

英屬百慕達商友邦人壽保險股份有限公司台灣分公司

CRS 自我證明表（個人適用）Self-Certification Form - Individual

親愛的客戶您好，因您向本分公司辦理申請下表所列情形，為遵循「金融機構執行共同申報及盡職審查作業辦法」（CRS）之規範，須請您回答以下詢問事項。

<input type="checkbox"/> 新契約之要保人	<input type="checkbox"/> 更換要保人（新要保人）	<input type="checkbox"/> 領取：身故／滿期／祝壽／賀歲／繳清生存／生存保險金之受益人
<input type="checkbox"/> 變更或新增要保人之國家或地區的稅務居民身份為非「中華民國」及「美國」		<input type="checkbox"/> 變更或新增要保人地址為非「中華民國」及「美國」境內

本人（下稱「帳戶持有人」）具「中華民國」及「美國」以外之國家或地區的稅務居民身份

☐ 否 ☐ 是 *勾選「是」者，請以英文續填以下資料：

第一部分：個人帳戶持有人身分辨識資料 Part 1 Identification of Individual Account Holder

(若屬聯名帳戶或多人聯名帳戶，各帳戶持有人應分別填寫自我證明表。)

(For joint or multiple Account Holders, complete a separate form for each Account Holder.)

帳戶持有人 姓名*Name of Account Holder*	Last Name or Surname(s) 姓氏*	First or Given Name 名字*	Middle Name(s) 中間名*
出生日期* / 出生地 Date of Birth* / Place of Birth	Date of Birth*(dd/mm/yyyy) 出生日期*	Town or City of Birth 出生城市	Country/Jurisdiction 出生國家/地區
現行居住地 址* Current Residence Address*	Suite, Floor, Building, Street, District (if any) 室、樓層、大樓、街道、地區等(如有)		
	Town/City/Province/County/State 鎮/市/省/縣/州等		
	Country/Jurisdiction 國家/地區		
	Post Code/ZIP Code (if any) 郵政編碼/郵遞區號(如有)		
通訊地址 (與現行居住地址 不同時，填寫此欄) Mailing Address (Complete if different to the Current Residence Address)	Suite, Floor, Building, Street, District (if any) 室、樓層、大樓、街道、地區等(如有)		
	Town/City/Province/County/State 鎮/市/省/縣/州等		
	Country/Jurisdiction 國家/地區		
	Post Code/ZIP Code (if any) 郵政編碼/郵遞區號(如有)		

第二部分：稅務居住者之國家/地區及其稅務識別碼或具相當功能之辨識碼（「稅務識別碼」）*

Part 2 Country/Jurisdiction of Residence for Tax Purposes and related Taxpayer Identification Number or functional equivalent number ("TIN")*

請於下表填寫(a)帳戶持有人為稅務居住者之國家/地區，及(b)於該國家/地區稅務識別碼。

Complete the following table indicating (a) the country/jurisdiction where the Account Holder is a tax resident and (b) the Account Holder's TIN for each country/jurisdiction indicated.

帳戶持有人如同時為2個以上國家/地區稅務居住者，請填寫所有其為稅務居住者之國家/地區。

If the Account Holder is a tax resident in more than one country/jurisdiction at the same time, please indicate all countries/jurisdictions of tax residence.

如帳戶持有人為中華民國稅務居住者，填列稅務識別碼如下：

1. 具身分證字號者為身分證字號(10碼，由內政部戶政司編配)。
2. 具統一證號者為統一證號(10碼，由內政部移民署編配)。
3. 個人無身分證字號或統一證號者，以現行稅籍編號(大陸地區人民為9+西元出生年後2碼及出生月日4碼；其餘情形為西元出生年月日8碼+護照顯示英文姓名前2字母2碼)方式編配。

If the Account Holder is a tax resident of the ROC, his or her Tax Identification Number (TIN) is as follows:

1. National ID Card Number (a 10-digit code issued by the Department of Household Registration, Ministry of the Interior)
2. Uniform ID Number (a 10-digit code issued by the National Immigration Agency, Ministry of the Interior)
3. The current Taxpayer Code Number for those who have neither National ID Card Number nor Uniform ID Number is assigned as follows: Mainland China citizens are coded as 9+yy+mm+dd (for example born on October 25, 1985, the code would be 9851025); for other foreigners, yyyy+mm+dd + the first two letters of his or her English name in order printed on his or her passport. (for example, the code for David Caruso born on October 25, 1985, would be 19851025DA)



如無法提供稅務識別碼，於下列欄位填寫適用之理由 A、B 或 C：

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

理由 A - 帳戶持有人為稅務居住者之國家/地區未核發稅務識別碼

Reason A - The country/jurisdiction where the Account Holder is a tax resident does not issue TINs to its residents.

理由 B - 帳戶持有人無法取得稅務識別碼(請說明帳戶持有人無法取得稅務識別碼原因)

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 C - 帳戶持有人毋須提供稅務識別碼(限於該帳戶持有人為稅務居住者之國家/地區國內法未要求蒐集稅務識別碼)

Reason C - TIN is not required. Only select this reason if the domestic law of the relevant country/jurisdiction of tax residence does not require the collection of TIN.

稅務居住者之 國家/地區 Country/Jurisdiction of tax residence	稅務識別碼 TIN	若無法提供稅務識別碼， 填寫理由 A、B 或 C Enter reason A, B or C if no TIN available	如選取理由 B，說明帳戶持 有人無法取得稅務識別碼之原因 Explain why the Account Holder is unable to obtain a TIN if you have selected reason B

第三部分：聲明及簽署 Part 3 Declarations and Signature

1. 本人知悉，本表所含資訊、相關帳戶持有人及任何應申報帳戶資訊，將可能提供中華民國稅捐稽徵機關，經由政府間協定進行稅務目的金融帳戶資訊交換，提供帳戶持有人為稅務居住者之國家/地區稅捐稽徵機關。

I acknowledge that the information contained in this form and information regarding the Account Holder and any Reportable Account(s) may be provided to the tax authorities of the ROC and exchanged with tax authorities of another country(ies)/jurisdiction(s) in which the Account Holder may be a tax resident pursuant to intergovernmental agreements to exchange financial account information for tax purposes.

2. 本人證明，與本表相關之所有帳戶，本人為帳戶持有人(或本人業經帳戶持有人授權簽署本表)。

I certify that I am the Account Holder (or I am authorized to sign for the Account Holder) of all the account(s) to which this form relates.

3. 本人聲明，就本人所知所信，於本自我證明所為之陳述均為正確且完整。

I declare that all statements made in this declaration are, to the best of my knowledge and belief, correct and complete.

4. 本人承諾，如狀態變動致影響本表第二部分所述之個人稅務居住者身分，或所載資料不正確或不完整，本人會通知貴公司，並在狀態變動後30日內提供貴公司一份經適當更新之自我證明表。

I undertake to advise AIA International Limited Taiwan Branch("AIA") of any change in circumstances which affects the tax residency status of the individual identified in Part 2 of this form or causes the information contained herein to become incorrect or incomplete, and to provide AIA with a suitably updated self-certification form within 30 days of such change in circumstances.

本人簽名：

(The signature of mine)

法定代理人簽名：

(The signature of the legal representative)

※未滿七歲或受監護宣告尚未撤銷者，由法定代理人代為簽名及法定代理人簽名；七歲(含)以上但尚未成年者，由本人及法定代理人簽名。

The minor who has not reached their seventh year of age and A person who has become subject to the order of the commencement of guardianship has not revoked, the signature shall be provided by the legal representative. The minor who is over seven years of age but not reaching the eighteenth year of age shall sign by The minor himself and the legal representative.

保單號碼：

(Policy/Contract Number)

簽署日期：

(Date of the signature)

年 月 日

重要提示 Important Notes：

1. 金融機構執行共同申報及盡職審查作業辦法(下稱 CRS 作業辦法)規定，金融機構應蒐集及申報有關帳戶持有人稅務居住者身分之特定資訊。CRS 作業辦法係依稅捐稽徵法第5條之1第6項訂定，其內容參考經濟合作暨發展組織發布之共同申報及盡職審查準則(下稱共同申報準則)。

Under the Regulations Governing the Implementation of the Common Standard on Reporting and Due Diligence for Financial Institutions ("Regulations"), Financial Institutions ("FIs") are required to collect and report certain information about the Account Holder's tax residency status. The Regulations are enacted pursuant to Paragraph 6, Article 5-1 of the Tax Collection Act and are drafted in reference to the Common Standard on Reporting and Due Diligence for Financial Account Information (CRS) developed by the Organization for Economic Cooperation and Development (OECD).

2. 金融機構依 CRS 作業辦法規定取得帳戶持有人之自我證明文件，以辨識帳戶持有人為稅務居住者之國家/地區。金融機構依法可能將本表及該帳戶其他資訊提供中華民國稅捐稽徵機關，經由政府間協定進行稅務目的金融帳戶資訊交換，提供他方國家/地區稅捐稽徵機關。

Under the Regulations, FIs obtain a self-certification form from the Account Holder to determine the country(ies)/jurisdiction(s) in which the Account Holder is a tax resident. The FIs may be legally obliged to pass on the information in this form and other financial information with respect to the account to the tax authorities of the Republic of China (Taiwan)("ROC") and they may exchange this information with tax authorities of another country(ies)/jurisdiction(s) pursuant to intergovernmental agreements to exchange financial account information for tax purposes.

3. 除不適用或特別註明外，必須填寫這份文件所有部分。如這份文件上的空位不敷使用，可另行增列填寫。標有星號(*)欄位或部分為友邦人壽保險股份有限公司台灣分公司須向稅捐稽徵機關申報之資料。

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 or parts marked with an asterisk (*) is required to be reported by AIA to the local taxation authorities.

4. 本表將持續有效，倘狀態變動(例如帳戶持有人之稅務居住者身分變動)致所填資訊不正確或不完整，帳戶持有人應通知金融機構，並更新本表。

This form will remain valid unless there is a change in circumstances relating to information, such as the Account Holder's tax residency status, that makes this form incorrect or incomplete. In that case, the Account Holder must notify the FI and provide an updated self-certification form.

5. 本表相關用詞(如帳戶持有人、稅務識別碼、金融帳戶等)，請詳 CRS 作業辦法。

The definition of the capitalized terms used in this form, such as Account Holder, TIN, Financial Account, etc. can be found in the Regulations.