

自我證明表格 (個人)
Self-Certification Form (Individual)

請以正楷填寫。Please complete in BLOCK LETTERS

保單編號 Policy No.

請在填寫此表格前參閱下列指引。

PLEASE READ THE FOLLOWING INSTRUCTIONS BEFORE COMPLETING THE FORM.

重要提示

這是由帳戶持有人向 Blue Insurance Limited ("Blue") 提供的自我證明表格，並根據《稅務條例》(第 112 章) 作自動交換財務帳戶資料用途。Blue 可把收集所得的資料交給香港稅務局(「稅務局」)，稅務局會將資料轉交到另一稅務管轄區的稅務當局。

如帳戶持有人的稅務居民身分有所改變，應立即將所有變更通知 Blue。

除不適用或特別註明外，必須填寫這份表格所有部分。如這份表格上的空位不夠應用，可另紙填寫。在欄 / 部標有星號 (*) 的項目為 Blue 須向稅務局申報的資料。

Important Notes

This is a self-certification form provided by an account holder to Blue Insurance Limited (referred to throughout as "Blue") for the purpose of complying with the automatic exchange of financial account information under the Inland Revenue Ordinance (Cap. 112). The data collected may be transmitted by Blue to the Inland Revenue Department of Hong Kong for transfer to the tax authority of another jurisdiction.

An account holder should immediately report all changes in his/her tax residency to Blue.

All parts of the form must be completed (unless not applicable or otherwise specified). If space provided is insufficient, continue on additional sheet(s). Information in fields/parts marked with an asterisk (*) are required to be reported by the reporting financial institution (i.e. Blue) to the Inland Revenue Department.

第 1 部分：個人帳戶持有人的身份識別資料 (對於聯名帳戶或多人聯名帳戶，每名個人帳戶持有人須分別填寫一份表格)

Part 1 : Identification of Individual Account Holder (For joint or multiple account holders, complete a separate form for each individual account holder)

(A) 帳戶持有人姓名 Name of Account Holder:

姓氏* Family Name/Surname(s) * : _____ 稱謂 Title : _____
名字* First or Given Name * : _____ 中間名 Middle Name(s) : _____

(B) 香港身份證或護照號碼 Hong Kong Identity Card or Passport Number: _____

(C) 現時住址 Current Residence Address:

第 1 行 (例如：室、樓層、大廈、街道、地區)
Line 1 (e.g. Suite, Floor, Building, Street, District) : _____
第 2 行 (城市) *
Line 2 (City) * : _____
第 3 行 (例如：省、州)
Line 3 (e.g. Province, State) : _____
國家 *
Country * : _____
郵政編碼 / 郵遞區號碼 (如適用)
Postal Code / ZIP Code (if any) : _____

(D) 通訊地址 Mailing Address: (如通訊地址與現時住址不同，請填妥此部份 Please complete only if different to the current residence address)

第 1 行 (例如：室、樓層、大廈、街道、地區)
Line 1 (e.g. Suite, Floor, Building, Street, District) : _____
第 2 行 (城市)
Line 2 (City) : _____
第 3 行 (例如：省、州)
Line 3 (e.g. Province, State) : _____
國家
Country : _____
郵遞 / 郵區編號 (如適用)
Postal Code / ZIP Code (if any) : _____

(E) 出生日期 Date of Birth * : _____ (日 / 月 / 年) (DD/MM/YYYY)

(F) 出生地 Place of Birth:

城鎮 / 城市
Town/ City : _____
省 / 州
Province/ State : _____
國家
Country : _____

第 2 部分：居留司法管轄區及稅務編號或具有等同功能的識辨編號 (以下簡稱「稅務編號」) *

Part 2: Jurisdiction of Residence and Taxpayer Identification Number or its Functional Equivalent ("TIN") *

提供以下資料，列明 (a) 帳戶持有人的居留司法管轄區，亦即帳戶持有人的稅務管轄區 (香港包括在內) 及 (b) 該居留司法管轄區發給帳戶持有人的稅務編號。列出所有 (不限於 5 個) 居留司法管轄區。

如帳戶持有人是香港稅務居民，稅務編號是其香港身份證號碼。

如沒有提供稅務編號，必須填寫合適的理由：

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。

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。

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控權人披露稅務編號。

Complete the following table indicating (a) the jurisdiction of residence (including Hong Kong) where the account holder is a **resident for tax purposes** and (b) the account holder's TIN for each jurisdiction indicated. Indicate all (not restricted to five) the jurisdictions of residence.

If the account holder is a tax resident of Hong Kong, the TIN is the Hong Kong Identity Card Number.

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

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

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.

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.

居留司法管轄區 Jurisdiction of Residence	稅務編號 TIN	如沒有提供稅務編號，填寫理由 A、B 或 C Enter Reason A, B or C if no TIN available	如選取理由 B，解釋不能取得稅務編號的原因 Explain why a TIN is unable to be obtained if you have selected Reason B
(1)			
(2)			
(3)			
(4)			
(5)			

第 3 部分：聲明及簽署

Part 3: Declarations and Signature

本人知悉及同意，Blue Insurance Limited ("Blue") 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) 收集本表格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居留司法管轄區的稅務當局。

本人證明，就與本表格所有相關的帳戶持有人所持有的帳戶，本人是帳戶持有人 / 本人獲帳戶持有人授權簽署本表格#。(# 刪去不適用者)

本人承諾，如情況有所改變，以致影響本表格第 1 部分所述的個人的稅務居民身分，或引致本表格所載的資料不正確，本人會通知 Blue，並會在情況發生改變後 30 日內，向 Blue 提交一份已適當更新的自我證明表格。

本人聲明就本人所知所信，本表格內所填報的所有資料和聲明均屬真實、正確和完備。

I acknowledge and agree that (a) the information contained in this form is collected and may be kept by Blue Insurance Limited ("Blue") for the purpose of automatic exchange of financial account information, and (b) such information and information regarding the account holder and any reportable account(s) may be reported by Blue to the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region and exchanged with tax authorities of another jurisdiction or jurisdictions 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).

I certify that I am the account holder/ I am authorized to sign for the account holder# of all the account(s) to which this form relates.

(# Delete as appropriate)

I undertake to advise Blue of any change in circumstances which affects the tax residency status of the individual identified in Part 1 of this form or causes the information contained herein to become incorrect, and to provide Blue with a suitably updated self-certification form within 30 days of such change in circumstances.

I declare that the information given and statements made in this form are, to the best of my knowledge and belief, true, correct and complete.

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 \$10,000) 罰款。

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. \$10,000).

索償人簽署

Signature of Claimant: _____

索償人姓名

Name of Claimant: _____

身份

Capacity: _____

(如您不是第 1 部所述的個人，說明您的身份。如果您是以受權人身份簽署這份表格，須夾附該授權書的核證副本。)
(Indicate the capacity if you are not the individual identified in Part 1. If signing under a power of attorney, attach a certified copy of the power of attorney.)

日期 (日/月/年)

Date (DD/MM/YYYY): _____