



Individual Tax Residency Self-Certification Form (CRS-I(HK))

Instructions

Please read the following instructions before completing this form.

Why are we asking you to complete this form?

To help protect the integrity of tax systems, governments around the world have introduced a information-gathering and reporting requirement for financial institutions. This is known as the Common Reporting Standard (the "CRS").

Under the CRS, we are required to determine where you are a "tax resident" (this will usually be where you are liable to pay income taxes). If you are a tax resident outside the jurisdiction where your account is held, we may need to give the relevant tax authority this information, along with information relating to your accounts. That may then be shared between different jurisdictions' tax authorities.

Completing this form will ensure that we hold accurate and up to date information about your tax residency. If your circumstances change and any of the information provided in this form becomes incorrect, please let us know immediately and provide an updated self-certification.

Who should complete the Individual Tax Residency Self-Certification Form?

Individual customers should complete this form.

If you need to self-certify on behalf of an entity (which includes businesses, trusts and partnerships), complete an "Entity Tax Residency Self-Certification Form" (CRS-E (HK)). Similarly, if you are a controlling person of an entity, complete a "Controlling Person Tax Residency Self-Certification Form" (CRS-CP (HK)). You can find these forms at www.crs.hsbc.com/en/cmb/hongkong.

For joint account holders, each individual will need to complete a separate form.

Even if you have already provided information in relation to the United States Government's Foreign Account Tax Compliance Act (FATCA), you may still need to provide additional information for the CRS as this is a separate regulation.

Where to go for further information?

If you have any questions about this form or these instructions, please visit: www.crs.hsbc.com/en/rbwm/hongkong or call us on (852) 2233 3000 for Personal Banking customers.

The Organisation for Economic Co-operation and Development ("OECD") has developed the rules to be used by all governments participating in the CRS and these can be found on the OECD's Automatic Exchange of Information ("AEOI") website.

Please also visit the website of the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region that sets out information relating to the implementation of AEOI in Hong Kong: www.ird.gov.hk/eng/tax/dta_aeoi.htm.

If you have any questions on how to define your tax residency status, please visit the OECD website, or speak to your tax advisor as we are not allowed to give tax advice.

Important Notes:

This is a self-certification form provided by you as an account holder to a reporting financial institution for the purpose of automatic exchange of financial account information. The data collected may be transmitted by the reporting financial institution to the Inland Revenue Department for transfer to the tax authority of another jurisdiction.

You as an account holder should report all changes in your tax residency status to the reporting financial institution.

Individual Tax Residency Self-Certification Form

CRS – I

Part 1

Identification of Individual Account Holder

A. Name of Account Holder:

Last Name or Surname	<input type="text" value="REDACTED"/>				
Title	<input checked="" type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Miss	Other <input type="text"/>
First or Given Name	<input type="text" value="REDACTED"/>				
Middle Name(s)	<input type="text"/>				

B. Current Residence Address:

Line1 and Line2	<input type="text" value="REDACTED"/>		
Line3 and Line4	<input type="text" value="JAPAN,"/>		
Country/Region	<input type="text" value="Japan"/>	Postal/ZIP code	<input type="text"/>

C. Date of birth

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

Please complete below section by providing:

- (i) each jurisdiction where you are a resident for tax purposes and
- (ii) TIN for each jurisdiction indicated.

If you are a tax resident of Hong Kong, the TIN is the Hong Kong Identity Card Number (HKID).

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

- Reason A** The jurisdiction where you are a resident for tax purposes does not issue TINs to its residents.
- Reason B** You are unable to obtain a TIN.
- Reason C** TIN is not required. Select this reason only if the authorities of the jurisdiction of tax residence do not require the TIN to be disclosed.

Jurisdiction of Tax Residence		TIN	Enter Reason A, B or C if no TIN is available
1	Japan		
2			
3			
4			
5			

Explain why the account holder is unable to obtain a TIN if you have selected **Reason B**.

1	
2	
3	
4	
5	

Part 3

Declarations and Signature

Declaration

By completing and submitting the form, I acknowledge and agree that (a) the information contained in this form is collected and may be kept by The Hongkong and Shanghai Banking Corporation Limited (the "Bank") 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 the Bank to the Inland Revenue Department of the Government of the Hong Kong Special Administrative Region and exchanged with the tax authorities of another jurisdiction(s) 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 also agree that the information contained in this form may be shared to and used by any member of the HSBC Group (meaning HSBC Holdings plc, its affiliates, subsidiaries, associated entities and any of their branches and offices) for the purposes of automatic exchange of financial account information provided under the Inland Revenue Ordinance as set out above.

I certify that I am the account holder of all the account(s) currently held with the Bank by the individual identified in Part 1 of this form.

I undertake to advise the Bank 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 the Bank 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.

I confirm I have included ALL of the jurisdictions in which I am tax resident.

WARNING: It is a serious offence under 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. Heavy penalty may apply upon conviction.

Signature:


Digitally signed by: Matsunaga Toshikazu. Date: 2025.09.03 01:03:02 UTC

Print name:



Date:

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