



Update of Client' s Information (Individual/ Joint Client)  
客戶資料更新表格 (個人/聯名賬戶)

Account Type 賬戶類別	<input type="checkbox"/> Individual 個人賬戶 <input type="checkbox"/> Cash 現金賬戶 <input type="checkbox"/> Joint Account 聯名賬戶 <input type="checkbox"/> Margin 孖展賬戶
Account Name 賬戶名稱	
Account Number 賬戶號碼	
Name of Joint Account Holder 聯名賬戶持有人姓名 (For Joint Account only 只適用於聯名賬戶)	

- Please fill out those sections of the form which you have not provided before or if the relevant information which you previously provided to us has changed, that you have to inform us of the change(s). Also we shall assume there is no change of your relevant information which you have not provided in the form.  
如閣下從未向本公司就此表格相關部份提供資料或有關資料已更改而需要通知本公司，請填妥此表格相關部份。  
另外，如在表格上並未有提供資料，閣下的現有有關資料會被視為並無更改。
- You should undertake to promptly notify us if you become or cease be employed by any SFC' s licensed or registered person to carry on regulated activities as defined in the Ordinance.  
閣下承諾如將受僱或不再受僱於任何受香港證券及期貨事務監察委員會監察之持牌法團或註冊機構，或將從事或不再從事條例界定的受規活動時，須立即通知本公司。
- Please note that when there is update of customer profile information for each holder of a Joint Account at the same time, each holder is required to submit this form separately.  
請注意，如各聯名賬戶持有人之個人資料需同時更改，各持有人需個別提交此表格。
- Please note that the contact information of primary account holder would be treated as contact information of the Joint Account.  
請注意，第一賬戶持有人之通訊信息將視作聯名賬戶之通訊信息。
- Please note update of any customer profile information will be applied to all of your accounts maintained with Guotai Junan Group.  
請注意，客戶個人資料之更改將適用於閣下於國泰君安集團開立之所有賬戶。

(I) CHANGE OF CUSTOMER PROFILE INFORMATION 更改客戶個人資料  
(Please tick ✓ the appropriate box 請勾選適當空格 ✓)

<input type="checkbox"/> Change of Identity Document 更新身份證明文件
If you have updated any of your identity documents, please provide the certified true copy of new identity card/passport and the update Identity Document information (if any). 倘若已更新任何身份證明文件，請提供經簽名驗證的新身分證或護照複印本並填寫倘有新的證件訊息。
<input type="checkbox"/> Type of Identity Document 證件類別 <input type="checkbox"/> No. 證件號碼 <input type="checkbox"/> Place of Issue 證件發出地

<input type="checkbox"/> Change of Correspondence Address 更改通訊地址	
New Correspondence Address 新通訊地址	
<input type="checkbox"/> Change of Residential Address 更改住宅地址	
Please provide the original or copy of statements which was issued within the latest 1 year as address proof. 請提供最近1年內發出的結單正本或複印本作地址證明。	
New Residential Address 新住宅地址	

<input type="checkbox"/> Change of mailing method (please select either one) 更改通訊方式 (只選一項)
<input type="checkbox"/> By E-mail Address 電郵地址 <input type="checkbox"/> By Company E-mail Address 公司電郵地址



<input type="checkbox"/> Update email address 更新電郵地址	
New Email address 新電郵地址	
<input type="checkbox"/> Subscribe / Unsubscribe* research reports sent by email 選擇 / 拒絕* 以電郵收取研究報告	
*Please delete as inappropriate 請刪去不適用者	

<input type="checkbox"/> Change of Telephone Number 更改電話號碼	
(Country Code) Mobile Phone No. (國家區號) 手提電話號碼	( )
(Country Code) Home Tel. No. (國家區號) 住宅電話號碼	( )
(Country Code) Office Tel. No. (國家區號) 辦公室電話號碼	( )

<input type="checkbox"/> Change of OTP setting 更改“一次性驗證碼”設置	
<input type="checkbox"/> Same as above Mobile Phone No. 手提電話號碼同上	
<input type="checkbox"/> Mobile Phone No. for OTP 獲取“一次性驗證碼”手提電話號碼	( )

<input type="checkbox"/> Change of Nationality 更改國籍	New Nationality 新國籍:
Please provide the certified true copy of identity card / passport 請提供經簽名驗證的身份證或護照複印本。	

<input type="checkbox"/> Change of Other Customer Profile Information 更改其他客戶個人資料
Please Specify 請註明：

<input type="checkbox"/> Change of Martial Status 更改婚姻狀況			
<input type="checkbox"/> Single 單身	<input type="checkbox"/> Married 已婚	<input type="checkbox"/> Divorced 離婚	<input type="checkbox"/> Widowed 喪偶

<input type="checkbox"/> Change of Tax Residency 更改稅務居民所在國家/司法管轄	New Tax Residency 新稅務居民所在國家/司法管轄:
請填寫及簽署通用報送標準 (CRS) 自證證明及(或) 個人海外賬戶稅收合規法案聲明自行認證。 Please provide the Common Reporting Standards (CRS) Self-Certification Form and (or) Individual FATCA Self-Certification.	

<input type="checkbox"/> Change of Employment 更改就業情況	
<input type="checkbox"/> Employed 受僱 <input type="checkbox"/> Unemployed 無業 <input type="checkbox"/> Self-employed 自僱 <input type="checkbox"/> Retired 退休 <input type="checkbox"/> Housewife 家庭主婦 <input type="checkbox"/> Student 學生	
Employer / Occupation Industry 僱主/職業行業 (Please refer Appendix A for List of Industries and fill in the relevant number 行業列表請參考附錄甲，並填寫相關代號)	
Name of Employer 僱主/自僱機構名稱	
Position 職位	
Office Address 辦公室地址	
Company Email Address (Optional) 公司電郵地址(可選填)	

<input type="checkbox"/> Change of Financial Profile 更改財務狀況			
Annual Income (HK\$) 全年收入(港幣)	<input type="checkbox"/> ≤ \$250,000	<input type="checkbox"/> \$250,001-\$500,000	<input type="checkbox"/> \$500,001-\$1,000,000
	<input type="checkbox"/> \$1,000,001-\$5,000,000	<input type="checkbox"/> \$5,000,001-\$10,000,000	
	<input type="checkbox"/> >\$10,000,000 please specify 須註明: _____		
Net Worth (HK\$) 淨資產(港幣)	<input type="checkbox"/> ≤ \$500,000	<input type="checkbox"/> \$500,001-\$1,000,000	<input type="checkbox"/> \$1,000,001-\$5,000,000
	<input type="checkbox"/> \$5,000,001-\$10,000,000	<input type="checkbox"/> \$10,000,001-\$50,000,000	<input type="checkbox"/> \$50,000,001-\$100,000,000
	<input type="checkbox"/> >\$100,000,000 please specify 須註明: _____		



Source of Funds 資金來源	<input type="checkbox"/> Salary/Business Income 薪俸/營業收入 <input type="checkbox"/> Return on Investments 投資回報	<input type="checkbox"/> Pension 退休金 <input type="checkbox"/> Others :其他 _____
Source of Wealth 財富來源	<input type="checkbox"/> Salary/Business Income 薪俸/營業收入 <input type="checkbox"/> Sale of Investments 投資回報 <input type="checkbox"/> Retirement Funds 退休金 <input type="checkbox"/> Others : 其 他 : _____	<input type="checkbox"/> Savings 儲蓄 <input type="checkbox"/> Inheritance/Gift 遺產/贈物(Please fill Appendix B 請填附錄乙) <input type="checkbox"/> Sale of Property/Assets 出售物業/資產

☐ **Update of Investor Status 更新投資者身分**

Are you a professional Investor? 您是否為專業投資者?

- ☐ Yes 是 (If yes, please complete and return the professional investor declaration form. 如果是，請填寫並交回專業投資者聲明書)  
☐ No 不是

☐ **Other Disclosures 其他資料披露**

Are you the ultimate beneficial owner ( "UBO" ) of this Account / person ultimately benefiting from the transactions and bearing the risk?  
你是否此賬戶的最終實益擁有人/最終受益於交易及承擔風險人士/最終負責發出指示的人士?

- ☐ Yes 是    ☐ No 不是 (If no, full KYC information and Identity documents of 3<sup>rd</sup> party are required. 如果不是，需提供第3方之詳細資料及身份證明文件。)

Are you the person ultimately responsible for originating instructions for the account?

你是否向戶口最終負責發出指示的人士?

- ☐ Yes 是    ☐ No 不是 (If no, full KYC information and Identity documents of 3<sup>rd</sup> party are required. 如果不是，需提供第3方之詳細資料及身份證明文件。)

Is your spouse currently maintaining Account with the companies of Guotai Junan Group?

您的配偶是否在國泰君安集團的公司開有賬戶?

- ☐ No 沒有    ☐ Yes 有 (If yes, please specify如有，請述明賬號: \_\_\_\_\_)

Are you, either alone or with your spouse, in control of 35% or more of the issued shares of any corporate client of Guotai Junan Group?

您是否個人或與您的配偶共同控制任何國泰君安集團的公司客戶35%以上的股權?

- ☐ No 沒有    ☐ Yes 有 (If yes, please specify如有，請述明賬號: \_\_\_\_\_)

☐ **Update of knowledge of derivatives 更新衍生產品的認識 (Please tick ✓ the appropriate box. 請適當空格加✓)**

1. ☐ I have attended courses or seminars on derivative product(s)  
我曾接受有關衍生產品的培訓或相關課程

Name of courses or seminars 相關培訓或課程名稱: \_\_\_\_\_

☐ Derivatives knowledge training provided by Guotai Junan group company 國泰君安集團公司提供的衍生產品課程 (Please provide the completed and signed "Derivatives Knowledge Questionnaire" 請提供已完成及簽署之「衍生產品問卷」)

☐ Other courses or seminars 其他培訓或課程

Name of courses or seminars 相關培訓或課程名稱: \_\_\_\_\_

Name of organized institution 舉辦機構名稱: \_\_\_\_\_

Attendance Date 出席日期: \_\_\_\_\_



2. ☐ My current or previous work experience has been related to derivative product(s)  
我現時或以往的工作經驗是與衍生產品有關  
Name of employer 僱主名稱: \_\_\_\_\_  
Position 職位: \_\_\_\_\_  
Job nature 工作性質: \_\_\_\_\_  
Relevant employment period 在職年期: \_\_\_\_\_ years (年)

3. ☐ I have executed six or more transactions in derivative products within the past three years  
我曾在以往三年內進行過六宗或以上衍生產品交易  
Name of the financial intermediary(ies) through which you executed the derivative product transactions  
你進行上述衍生產品交易時使用的金融機構名稱: \_\_\_\_\_  
Please indicate relevant derivative product transactions experience in “Client Risk Profiling Questionnaire”  
請在「風險承受能力問卷」填上相關衍生產品交易經驗

## (II) CHANGE OF TRADING INFORMATION 更改交易資料

(Please tick ✓ the appropriate box 請在適當空格加✓) \*Please delete as inappropriate 請刪去不適用者

**Internet Trading Function 網上交易服務：**  
☐ **Request 增加** Register of Mobile Phone No. for OTP is required for Internet Trading Function  
如增加網上交易服務，必需登記手提電話號碼以獲取“一次性驗證碼”  
☐ **Cancel 取消** Not Applicable to Virtual Assets Trading Account 不適用於持有加密貨幣交易賬戶

☐ Add first / Cancel / Change of \* Personal Identification Number ( “PIN” )  
首次新增 / 取消 / 更改\* 私人密碼 ( “PIN” )

☐ **Request/ Cancel\* Non-HK Market Trading Function 開通 / 取消\* 香港以外的其他交易市場**  
☐ Shanghai-Hong Kong Stock Connect 滬港通 (Not Applicable to Mainland Investors 不適用於內地投資者)  
☐ Shenzhen- Hong Kong Stock Connect 深港通 (Not Applicable to Mainland Investors 不適用於內地投資者)  
☐ Australian shares 澳洲股票 ☐ Bonds 債券 ☐ Canadian shares<sup>(b)</sup> 加拿大股票<sup>(b)</sup> ☐ French shares 法國股票  
☐ Funds 基金 ☐ German shares 德國股票 ☐ Japanese shares 日本股票 ☐ Korean shares 韓國股票  
☐ Malaysian shares 馬來西亞股票 ☐ Singaporean shares 新加坡股票 ☐ Swiss shares 瑞士股票 ☐ Taiwanese shares 台灣股票  
☐ UK shares 英國股票 ☐ US shares<sup>(a)</sup> 美國股票<sup>(a)</sup> ☐ Vietnam shares<sup>(c)</sup> 越南股票<sup>(c)</sup>  
☐ Structured Product 結構性產品 (Applicable to Professional Investors only 只適用於專業投資者)

☐ **Request(a)(d) / Cancel\* US Futures Trading Function 開通(a)(d) / 取消\* 美國期貨交易**  
(a) If you have never completed a W-8 declaration or the declaration has expired, Please complete and return W-8BEN/W-8BEN-E/W8-IMY IRS tax return forms  
如從未填寫W-8申報或申報已過期，請填寫並交回W-8BEN/W-8BEN-E/W8-IMY美國稅務局（IRS）稅務申報表格  
(b) Please complete and return Canadian Market Data Agreement and NR Form  
請填寫並交回加拿大市場數據協議書及NR Form  
(c) Please read carefully and understand Additional Risk Disclosures on Investing in Vietnamese Securities Market prior requesting Vietnam shares trading function  
<https://www.gtjas.com.mo/uploadfiles/files/VietnameseMarket.pdf>  
申請開通越南股票交易前，請先細閱及了解投資越南證券市場附加風險披露聲明  
<https://www.gtjas.com.mo/uploadfiles/files/VietnameseMarket.pdf>  
(d) Please complete and return Trading Platform Application and Termination. 請填寫並交回申請及終止交易平台

☐ **Change of other information 更改其他資料：**



### Personal Data 個人資料收集聲明

I/We acknowledge I/we have read and understand the content of the Personal Information Collection Statement of GUOTAI JUNAN SECURITIES (MACAU) COMPANY LIMITED ( "GTJA Macau" ), which has been provided to me/us and is posted on GTJA' s website ( www.gtjas.com.mo). By ticking the box below, I/we signify my/our consent for GTJA Macau to use my/our personal data on the terms of and for the purposes set out in the Personal Information Collection Statement. I/We further agree to any revision or amendment that GTJA Macau may from time to time make in respect of any content of the Personal Information Collection Statement by notice to me/us. 本人/吾等確認已閱讀及明白國泰君安證券(澳門)一人有限公司(國泰君安澳門)之個人資料收集聲明之內容, 該聲明已提供給本人/吾等並在國泰君安的網站( www.gtjas.com.mo)上發佈。在下列方格加上剔號, 表示本人/吾等同意國泰君安澳門按照個人資料收集聲明之條款及目的使用本人/吾等的個人資料。本人/吾等亦同意國泰君安澳門可在通知本人/吾等的情况下不時修改個人資料收集聲明之內容。

- ☐ I/We agree to GTJA Macau' s use of my/our personal data for the purposes set out in the Personal Information Collection Statement. I/We further agree to any revision or amendment that GTJA Macau may from time to time make in respect of any content of the Personal Information Collection Statement by notice to me/us. 本人/吾等同意國泰君安澳門按照個人資料收集聲明之目的使用本人/吾等的個人資料。本人/吾等亦同意國泰君安澳門可在通知本人/吾等的情况下不時修改個人資料收集聲明之內容。
- ☐ I/We agree to GTJA Macau' s use of my/our sensitive personal data for the purposes set out in the Personal Information Collection Statement. I/We further agree to any revision or amendment that GTJA Macau may from time to time make in respect of any content of the Personal Information Collection Statement by notice to me/us. 本人/吾等同意國泰君安澳門按照個人資料收集聲明之目的使用本人/吾等的敏感個人資料。本人/吾等亦同意國泰君安澳門可在通知本人/吾等的情况下不時修改個人資料收集聲明之內容。
- ☐ I/we expressly agree and acknowledge that GTJA Macau' s may transfer or disclose any information relating to me/us to group member of GTAJ, subsidiaries, representative offices, affiliates, agents and any third parties for confidential use in or outside Macau. Such transfer may constitute an international transfer in the event that the location of the recipient is outside Macau and the applicable privacy policy and protections of the jurisdiction where the recipient is located may be different from Macau. I/we also consent that GTAJ Macau may transfer or disclose such information to any person, at the request of legal, regulatory, governmental, tax, law enforcement or other authorities, securities or futures exchange, central bank, or self-regulatory or industry bodies or associations (Authorities), in accordance with any law in or outside Macau. I/We further agree to any revision or amendment that GTJA Macau may from time to time make in respect of any content of the Personal Information Collection Statement by notice to me/us. 本人/吾等明確同意國泰君安澳門按照個人資料收集聲明之目的將本人/吾等個人資料轉移及披露予國泰君安之集團成員、附屬公司、代表辦事處、附屬成員、代理人及上述各方所挑選的任何第三方, 不論在澳門境內或澳門境外, 以作出保密的用途, 且本人/吾等知悉資料接收方所處司法管轄區所適用的私隱政策及個人資料的保障可能有別於澳門。本人/吾等進一步同意國泰君安澳門可按澳門或境外之任何法律, 應澳門或任何澳門境外之司法、監督、政府、稅務、執法機構、證券或期貨交易所、中央銀行、或行業團體或組織( "權力機構" )之要求將任何該等資料轉讓及披露予任何人士。本人/吾等亦同意國泰君安澳門可在通知本人/吾等的情况下不時修改個人資料收集聲明之內容。

### Direct Marketing 直接促銷

I/We confirm my/our consent as referred to in the sections entitled Use of Personal Data in Direct Marketing and Provision of Personal Data for Use in Direct Marketing of the Personal Information Collection Statement, subject to any objection as indicated by me/us below: 除本人/吾等如下所示提出之任何反對外, 本人/吾等確認同意個人資料收集聲明內以個人資料在直接促銷中的使用及提供個人資料作直接促銷為標題之內容:

- ☐ I/We object to GTJA Macau using my/our personal data in direct marketing as referred to in the section entitled Use of Personal Data in Direct Marketing of the Personal Information Collection Statement. 本人/吾等反對國泰君安澳門按個人資料收集聲明內以個人資料在直接促銷中的使用為標題的分段所述, 將本人/吾等之個人資料作直接促銷用途。
- ☐ I/We object to GTJA Macau providing my/our personal data to GTJA Group (other than GTJA) for use in direct marketing as referred to in the section entitled Provision of Personal Data for Use in Direct Marketing of the Personal Information Collection Statement. 本人/吾等反對國泰君安澳門按個人資料收集聲明內以提供個人資料作直接促銷為標題的分段所述, 向國泰君安集團(不包括國泰君安本公司)提供本人/吾等之個人資料作直接促銷用途。

The above represents my/our present choice of whether or not to receive direct marketing contact or information. This shall replace any choice I/we may have given to GTJA previously.

以上內容代表本人/吾等目前對於是否接收直接促銷聯絡或資訊的選項。這將取代本人/吾等先前給予國泰君安的任何選項。

### Declaration & Signature 聲明及簽署

- ☐ I/We hereby declare that the information given in this form is true and correct and that I/we have not willfully withheld any material fact(s). I/We understand that I/we may be required to provide additional information or submit documentary proof as to the information provided in this form when requested to do so, and I/we further confirm that this form is completed by me/us for the purpose of complying with the Anti-Money Laundering (AML) and Combating the Financing Terrorism (CFT) Guideline regarding customer due diligence and ongoing review of customer information. 本人/吾等謹此聲明表格上提供之所有資料均為真實及正確, 本人/吾等並未刻意隱瞞任何重要事實。除上述提供的資料外, 本人/吾等清楚貴司會要求本人/吾等提供更多相關的資料或證明文件, 且本人/吾等進一步確認為遵守《反洗錢及反恐融資指引》關於客戶盡職調查及客戶資料之持續覆查等目的而填寫本表格。

Client Signature 客戶簽署		Date 日期	
For GTJA Use Only	Signature Verified	Inputted	Reviewed
Signature:			
Date:			





<b>APPENDIX A – 附錄甲</b> <b>LIST OF INDUSTRIES NO. 1 - 40</b> <b>行業列表項目 1- 40</b> <b>(updated in October 2025)</b>		
1. Accommodation and Travel Services 住宿及旅遊服務	2. Activities of Religious Organisation 宗教組織活動	3. Advertising and Market Research 廣告及市場研究
4. Arms, Defense, Military-related Entities 軍火、國防、軍事相關實體	5. Atomic Power-related Entities 原子能相關實體	6. Auction House/Pawnshop 拍賣行/當舖
7. Civil Engineering, Construction and Engineering, Architecture Engineering 土木工程、建築與工程、建築工程及相關活動	8. Crop and Animal Production, Hunting and Related Service Activities 農作物及動物養殖、狩獵及相關服務活動	9. Dual Use Goods Trader/Manufacturer - Aerospace/Marine Products and Propulsion Systems/Lasers and Sensors 雙用途商品交易商/製造商 – 航空航太/海洋產品和推進系統
10. Embassies 大使館	11. Entertainment (e.g. Casino and Gambling-related Business, Bar, Disco, Night Club etc.) 娛樂場所（如賭場和賭博相關業務、酒吧、的士高、夜總會等）	12. Financial Service Activities (including Banks, Broker and Dealers, Financial Holdings Company and Insurance and Pension Fund) 金融服務活動（含銀行、經紀商、金融控股公司保險和退休基金）
13. Food and Beverage Service Activities 餐飲服務活動	14. Healthcare and Veterinary Services 醫療保健及獸醫服務	15. Import and Export, Wholesale and Retail Trade (except High Value Items) 進出口貿易批發及零售業（除高價值物品外）
16. Information Technology Service Activities (e.g. the Provision of IT Services, Software Development and Consulting etc.) 資訊科技服務活動（如提供IT服務、軟件開發及諮詢等）	17. Legal and Accounting Activities 法律及會計活動	18. Licensed Non-Government Organization 經許可非政府組織
19. Manufacture of Daily Essentials/Household Goods (e.g. Food and Beverage, Textiles, Furniture, Electronic Equipment etc.) 民生用品的製造（如食品飲料、紡織品、傢俱、電子設備等）	20. Manufacture of Tobacco, Pharmaceuticals/Chemical/Metal Products or Transport Equipment 煙草製品/藥品/化學品/金屬製品/運輸設備的製造	21. Marijuana-related Entities 大麻相關實體
22. Mining, Extraction and Trading of Fossil Fuels, Precious Metal and Ores (e.g. Coal, Petroleum, Natural Gas, Precious Metals, and Ores etc.) 化石燃料、貴金屬與礦物的開採與貿易（如煤炭、石油、天然氣、貴金屬及礦物等）	23. Other Not Listed: Please state 其他未列出的行業：請說明	24. Personal Investment Company/Vehicle 個人投資公司/工具



25. Personal Service Activities (e.g. Laundry and Dry-cleaning Services, Beauty and Body Prettifying Treatment, Massage Services etc.) 個人服務活動（如洗滌及乾洗服務、美容及美體護理、按摩服務等）	26. Postal and Courier Activities 郵政及速遞活動	27. Public Services 公共服務
28. Purchasing Agent and Key Opinion Leader E-commerce 代購及網紅帶貨	29. Real Estate Activities 地產活動	30. Regulated Money Services Business (e.g. Money Exchange, Money Remitters, Check Cashers) 受監管的貨幣服務企業（例如：貨幣兌換、匯款或支票兌現）
31. Repair and Installation Services (e.g. Motor Vehicles, Motorcycles, Computers, Personal and Household Goods, Machinery and Equipment etc.) 維修及安裝服務（如汽車、電單車、電腦、個人及家庭用品、機械及設備等）	32. Scientific Research and Development 科學研究及發展	33. Security and Investigation Activities 保安及偵查活動
34. Shell Banks or Shell Financial Institutions 空殼銀行或空殼公司金融機構	35. Telecommunications 電訊	36. Transportation 運輸
37. Unlicensed Banks/Non-Bank Financial Institutions (including Unlicensed Money or Value Transfer Services/Money Services Businesses/Payment Service Providers) and Unlicensed and Unregulated Virtual Asset Exchange/Trading Platform Operators 無牌銀行/非銀行金融機構（包括無牌貨幣或價值轉移服務/貨幣服務企業/支付服務提供者）及無牌和非受監管虛擬資產交易所/平台營運者	38. Unregulated Charities 無監管慈善機構	39. Utilities 公用事業
40. Wholesale/Retail/Import/Export of High Value Items (e.g. Watches/Jewelry/Precious Metals, Art/Antique, Wine, Vehicles/Vessels/Aircraft etc.) 高價值物品進出口貿易/批發/零售（如鐘錶珠寶/貴金屬、藝術品/古董、酒類、汽車/船舶/飛機等）		



APPENDIX B 附錄乙			
INHERITANCE/GIFT INFORMATION (PLEASE COPY THIS PAGE TO COMPLETE IF MORE THAN 1 PERSON)			
遺產/贈物資料 (如多於1人，請複印此頁填寫)			
(Please tick ✓ the appropriate box. 請在適當空格加✓)			
<input type="checkbox"/> INHERITANCE BENEFACTOR 遺贈人		<input type="checkbox"/> GIFT DONOR 饋贈人	
<input type="checkbox"/> Mr.先生 <input type="checkbox"/> Ms.女士 <input type="checkbox"/> Mrs.夫人	Last Name (English): 英文姓:	First Name (English): 英文名:	Chinese Name: 中文姓名:
Relationship with the client/beneficial owner: 與客戶或實益擁有人之關係:		Occupation: 職業:	
Form of Inheritance/ Gift 遺產/贈物形式:			
<input type="checkbox"/> Cash 現金及儲蓄 <input type="checkbox"/> Properties 物業		<input type="checkbox"/> Securities 證券 <input type="checkbox"/> Others 其他: _____	
Value(HKD): 價值(港幣):			