AIA Hong Kong

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Memo

Attn: All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)

From: Carol Li
Chief Life Officer

Co/Dept:

Dept: Operations

Copy: All Department Heads

Date: 7 Sep 2026

Total page: 18

Subject: (Ref: A260939) 更新 CRS 自我證明表格
Update of CRS Self-Certification form

就共同匯報標準（CRS）之稅務居民身分申報事宜，營運部現作出以下重要更新，敬請知悉並依循辦理。
此更新同時適用於核保部、保戶服務部及賠償部的申請，相關系統優化將於 2026 年 9 月 18 日推出，詳情如下:

核保部:

1. 更新自我證明表格內容
   iPoS 及紙本的自我證明表格有以下更新：
   a. 更新投保申請書
      有關投保申請書上的「申請人稅務居住地」，請見以下主要更新：

保單簽發地為香港

分類	原文/原有規則	修訂後
稅務居住地選項	(1) 只是香港的稅務居民	(1) 只是香港的稅務居民，稅務編號是香港身份證號碼
	(2) 是香港及其他司法管轄區或國家的稅務居民	(2) 是香港及其他司法管轄區或國家的稅務居民，香港稅務編號是香港身份證號碼
	(3) 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	不適用，沒有更新
填寫「稅務居住國家 / 司法管轄區」的規則	上述選擇為(2)或(3)，才須要填寫稅務居民身份及其稅務編號 / 未能提供稅務編號的原因（即不用填寫香港）。	不論上述的選擇是(1)、(2)或(3)，都必須要填寫**所有**的稅務居民身分及其稅務編號 / 未能提供稅務編號的原因。 即選擇了(1)或(2)，必須填寫香港及其稅務編號（香港身份證號碼）。

保單簽發地為澳門

分類	原文/原有規則	修訂後
稅務居住地選項	(1) 只是澳門的稅務居民	(1) 只是澳門的稅務居民，稅務編號是澳門身份證號碼或澳門稅務編號
	(2) 是澳門及其他司法管轄區或國家的稅務居民	(2) 是澳門及其他司法管轄區或國家的稅務居民，澳門稅務編號是澳門身份證號碼或澳門稅務編號
	(3) 不是澳門的稅務居民，而是其他司法管轄區或國家的稅務居民	不適用，沒有更新

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填寫「稅務居住國家 / 司法管轄區」的規則	上述選擇為(2)或(3)，才須要填寫稅務居民身份及其稅務編號 / 未能提供稅務編號的原因（即不用填寫澳門）。	不論上述的選擇是(1) 、(2)或(3)，都必須要填寫**所有**的稅務居民身分及其稅務編號 / 未能提供稅務編號的原因。 即選擇了(1)或(2)，必須填寫澳門及其稅務編號（如澳門身份證號碼）。

b. 更新自我證明表格 — 個人 / 實體 / 控權人
如申請人擁有任何身分標記但並沒有申報為該司法管轄區/國家的稅務居民，申請人必須提供其擁有身分標記之原因，相關問題的原文及主要修訂如下：

適用表格	原文*	修訂後
自我證明表格 — 個人	帳戶持有人如擁有非香港 / 澳門地址或電話，但並沒有申報為該國家之稅務居民，請詳細解釋原因。此外，如帳戶持有人如提供身份證/ 旅遊證件文件顯示為中國國籍，但沒有申報為中國稅務居民，請詳細解釋原因。	帳戶持有人如非地址或電話相應地區的稅務居民，請提供一個合理解釋及/或證明文件。此外， 如帳戶持有人如提供中國內地身份證 / 旅遊證件文件但沒有申報為中國內地的稅務居民，請提供一個合理解釋及/或證明文件。
自我證明表格 — 實體	帳戶持有人如擁有非香港 / 澳門地址或電話，但並沒有申報為該國家之稅務居民，請詳細解釋原因。	帳戶持有人如非地址或註冊地相應地區的稅務居民，請提供一個合理解釋及/或證明文件。
自我證明表格 — 控權人	帳戶持有人如擁有非香港 / 澳門地址或電話，但並沒有申報為該國家之稅務居民，請詳細解釋原因。此外，如帳戶持有人如提供身份證/ 旅遊證件文件顯示為中國國籍，但沒有申報為中國稅務居民，請詳細解釋原因。	控權人如非地址或電話相應地區的稅務居民，請提供一個合理解釋及/或證明文件。此外， 如控權人如提供中國內地身份證 / 旅遊證件文件但沒有申報為中國內地的稅務居民，請提供一個合理解釋及/或證明文件。

*香港簽署之投保申請，上述原文會顯示為“香港”
澳門簽署之投保申請，上述原文會顯示為“澳門”

2. iPoS 的優化更新

a. 自動填寫香港 / 澳門 / 中國內地的稅務編號

申請人於 iPoS 輸入香港、澳門或中國內地的身份證號碼後，如同時申報為香港、澳門或中國內地稅務居民身份時，可勾選該地區的稅務編號等同其身份證號碼，避免重覆填寫，詳細操作請參閱附件一。

b. 新增稅務編號格式的提示

稅務編號旁邊會添 加 「i」圖示，當用戶點擊此圖示後，會顯示較常見的 5 個地區/國家（香港、澳門、中國內地、英國及加拿大）的稅務編號格式或 OECD 網站的連結以供參閱，詳細操作請參閱附件二。

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c. 新增驗證稅務編號的格式

iPoS 會根據以下的條件，顯示相關提示訊息，提醒用戶核對稅務編號，詳細操作請參閱附件三。

- 輸入的香港、澳門、中國內地、英國及 / 或加拿大稅務編號格式不符合標準規格
- 輸入的資料為 N/A、NA、Null、Not Applicable、重複或連續數字、僅含英文字母或僅含符號
- 在不同的「稅務居住國家 / 司法管轄區」，輸入了相同的稅務編號

3. 更新生效日期

a. iPoS 更新將於 2026 年 9 月 18 日推出更新，詳情請留意相關通告 (iPoS 版本更新 v1.251) 。

b. 另外，新的紙本表格必須從 2026 年 10 月 1 日起提交（舊表格自 2026 年 10 月 1 日起將不再被接受）。

以下的投保申請書及自我證明表格會於 2026 年 9 月 18 日作出相應更新：

適用地區	表格	表格編號
香港	壽險及人身意外保險投保申請書	OPUAIF00
香港	財富系列投保申請書	OPUAIF48
香港	意外及醫療保險保單投保申請書	OPUAIF79
香港	自我證明表格(香港適用)	OPUAIFA77
澳門	壽險及人身意外保險投保申請書	OPMCUF13
澳門	財富相傳系列投保申請書	OPMCUF27
澳門	卓達 ／ 卓智系列計劃申請書	OPMCUF20
澳門	意外及醫療保險保單投保申請書	OPPAUF15
澳門	自我證明表格(澳門適用)	OPMCUF60

除上述更新外，其他規則維持不變。

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保戶服務部:

上述更新亦同樣適用於保戶服務部的申請，包括：iChange、紙本申請，詳情如下：

1. 更新保戶服務部相關表格
   保戶服務部相關表格將於 2026 年 9 月 18 日起更新，以配合共同匯報標準（CRS）的要求，並自 2026 年 10 月 1 日起，所有申請均須使用經修訂的表格提交，舊版本表格將不獲接受。

   如新持有人、持有人或受讓人申報其唯一稅務居住國家 / 司法管轄區為香港或澳門，可於表格內勾選以下適用選項：
   - 唯一稅務居住地為香港，稅務編號是香港身份證號碼
   - 唯一稅務居住地為澳門，稅務編號是澳門身份證號碼
   - 唯一稅務居住地為澳門，稅務編號是澳門稅務編號（勾選此選項須於表格上提供其澳門的稅務居民身分資訊及稅務編號）

表格	表格編號
私人貸款轉讓書	OPPOSF09
更改受益人 / 簽名 / 持有人 / 信託人申請表	OPPOSF29
更改通訊地址 / 聯絡電話 / 電郵地址 / 申請「友邦電子通知書」申請表格	OPPOSF30

   有關更新範例，請參閱附件四。

2. iChange 的優化更新
   a. 於「更改保單持有人」申請中自動填寫香港稅務編號
      當財務策劃顧問協助客戶於 iChange 遞交「更改保單持有人」申請時，如新持有人申報其「唯一稅務居住地為香港」並提供香港身份證作為身份證明文件，iChange 將會自動填入新持有人的香港身份證號碼為稅務編號。

   b. 新增稅務編號格式的提示
      當客戶於保戶服務申請中申報稅務管轄區時，iChange 將根據所選擇的國家地區而顯示相應的稅務編號（TIN）格式提示。
      - 如選擇 5 個較常見的地區/國家（香港、澳門、中國內地、英國及加拿大），iChange 會提供相應的稅務編號格式指引
      - 如選擇上述五個國家 / 地區以外的稅務管轄區，iChange 將提供 OECD 網站連結供客戶參考相關稅務編號要求

   c. 新增稅務編號格式驗證
      為與核保部現行的稅務編號驗證機制保持一致，iChange 將新增以下驗證規則：
      - 輸入的香港、澳門、中國內地、英國及 / 或加拿大稅務編號格式不符合相關格式要求
      - 輸入的資料為 N/A、NA、Null、Not Applicable、重複或連續數字、僅含英文字母或僅含符號
      - 於不同的「稅務居住國家 / 司法管轄區」輸入相同的稅務編號
      - 於同一個「稅務居住國家 / 司法管轄區」下填報多於一個稅務編號

   iChange 將於 2026 年 9 月 18 日優化，有關驗證範例，請參閱附件五。

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賠償部:

賠償申請表格就索償人稅務居住國家/司法管轄區申報資料部分之更新:

表格	表格編號
死亡賠償申請表（申請人書）	OPCLMF04
索償人附加資料表格	OPCLM102
指定人附加資料	OPCLM157

以上表格就索償人稅務居住國家/司法管轄區申報資料部分亦會於 2026 年 9 月 18 日作出相應更新。自 2026 年 10 月 1 日起，索償人須使用新版本表格，舊版本表格將不獲接受。

當財務策劃顧問協助客戶填寫賠償申請表格時，請留意下列事項:

1. 個人索償人如非地址或電話相應地區的稅務居民，請提供一個合理解釋及/ 或證明文件。此外，如索償人如擁有中國內地身份證/ 旅遊證件文件但沒有申報為中國內地的稅務居民，亦請提供一個合理解釋及/或證明文件。
2. 實體索償人如非地址或註冊地相應地區的稅務居民，請提供一個合理解釋及/ 或證明文件。
3. 新版本表格增設最多 5 個申報地區/國家，亦會就索償人的稅務居民身分作出更詳細說明。倘索償人擁有任何身分標記而未有提供合理解釋，我們將視其身分標記之相應地區/國家為該索償人的稅務居民身分而作出後續跟進處理。
4. 新版本表格提供額外位置讓索償人解釋其稅務居民身分之疑問。
5. 即使索償人只是香港或澳門本地居民，亦必需按其居住地而申報香港或澳門之稅務居民身分。香港或澳門居民的稅務編號是香港或澳門身份證號碼。

如有任何查詢，請於 iEngage/PES 使用 Chatbot 進行查詢。澳門地區可親臨營運服務中心查詢。

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Regarding tax residency self-certification under the Common Reporting Standard (CRS), Operation is issuing the following important updates. Please take note and follow the instructions accordingly.
This update applies to applications from the Underwriting, Policy Owner Service, and Claims Departments. Related system enhancement will be released on September 18, 2026. Details are as follows:

Underwriting:

1. Updates to the Self-Certification Forms
   The self-certification forms in both iPoS and paper format will be updated as follows.

   a. Updates to the Insurance Application Form
      For the "Applicant's tax residency" question on the insurance application form, the main updates are as follows:

Policy issued in Hong Kong

Category	Original / previous rule	Revised
Tax residency options	(1) a tax resident of Hong Kong only	(1) A tax resident of Hong Kong only, and the TIN is the Hong Kong Identity Card Number
	(2) a tax resident of Hong Kong and also some other jurisdictions or countries	(2) A tax resident of Hong Kong and also some other jurisdictions or countries, and the Hong Kong TIN is the Hong Kong Identity Card Number
	(3) not a tax resident of Hong Kong, but instead a tax resident of some other jurisdictions or countries	Not applicable (no change)
Rules for completing "Country/Jurisdiction of tax residence"	Only when (2) or (3) is selected, it is necessary to provide tax residency(ies) and TIN(s) / "reason(s) for no TIN available" (i.e., Hong Kong does not need to be completed).	Regardless of whether (1), (2) or (3) is selected, all tax residencies and the corresponding TIN(s) / "reason(s) for no TIN available" must be completed. That is, if (1) or (2) is selected, Hong Kong and its TIN (HKID number) must be completed.

Policy issued in Macau

Category	Original / previous rule	Revised
Tax residency options	(1) a tax resident of Macau only	(1) A tax resident of Macau only, and the TIN is the Macau Identity Card Number or Macau Tax Identification Number
	(2) a tax resident of Macau and also some other jurisdictions or countries	(2) A tax resident of Macau and also some other jurisdictions or countries, and the Macau TIN is the Macau Identity Card Number or Macau Tax Identification Number
	(3) not a tax resident of Macau, but instead a tax resident of some other jurisdictions or countries	Not applicable (no change)

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Rules for completing "Country/Jurisdiction of tax residence"	Only when (2) or (3) is selected, it is necessary to provide tax residency(ies) and TIN(s) / "reason(s) for no TIN available" (i.e., Macau does not need to be completed).	Regardless of whether (1), (2) or (3) is selected, all tax residencies and the corresponding TIN(s) / "reason(s) for no TIN available" must be completed. That is, if (1) or (2) is selected, Macau and its TIN (e.g., Macau Identity Card number) must be completed.

b. Updates to Self-Certification Form — Individual / Entity / Controlling Person
If an applicant has any indicia but does not declare himself/herself as a tax resident of that jurisdiction/country, the applicant must provide the reason for having such indicia. The original wording and the major revised wording of this question are updated as follows:

Applicable form	Original*	Revised
Self-Certification Form — Individual	If account holder has non-Hong Kong/Macau address or telephone number but without declaring as the Tax residence of that country, please explain in details. In addition, if account holder has provided identification / travelling documents that indicate his / her Chinese nationality but without declaring as China Tax resident, please explain in details.	If the account holder is not a tax resident in the country or region of the address or telephone number, please provide a reasonable explanation and/or documentary evidence. In addition, if the account holder has provided relevant Chinese identification / travelling documents but without declared as the tax resident in Chinese Mainland, please provide a reasonable explanation and/or documentary evidence.
Self-Certification Form — Entity	If account holder has non-Hong Kong/Macau address or telephone number but without declaring as the Tax residence of that country, please explain in details.	If the account holder is not a tax resident in the country or region of the address or place of incorporation, please provide a reasonable explanation and/or documentary evidence.
Self-Certification Form — Controlling Person	If account holder has non-Hong Kong/Macau address or telephone number but without declaring as the Tax residence of that country, please explain in details. In addition, if account holder has provided identification / travelling documents that indicate his / her Chinese nationality but without declaring as China Tax resident, please explain in details.	If the controlling person is not a tax resident in the country or region of the address or telephone number, please provide a reasonable explanation and/or documentary evidence. In addition, if the controlling person has provided relevant Chinese identification / travelling documents but did not declare to be tax resident in Chinese Mainland, please provide a reasonable explanation and/or documentary evidence.

*For insurance applications signed in Hong Kong, the wording above will show "Hong Kong".
For insurance applications signed in Macau, the wording above will show "Macau".

2. iPoS Enhancement Updates

a. Auto-fill Hong Kong / Macau / Chinese Mainland TIN

After an applicant enters a Hong Kong, Macau or Chinese Mainland identity card number in iPoS, if they also declare tax residence in Hong Kong, Macau or Chinese Mainland, they can tick the option indicating that the TIN for that country/ region is the same as the identity card number, to avoid duplicate entry. For detailed steps, please refer to Appendix 1.

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b. New reminder on TIN format

An "i" icon will be added next to the TIN field. When users click the icon, the TIN formats for five commonly used jurisdictions/countries (Hong Kong, Macau, Chinese Mainland, the United Kingdom and Canada) or a link to the OECD website will be displayed. For detailed steps, please refer to Appendix 2.

c. New validation of TIN format

Based on the following conditions, iPoS will display reminder messages prompting users to verify the TIN. For detailed steps, please refer to Appendix 3.

- The TIN format entered for Hong Kong, Macau, Chinese Mainland, the UK and/or Canada does not meet the standard format
- The information entered contains invalid values, including "N/A", "NA", "Null", "Not Applicable"; repeated or consecutive numbers; letters only; or symbols only
- The same TIN has been entered under different "Country/Jurisdiction of tax residence"

3. Effective Dates
   a. The iPoS update will be launched on 18 September 2026. Please refer to related notice (iPoS version update v1.251) for details.
   b. The new paper forms must be submitted starting from **1 October 2026** (the old forms will no longer be accepted from **1 October 2026**).

The following insurance application forms and self-certification forms will be updated accordingly on 18 September 2026:

Region	Form Name	Form No.
HK	Life & PA Insurance Application Form	OPUAIF00
HK	Wealth Preserver Series Application Form	OPUAIF48
HK	Accident & Health Insurance Application Form	OPUAIF79
HK	Self-Certification Form (For Hong Kong)	OPUAIFA77
Macau	Life and Personal Accident Insurance Application Form	OPMCUF13
Macau	Wealth Preserver Series Application Form	OPMCUF27
Macau	Treasure Series Plan Application Form	OPMCUF20
Macau	Accident & Health Insurance Application Form	OPPAUF15
Macau	Self-Certification Form (For Macau)	OPMCUF60

Other rules remain unchanged.

Policy Owner Service:

The above updates are also applicable to POS application, including iChange and paper form submission. Details are as follows:

1. Updates to the POS request form
   The relevant POS forms will be updated with effect from 18 September 2026 to align with the Common Reporting Standard (CRS) requirements. From 1 October 2026 onwards, all applications must be submitted using the revised forms. Previous versions of the forms will no longer be accepted.

   Where the new policyowner, policyowner, or assignee declares that Hong Kong or Macau is their sole country/jurisdiction of tax residence, one of the following options may be selected:

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- Tax resident of Hong Kong only, and the TIN is the Hong Kong Identity Card Number
- Tax resident of Macau only, and the TIN is the Macau Identity Card Number
- Tax resident of Macau only, and the TIN is the Macau Tax Identification Number* (customer selecting this option will be required to provide their Macau tax residency information and TIN in the relevant section of the form).

Form Name	Form No.
Collateral Security for Personal Loan	OPPOSF09
Request for Change of Beneficiary / Signature / Ownership / Trustee (for AIA Enquiry Express)	OPPOSF29
Request Form for Change of Address / Telephone Number(s) / Email Address / Application for "AIA e-Advice"	OPPOSF30

Please refer to Appendix 4 for samples of the updated forms.

2. iChange Enhancements

a. Auto-population of Hong Kong TIN in Request of Change of Ownership

When a financial planner assists a customer in submitting a Change of Ownership request via iChange, if the new policyowner declares that Hong Kong is the sole jurisdiction of tax residence and provides a Hong Kong Identity Card as the identity document, iChange will automatically populate the Hong Kong Identity Card number as the tax identification number (TIN).

b. New guidance of TIN format

When a customer declares a tax jurisdiction in a POS application, iChange will display the relevant TIN format guidance based on the selected country/jurisdiction.

- For the five most common jurisdictions (Hong Kong, Macau, Chinese Mainland, the United Kingdom and Canada), iChange will provide jurisdiction-specific TIN format guidance.
- For jurisdictions other than the five listed above, iChange will provide a link to the OECD website for customers' reference on TIN requirements.

c. New validation of TIN format

To align with the TIN validation mechanism adopted by the Underwriting, the following validation rules will be implemented in iChange:

- The TIN entered for Hong Kong, Macau, Chinese Mainland, the United Kingdom and/or Canada does not comply with the prescribed format requirements.
- The information entered contains invalid values, including "N/A", "NA", "Null", "Not Applicable", duplicate or consecutive numbers, alphabetic characters only, or symbols only.
- The same TIN has been entered under different Countries / Jurisdictions of Tax Residence.
- More than one TIN is provided for the same Country / Jurisdiction of Tax Residence.

iChange will be updated on 18 September 2026. For details of the enhanced functionalities and validation scenarios, please refer to Appendix 5.

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Claims:
Update to Tax Residence Declaration Information in the claim forms:

Form Name	Form No.
APPLICATION FORM FOR DEATH CLAIM (CLAIMANT'S STATEMENT)	OPCLMF04
SUPPLEMENTARY INFORMATION OF CLAIMANT	OPCLM102
SUPPLEMENTARY INFORMATION OF DESIGNATED PERSON	OPCLM157

The section relating to the claimant's declaration of tax residence country/jurisdiction relevant forms will be updated with effect from 18 September 2026. From 1 October 2026 onward, claimants must use the new version of the forms. Previous versions will no longer be accepted.

When Financial Planners assist clients in completing claim application forms, please pay attention to the following:

1. If the individual claimant is not a tax resident of the jurisdiction corresponding to his/her address or telephone number, please provide a reasonable explanation and/or supporting documentation. In addition, if the claimant possesses a Chinese Mainland identity card and/or travel document but has not declared tax residency in Chinese Mainland, please also provide a reasonable explanation and/or supporting documentation.

2. If the corporate claimant is not a tax residence of the jurisdiction corresponding to their address or place of incorporation, please provide a reasonable explanation and/or supporting documentation.

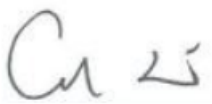
3. The new version of the forms allows the declaration of up to five tax residence jurisdictions/countries and provides more detailed guidance regarding tax residency status. If a claimant possesses any indicia and fails to provide a reasonable explanation, the corresponding jurisdiction/country associated with the indicia will be regarded as the claimant's tax residence and proceed with the necessary follow-up actions accordingly.

4. The new version of the forms includes additional space for claimants to explain any uncertainties or special circumstances regarding their tax residency status.

5. Even if a claimant is solely a local resident of Hong Kong or Macau, he/she must still declare Hong Kong or Macau as his/her tax residence according to the place of residence. For Hong Kong or Macau residents, the Tax Identification Number is the Hong Kong Identity Card number or Macau Identity Card number, as applicable.

Should you have any queries, please enquire by using Chatbot in iEngage/PES. For Macau region, please visit Operations Enquiry Counter for details.

Regards,



Carol Li
Chief Life Officer

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附件一 – 自動填寫香港 / 澳門 / 中國內地的稅務編號
Appendix 1 - Auto-fill Hong Kong / Macau / Chinese Mainland TIN

如申請人在填寫個人資料時已輸入香港、澳門或中國內地的身份證號碼，於申報稅務居民身分時，可直接勾選「該地區的稅務編號與身份證號碼相同」。系統將自動帶出其身份證號碼，無需再次輸入。

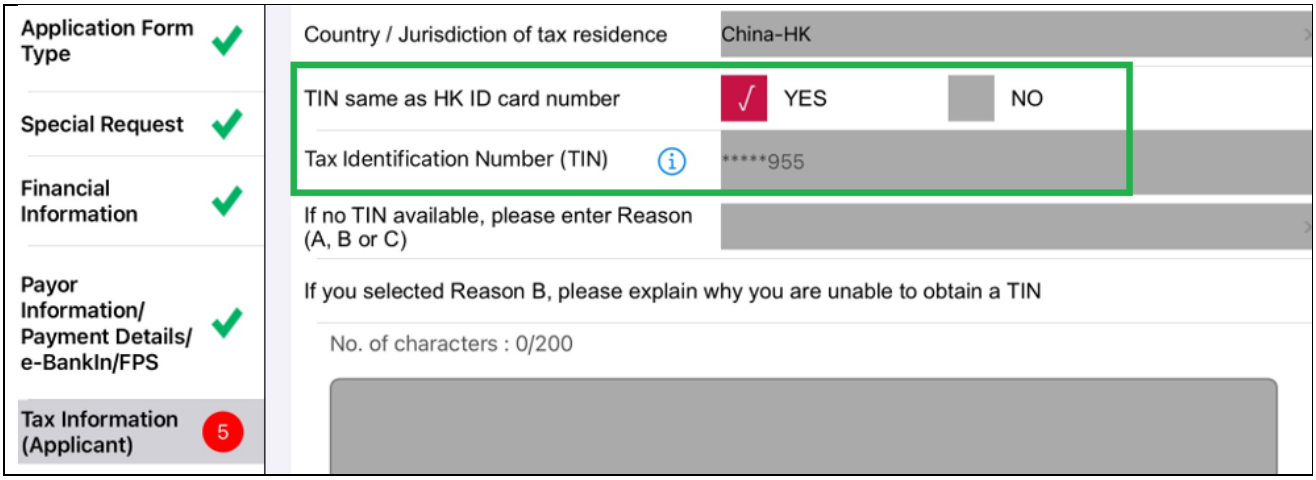


如果申請人在 iPoS 輸入了香港身份證號碼，「稅務資料 （申請人） 」版面會顯示「稅務編號與香港身份證號碼相同」欄位供勾選：

- 如勾選「是 」，iPoS 會自動將申請人的香港身份證號碼填入「稅務編號」
- 如勾選「否」，必須自行輸入「稅務編號」

此優化同時適用於輸入了澳門或中國內地的身份證號碼的申請

If the applicant has already entered their Hong Kong, Macau, or Chinese Mainland identity card number when completing their personal information, they may simply select the option indicating that the Tax Identification Number (TIN) for that jurisdiction is the same as their identity card number when declaring their tax residency status. The system will then automatically populate the identity card number, eliminating the re-enter need.



If the applicant entered his/her Hong Kong Identity Card number on iPoS, the "Tax Information (Applicant)" section will display a "TIN same as HK ID card number" field for selection.

- If "Yes" is selected, iPoS will automatically fill in the Applicant's Hong Kong Identity Card number in the "Tax Identification Number (TIN)" field.
- If "No" is selected, "Tax Identification Number (TIN)" is required to enter manually

This enhancement also applies to applications that entered Macau or Chinese Mainland identity card number.

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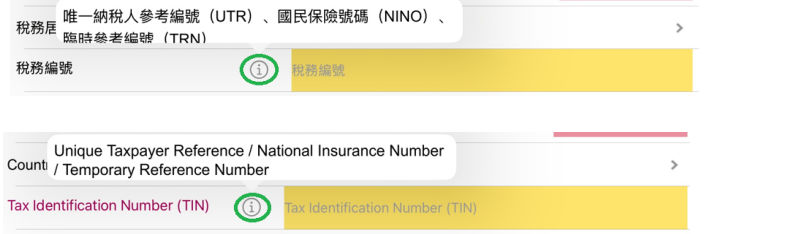
附件二 – 新增稅務編號格式的提示
Appendix 2 – New reminder on TIN format

在稅務編號欄位旁新增「i」資訊圖示。當點擊後，可查看香港、澳門、中國內地、英國及加拿大的稅務編號格式，或透過 OECD 網站連結獲取更多參考資訊。
Add an information icon ("i") next to the Tax Identification Number (TIN) field. Upon clicking the icon, the TIN formats for Hong Kong, Macau, Chinese Mainland, the United Kingdom, and Canada will be displayed. A link to the OECD website will also be provided for users to access additional information and country-specific TIN guidance.

選擇的居住國家/司法管轄區 Country / Jurisdiction of tax residence selected	點擊「i」資訊圖示，會顯示稅務編號格式的提示 By clicking the "i" icon, a prompt message shows the reminder of TIN format.
香港 Hong Kong	
澳門 Macau	
中國內地 Chinese Mainland	
英國 United Kingdom	

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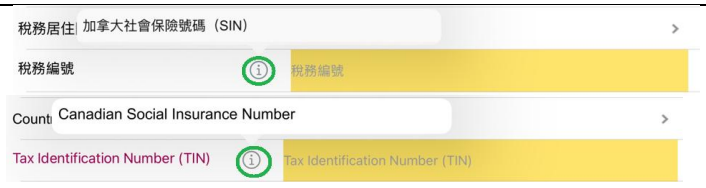
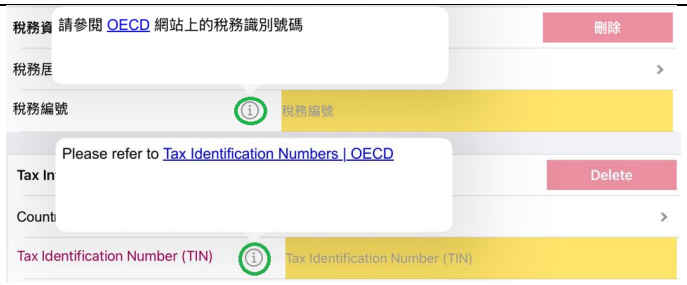
加拿大 Canada	
其他(除了以上的國家／地區) Others (in addition to the countries/regions mentioned above)	

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附件三 – 新增驗證稅務編號的格式
Appendix 3 - New validation of TIN format

系統將根據以下情況顯示相應提示訊息，提醒用戶核對所輸入的稅務編號（TIN）：
Reminder message will be prompted out to verify the Tax Identification Number (TIN) if any of the following conditions are met:

驗證 Validation	稅務編號格式的提示 Validation of TIN format
輸入的香港、澳門、中國內地、英國及／或加拿大稅務編號格式不符合相關標準規格 The TIN format entered for Hong Kong, Macau, Chinese Mainland, the UK and/or Canada does not meet the standard format	 
輸入的資料格式不正確 （例如:N/A、NA、Null、Not Applicable、重複或連續數字、僅含英文字母或僅含符號） The format of the information entered is invalid (e.g. N/A, NA, Null, Not Applicable, repeated or sequential numbers, alphabetic characters only, or special symbols only)	 
於不同的「稅務居住國家 / 司法管轄區」輸入相同的稅務編號	

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The same TIN has been entered under different Countries / Jurisdictions of Tax Residence.	 

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附件四 – 保戶服務部表格更新範例
Appendix 4 – Examples of Updated Policy Owner Services Forms

New Owner / Trustee's Country / Jurisdiction of Tax Residence* 新持有人 / 信託人稅務居住國家 / 司法管轄區*：

You must provide the following information 你必須填寫以下資料：

☐ Tax resident of Hong Kong only, and the TIN is the Hong Kong Identity Card Number
唯一稅務居住地為香港，稅務編號是香港身份證號碼

☐ Tax resident of Macau only, and the TIN is the Macau Identity Card Number
唯一稅務居住地為澳門，稅務編號是澳門身份證號碼

☐ Tax resident of Macau only, and the TIN is the Macau Tax Identification Number*
唯一稅務居住地為澳門，稅務編號是澳門稅務編號*
*Please provide the tax residency information for Macau and Tax Identification Number in the section below.
*請於下方提供澳門的稅務居民身分資訊及稅務編號

	Country / Jurisdiction of tax residence 稅務居住國家 / 司法管轄區	Tax Identification Number (TIN) 稅務編號	If no TIN available, please enter Reason (A, B or C) 如未能提供稅務編號,請註明原因 (A, B 或 C)	If you selected Reason B, please explain why you are unable to obtain a TIN 倘若閣下選擇原因B，請在下列說明為何閣下未能取得稅務編號
1				
2				
3				
4				
5				

Reason A – The country / jurisdiction where the new owner / trustee is resident does not issue TINs to its residents
原因 A - 新持有人 / 信託人所屬之國家 / 司法管轄區沒有為其居民設立稅務編號
Reason B – The new owner / trustee is otherwise unable to obtain a TIN or equivalent number (Please explain why you are unable to obtain a TIN in the above table if you have selected this reason)
原因 B - 新持有人 / 信託人未能獲得稅務編號或有同等功能的編號（若選擇本原因，請於上表說明為何閣下未能取得稅務編號）
Reason C – No TIN is required (Note: Only select this reason if the domestic law of the relevant jurisdiction does not require the collection of the TIN issued by such jurisdiction)
原因 C - 不需要提供稅務編號（備註：倘有關下所屬之司法管轄區的相關本地法律並不需要收集稅務編號，方可選擇此個原因）

Important Note 注意事項：

Should you declared the OECD (Organisation for Economic Co-operation and Development) designated Residence / Citizenship by Investment schemes country(ies) as your sole tax residency status, please complete **Supplementary Form for Common Reporting Standard** (please refer to your agent / broker should you request for a copy). Please refer to OECD website for details of Residence / Citizenship by Investment schemes country(ies) : https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/residence-citizenship-by-investment/ 如閣下只聲明經商合作與發展組織（經合組織）所指的RBI / CBI投資移民計劃之國家之稅務居民身分，請填妥共同匯報標準附加表格（請向閣下之營業員 / 經紀索取此表格）。
RBI / CBI投資移民計劃之國家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/

The Company is required by the laws to conduct due diligence on the new owner / trustee with respect to his / her / their tax residency status, collect the required information and furnish a return to the governmental authorities. If there is any uncertainty about tax residency status, it is suggested that the new owner / trustee shall disclose the information in the above table and consult also your own tax advisor.
本公司是根據法律要求就新持有人 / 信託人之稅務居民身分進行盡職調查，並收集所需資料及提供給政府機關。如新持有人 / 信託人對稅務居民身分有任何疑問，請於上述表格內表述並應諮詢你的稅務顧問。

* For new owner is a corporate , please complete "Self Certification Form – Entity" as required by the laws. If the entity is classified as passive NFE, please also complete "Self Certification Form – Controlling Person" for each identified controlling person.
* 倘以公司名義之新持有人，必須根據法律要求遞交「自我證明表格 - 實體」。如有關公司持有人之公司類別為被動非財務實體，每一位控權人必須填寫「自我證明表格 - 控權人」。

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附件五 – iChange 的優化更新
Appendix 5 – iChange Enhancements

新增稅務編號格式的提示：
New guidance of TIN format：

地區/國家 Jurisdiction/Country	稅務編號格式的提示 Guidance of TIN format
香港 Hong Kong	ⓘ 個人：香港身份證（HKID）號碼 2468068% ⓘ Individuals: Hong Kong Identity Card (HKID) number
澳門 Macau	ⓘ 個人：澳門身份證（MOID）號碼或澳門納稅人號碼 ⓘ Individuals: Macau Identity Card (MOID) number or Macau Taxpayer number
中國內地 Chinese Mainland	ⓘ 個人：中華人民共和國居民身份證／其他種類，請參閱 OECD網站上的稅務識別號碼 ⓘ Individuals: China ID card / Other types of TIN, please refer to Tax Identification Numbers | OECD
英國 United Kingdom	ⓘ 個人：唯一納稅人參考編號（UTR）、國民保險號碼（NINO）、臨時參考編號（TRN ⓘ Individuals: Unique Taxpayer Reference / National Insurance Number / Temporary Reference Number
加拿大 Canada	ⓘ 個人：加拿大社會保險號碼（SIN） ⓘ Individuals: Canadian Social Insurance Number
Others Country/ Jurisdiction	ⓘ 請參閱 OECD網站上的稅務識別號碼 ⓘ Please refer to Tax Identification Numbers | OECD

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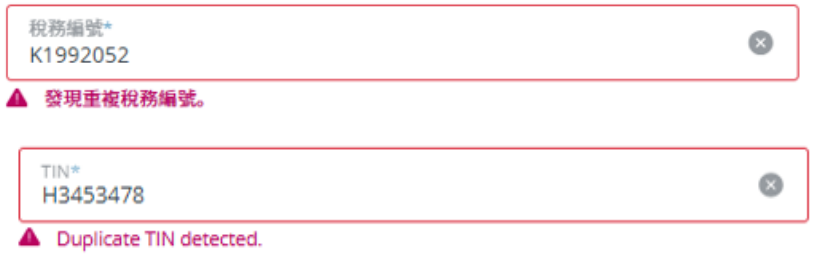
新增稅務編號格式驗證：

New validation of TIN format

驗證 Validation	稅務編號格式的提示 Validation of TIN format
於不同的「稅務居住國家 / 司法管轄區」輸入相同的稅務編號 The same TIN has been entered under different Countries / Jurisdictions of Tax Residence.	
輸入的資料格式不正確（例如:N/A、NA、Null、Not Applicable、重複或連續數字、僅含英文字母或僅含符號） The format of the information entered is invalid (e.g. N/A, NA, Null, Not Applicable, repeated or sequential numbers, alphabetic characters only, or special symbols only)	

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