.  
必須選擇適當選項。

Page 4 第 4 頁

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**

Applicant's Tax Residence 申請人稅務居住地  
I hereby declare that, to the best of my knowledge and belief, I am (please tick on 以本人據知及所信，在此聲明本人 (請選一項)：

(i) a tax resident of Hong Kong **only** 只是香港的稅務居民

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

(iii) **not a** tax resident of Hong Kong, but instead a tax resident of some other jurisdictions or countries 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

If you have any foreign indicia (e.g. nationality, place of birth, residential address / correspondence / office address, contact number, etc), please provide your explanation for not being a tax resident of the country / jurisdiction. 如果您有任何外籍標記 (例如：國籍、出生地點、住宅／通訊／辦公地址、聯繫電話等)，請在以下方框內解釋不屬於此國家／司法管轄區的稅務居民之原因。

<Example for illustration only 範例只作說明用途>  
Nationality 國籍: [\*\*Country 國家\*\*] - [\*\*Explanation 解釋原因\*\*]

If a "✓" is put in tick box (ii) or (iii) above, please provide the following information of each country/jurisdiction of the tax residence. 如上述選擇為 (ii) 或 (iii)，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 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			
2			

**Example (2) 範例 (2): For Hong Kong tax residency and also some other jurisdictions/countries**

Applicant's Tax Residence 申請人稅務居住地  
I hereby declare that, to the best of my knowledge and belief, I am (please tick on 以本人據知及所信，在此聲明本人 (請選一項)：

(i) a tax resident of Hong Kong **only** 只是香港的稅務居民

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

(iii) **not a** tax resident of Hong Kong, but instead a tax resident of some other jurisdictions or countries 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

If you have any foreign indicia (e.g. nationality, place of birth, residential address / correspondence / office address, contact number, etc), please provide your explanation for not being a tax resident of the country / jurisdiction. 如果您有任何外籍標記 (例如：國籍、出生地點、住宅／通訊／辦公地址、聯繫電話等)，請在以下方框內解釋不屬於此國家／司法管轄區的稅務居民之原因。

<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\*\*]

If a "✓" is put in tick box (ii) or (iii) above, please provide the following information of each country/jurisdiction of the tax residence. 如上述選擇為 (ii) 或 (iii)，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 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**

Applicant's Tax Residence 申請人稅務居住地  
I hereby declare that, to the best of my knowledge and belief, I am (please tick on 以本人據知及所信，在此聲明本人 (請選一項)：

(i) a tax resident of Hong Kong **only** 只是香港的稅務居民

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

(iii) **not a** tax resident of Hong Kong, but instead a tax resident of some other jurisdictions or countries 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

If you have any foreign indicia (e.g. nationality, place of birth, residential address / correspondence / office address, contact number, etc), please provide your explanation for not being a tax resident of the country / jurisdiction. 如果您有任何外籍標記 (例如：國籍、出生地點、住宅／通訊／辦公地址、聯繫電話等)，請在以下方框內解釋不屬於此國家／司法管轄區的稅務居民之原因。

<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\*\*]

If a "✓" is put in tick box (ii) or (iii) above, please provide the following information of each country/jurisdiction of the tax residence. 如上述選擇為 (ii) 或 (iii)，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 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”。