




**Supplementary Form for Common Reporting Standard**  
共同匯報標準附加表格

Policy Number 保單號碼	Name of Applicant / Owner 申請人 / 持有人姓名	ID Card Number / Passport Number 身份證號碼 / 護照號碼	 P5092013
Area Code 區域編號	Agency / Broker Name 營業員組別 / 經紀名稱	Agent / Broker Code 營業員號碼 / 經紀號碼	
Operation 營運部  VIP <input type="checkbox"/>	Agent / Broker's Name 營業員 / 經紀姓名	Agent / Broker's Tel. No 營業員 / 經紀聯絡電話	
TR Membership Number 業務代表會員號碼 <input type="checkbox"/> IA <input type="checkbox"/> ANG			
<p><i>TIPS: Check the checkbox (IA for HK; ANG for Macau) and input the reg. no. using standard format [for HK, it is 2 letters + 4 digits; for Macau, it is 3 letters + 4 digits]</i>          提示：選取方格 (IA-香港；ANG-澳門) 並填入特定的登記號碼 [香港號碼由2個英文字母 + 4位數字組成；澳門號碼由3個英文字母 + 4位數字組成]</p> <p>Remark: If the stated AIA financial planner / broker / IFA on this form is not my current servicing AIA financial planner / broker / IFA, I give consent to him/her to handle and follow up my request.          備註：倘若在上述表格上填寫的財務策劃顧問 / 經紀 / 獨立理財顧問並不是本人目前的財務策劃顧問 / 經紀 / 獨立理財顧問，本人同意他/她處理並跟進我的要求。</p>			

For individual applicant / owner that declared to be the tax resident of OECD (Organisation for Economic Co-operation and Development) designated Residence / Citizenship by Investment schemes country(ies), please complete the form as below. Please refer to OECD website for details: <https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/residence-citizenship-by-investment/>

本表格適用於個人申請人 / 持有人聲明為經濟合作與發展組織（經合組織）所指的RBI / CBI投資移民計劃之國家之稅務居民，請填妥以下部份。詳情請參閱經合組織網頁：<https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/residence-citizenship-by-investment/>

I \_\_\_\_\_ (applicant / owner) hereby supplement to my Self-Certification Form – Individual dated \_\_\_\_\_ as follows:  
(MM/DD/YYYY)

本人 \_\_\_\_\_ (申請人 / 持有人) 現特此補充於 \_\_\_\_\_ 簽署的自我證明表格一個人，有關資料如下：  
(月/日/年)

	YES 是	NO 否
1. Did you obtain the residence right of your declared jurisdiction(s) / country(ies) via a Citizenship by Investment / Residence by Investment Scheme (please refer to above OECD website for OECD Residence / Citizenship by Investment Schemes countries)? If "Yes", please complete Questions 2(a) and 2(b). If "No", please proceed to page 3, sign and return. 您是否以投資移民計劃獲得您聲明的司法管轄區/國家的居住權（經合組織RBI / CBI投資計劃國家請參閱以上之經合組織網站）？如是，請完成問題2(a)及2(b)。如否，請於第3頁簽署確認。	<input type="checkbox"/>	<input type="checkbox"/>
2. a) Do you hold residence right of any jurisdiction(s) / country(ies) other than the above country? 除以上國家外，您有否擁有其他司法管轄區/國家的居住權？ b) Have you filed personal income tax return(s) during the previous year to jurisdiction(s) / country(ies) other than the above country? 於上一年度，您有否於以上國家以外的司法管轄區 / 國家申報個人所得稅？  If either above 2(a) and / or 2(b) is "Yes", please complete 2(c). 如上述2(a)及 / 或2(b) "是"，請完成2(c)。	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
c) Are you tax resident of jurisdiction(s) / country(ies) concerned in above 2(a) and / or 2(b)? 您是否以上2(a)及 / 或2(b)提及的司法管轄區 / 國家之稅務居民？	<input type="checkbox"/>	<input type="checkbox"/>

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If answer of 2(c) is "Yes", please state out the name of the concerned jurisdiction(s) / country(ies) in below.

如2(c)的答案為“是”，請於以下列出2(a)及/或2(b)的地區/國家名稱。

Jurisdiction of Residence 居留司法管轄區	Tax Identification Number (TIN) 稅務編號	Enter Reason A, B or C if no TIN is available 如沒有提供稅務編號， 填寫理由A、B或C	Explain why the account holder is unable to obtain a TIN if you have selected Reason B 如選擇理由B，解釋帳戶持有人 不能取得稅務編號的原因
1			
2			
3			

If a TIN is unavailable, provide the appropriate reason A, B or C:

如沒有提供稅務編號，必須填寫合適的理由：

Reason A – The jurisdiction where the account holder is a resident for tax purposes does not issue TINs to its residents.

理由A – 帳戶持有人的居留司法管轄區並沒有向其居民發出稅務編號。

Reason B – The account holder is unable to obtain a TIN. Explain why the account holder is unable to obtain a TIN if you have selected this reason.

理由B – 帳戶持有人不能取得稅務編號。如選取這一理由，解釋帳戶持有人不能取得稅務編號的原因。

Reason C – TIN is not required. Select this reason only if the authorities of the jurisdiction of residence do not require the TIN to be disclosed.

理由C – 帳戶持有人毋須提供稅務編號。居留司法管轄區的主管機關不需要帳戶持有人披露稅務編號。

If answer of 2(c) is "No", please state out the name of the concerned jurisdiction(s) / country(ies) and provide reason of not being the tax resident.

如2(c) 的答案為“否”，請列出2(a)及/或2(b)的司法管轄區/國家，及說明不是該司法管轄區/國家稅務居民之原因。

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#### DECLARATIONS AND SIGNATURE

I acknowledge and irrevocably agree that the information contained in this form and information regarding the Applicant / Account Holder and any Reportable Account(s)\* may be provided to the tax authorities of the country / jurisdiction in which this account(s) is / are maintained and exchanged with tax authorities of another country / jurisdiction or countries / jurisdictions in which the Applicant / Account Holder may be tax resident pursuant to intergovernmental agreements to exchange financial account information.

\*"Reportable Account" has the meanings ascribed to it under the "Common Standard on Reporting and Due Diligence for Financial Account Information" promulgated by the Organisation for Economic Cooperation and Development.

- I certify that I am the applicant / account holder (or am authorized to sign for the applicant / account holder)# of all the account(s) to which this form relates.
- I declare that all statements made in this declaration are, to the best of my knowledge and belief, correct and complete.
- I undertake to advise the Company within 30 days of any change in circumstances which affects the tax residency status of the party / parties identified as Applicant / Account Holder of this form or causes the information contained herein to become incorrect or incomplete, and to provide the Company with a suitably updated self-certification and Declaration within 30 days of such change in circumstances.
- I agree to indemnify the Company against any loss, claim and action in connection with any false, misleading or incomplete information of my nationality, residence and / or tax status.

#### 聲明及簽署

本人知悉並完全同意這表格內，所有資料及有關申請人 / 帳戶持有人的個人資料，和任何須申報帳戶\*，將有可能提供予管理該帳戶的國家 / 司法管轄區之稅務機關，及轉交予其他國家 / 司法管轄區之稅務機關或申請人 / 帳戶持有人所屬之國家 / 司法管轄區為根據跨政府協議所訂之財務帳戶資料交換要求的國家 / 司法管轄區。

\*“須申報帳戶”之定義請參考經濟合作與發展組織頒佈的“共同申報準則及財務帳戶資料之盡職調查”

- 本人在此聲明，本人是本申請書相關之全部帳戶的申請人 / 帳戶持有人（或獲申請人 / 帳戶持有人授權簽署）#。
- 本人聲明一切在這份聲明之條款是基於本人的據知及所信，並且是正確及完整的。
- 本人承諾，如有任何改動會影響認定為申請人 / 帳戶持有人之一方 / 多方之稅務居民狀況內容，或導致其所載資料失實或不完整，本人將於有關改動發生後30日內通知貴公司，並在該變動發生後30日內，向貴公司提交最新的自我證明書。
- 本人同意賠償貴公司就本人的國籍、居住及 / 或稅務狀況有關資料之虛報、誤導或不完整所導致的任何損失，索償及訴訟。

# Delete as appropriate 刪去不適用者

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**PERSONAL DATA COLLECTION AND USE**

I / We confirm that I / We have read and understood the AIA Everest Life Company Limited's (AIA Everest) Personal Information Collection Statement (the Statement).

I / We declare and agree that any personal data and other information relating to me / us or my / our policy(ies) or investments contained in this application or collected, obtained, compiled or held by AIA Everest by any means from time to time may be collected and utilized in accordance with the Statement. I / We acknowledge and consent to the transfer of my / our personal data to parties within or outside Hong Kong for the purposes as set out in the Statement. The updated version of the Statement which complies with the relevant rules and regulations is available for download from its website: <https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAE-PICS-English.pdf>, and is also available upon request.

**個人資料收集及使用**

本人 / 我們確認本人 / 我們已閱讀及明白友邦雋峰人壽有限公司（友邦雋峰）個人資料收集聲明（「該聲明」）。

本人 / 我們聲明及同意在本申請所載或友邦雋峰不時以任何方法收集所得、編製或持有的任何個人資料及關於本人 / 我們的保單或投資的其他資料，可根據該聲明收集及使用。

本人 / 我們知悉及同意就該聲明所述目的轉讓本人 / 我們的個人資料至香港境內或境外各方。

該聲明符合相關守則及法例的最新版本可於以下網址下載：

<https://www.aia.com.hk/content/dam/hk-wise/pdf/privacy-statement/AIAE-PICS-Traditional-Chinese.pdf>，及可向貴公司索取。

Date 日期：（MM月 / DD日 / YYYY年）

(Please do not sign on blank form 請勿在空白表格上簽署)  
Signature of the Applicant / Owner  
申請人 / 持有人簽署

“AIA” herein refers to AIA Everest Life Company Limited (Incorporated in Hong Kong with limited liability).  
“AIA” 指友邦雋峰人壽有限公司（於香港註冊成立之有限公司）。