

客戶資料更改表格 Customer Information Amendment Form

請用英文正楷填寫以下表格並於適當空格加上“✓”號。  
Please complete the form below in Block Letters and “✓” the appropriate box(es).

填妥表格後，本地客戶可親身交回任何一間招商永隆銀行分行處理，而海外客戶請郵寄至「香港九龍旺角彌敦道636號－招商永隆銀行客戶服務中心」〔客戶服務熱線：(852)230 95555〕。After completing form, local customer could submit the form to any branch of CMB Wing Lung Bank Limited in person for processing, overseas customer could mail the form to “CMB Wing Lung Bank Customer Contact Centre, 636 Nathan Road, Mongkok, Kowloon, Hong Kong” (Customer Service Hotline : (852)230 95555).

(A) 客戶資料 Customer Information

個人客戶/公司客戶名稱  
Customer Name of Personal / Company Account :

身份證明文件  
Identity Document :

☐ 香港身份證  
HKID Card

☐ 護照  
Passport

☐ 中國居民身份證  
People's Republic of China Resident Identity Card

☐ 商業登記證  
Business Registration Certificate

☐ 公司註冊證明書  
Certificate of Incorporation

☐ 其他 (請註明)  
Others (Please specify) :

號碼 No.:

如從未提交稅務相關資料，請填寫下列欄位。Please fill in the following tax related information if it was not provided before.

稅務居住地 Country of Residence for Tax Purpose :

註 Notes :  
作為一家金融機構，本行不應提供稅務建議。請注意，一般情況下您在某國家／司法管轄區有繳稅義務未必代表您在該國家／司法管轄區有應繳稅項。若您對當前稅務居住地狀態的定義有任何問題，請諮詢您的稅務／法律顧問或當地稅務機構。As a financial institution, we should not give tax advice. Please note that, generally, the fact that you are liable or subject to tax in a country/jurisdiction does not necessarily mean you have tax balance due in the country/jurisdiction. If you have any questions about defining your tax residency status, please consult your tax/legal adviser or local tax authority.

本人/公司現確認及聲明（請選擇全部適用方格）： I/We hereby confirm and declare that (please select all applicable boxes):

☐ 是Yes ☐ 否No 本人/公司曾在任何國家/司法管轄區犯有稅務罪行或逃稅行為或因此被定罪。I/We have committed or been convicted of tax crimes or tax evasion cases in any country/jurisdiction.

☐ 是Yes ☐ 否No 本人/公司目前正接受有關監管機構作稅務調查或稅務稽核。I am/We are currently under tax investigation or tax audit by relevant authority.

☐ 是Yes ☐ 否No 由於稅務不合規問題，本人/公司曾參與任何自願性稅務合規計劃。Due to tax non-compliance, I/we have participated in any VTC programme(s).

(註：如以上任何答案為“是”，請親身到任何一間分行更改客戶資料。 Notes: If “Yes” for any answer above, please visit our branch in person to amend customer information. )

(B) 更新客戶資料 Update Customer Information (只須填寫更改之事項 Please fill in the item(s) to be changed only)

中文姓名Name in Chinese <sup>1</sup>

英文姓氏Surname

英文名字Given / Middle Name <sup>1</sup>

只適用個人客戶 Applicable to Personal Customer

個人及公司客戶適用  
Applicable to Personal & Company Customer

國籍<sup>1</sup>  
Nationality <sup>1</sup>:

身份證明文件<sup>1</sup>  
Identity Document <sup>1</sup>:

性別  
Gender :

美國綠卡持有人  
U.S. Green Card Holder :

教育程度  
Education Level

婚姻狀況  
Marital Status

職業狀況  
Employment Status :

僱主/公司名稱  
Name of Employer / Company

工作職位  
Job Title (OCCP Code):

☐ 香港身份證 HKID Card ☐ 護照 Passport

☐ 中國居民身份證 / 港澳通行證  
People's Republic of China Resident Identity Card / Exit or Entry Permit for Travelling to and from Hong Kong and Macau

☐ 其他(請註明) Others (Please specify):

號碼 No.:

☐ 男 Male ☐ 女Female

☐ 是Yes ☐ 否 NO

☐ 小學或以下 Primary School or below ☐ 中學 Secondary School

☐ 預科/專上學院 Matriculation / Post Secondary ☐ 大學 University

☐ 碩士或以上 Postgraduate or above

☐ 未婚 Single ☐ 已婚 Married

☐ 離婚/分居 Divorced/ Separated ☐ 其他 Others:\_\_\_\_\_

☐ 全職 Full-time ☐ 退休 Retired

☐ 兼職 Part-time ☐ 主婦 Housewife

☐ 自僱 Self-employed ☐ 學生 Student

稅務居住地  
Country of Residence for Tax Purpose :

稅務編號  
TIN :

僱主/公司業務性質  
Employer / Company Line of Business :

開戶原因 (可選多於一項) Purpose of Account (Please “✓” one or more boxes as appropriate)

☐ 儲蓄 Savings (05) ☐ 個人用途 Personal Use (06) ☐ 結算/分期付款賬戶 Settlement / Instalment Account (02)

☐ 移居本港 Immigrate to HK (07) ☐ 支薪 Salary / Payroll Account (01) ☐ 投資 Investment (16)

☐ 其他 Others (請註明 please specify ) (10) :

(C) 更新聯絡資料 Update Contact Information (只須填寫更改之事項 Please only fill in the changed item(s))

電話類別  
Telephone Types

國家編碼  
Country Code

地區編碼  
Area Code

電話號碼  
Telephone No.

電話類別  
Telephone Types

國家編碼  
Country Code

地區編碼  
Area Code

電話號碼  
Telephone No.

住宅電話  
Residence Phone No. :

公司聯絡人電話  
Company Contact Person Phone No.:

手提電話 <sup>5</sup>  
Mobile Phone No.<sup>5</sup>:

公司聯絡人姓名  
Name of Company Contact Person :

公司電話  
Office Phone No. :

傳真號碼  
Fax No. :

電郵地址  
E-mail Address :

(請以此電郵地址作為本人接受招商永隆銀行所有服務通知之電郵地址(包括電子結單提示) Please use this email address to receive the notification of all services of CMB Wing Lung Bank (including e-Statement alert))

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(C)更新聯絡資料(續)Update Contact Information (Continue) (只須填寫更改之事項 Please only fill in the changed item(s))

地址類別 Address Type :

● 中文地址只適用於中國內地及台灣，其他地區必須提供英文地址。 Address in Chinese is applicable to Mainland China and Taiwan only, please provide the address in English for other countries.

● 如需更改通訊地址，請填寫(D)部份。 Please complete Part (D) to amend the correspondence address.

住宅地址<sup>3</sup>  
Residential Address<sup>3</sup>

室 Flat / Room :樓 Floor :座 Block :大廈 Building :  
街道 Street / Road :區域 District / Area :  
城市 City :國家 Country :郵編Postal Code:

公司地址<sup>3</sup>  
Office Address<sup>3</sup>

室 Flat / Room :樓 Floor :座 Block :大廈 Building :  
街道 Street / Road :區域 District / Area :  
城市 City :國家 Country :郵編Postal Code:

其他地址  
Others Address

室 Flat / Room :樓 Floor :座 Block :大廈 Building :  
街道 Street / Road :區域 District / Area :  
城市 City :國家 Country :郵編Postal Code:

刪除資料(請註明)  
Remove Record  
(please specify)

☐ 住宅電話 Residence Phone No.

☐ 公司電話 Office Phone No.

☐ 手提電話 Mobile Phone No.

☐ 傳真號碼 Fax No.

☐ 公司地址Office Address

☐ 其他地址 Other Address

(D)更新賬戶指示Instruction for Account Amendment

☐ 請以本人的以下地址作為本人(等)於實行及/或其附屬公司所開立之**所有賬戶**<sup>6</sup>的通訊地址<sup>4</sup>。  
Please update my / our correspondence address<sup>4</sup> for **all the accounts**<sup>6</sup> maintained with the Bank and/or its subsidiaries.

☐ 住宅地址 Residential Address

☐ 公司地址 Office Address

☐ 其他地址 Other Address

(聯名賬戶<sup>2</sup>適用) 請註明聯名賬戶持有者全名(Applicable to Joint name accounts<sup>2</sup>) Please state the full name of the joint name account holder(s) :  

(如需更改與不同聯名持有人的賬戶，必須分別遞交更改資料表格更改聯名賬戶之通訊地址；如需更改聯名賬戶持有人的地址，必須分別遞交更改資料表格)(Please submit separate Customer Information Amendment Form for different joint account name to update the joint name account's correspondence address only ; Please submit separate Customer Information Amendment Form for Joint name account holder)

☐ 請更新於實行及/或其附屬公司所開立之**下列賬戶**<sup>6</sup>的通訊地址<sup>4</sup> (如非更新所有賬戶)。  
Please update the correspondence address<sup>4</sup> for **the following account(s)**<sup>6</sup> maintained with the Bank and/or its subsidiaries (if you are not intended to update all the accounts).

(\* 請於適當空格加上“√”號 \* Please “√” the appropriate box(es))

個人 / 公司賬戶號碼 Personal / Company Account No. :	*住宅 *Residential	*公司 *Office	*其他 *Others	個人 / 公司賬戶號碼 Personal / Company Account No. :	*住宅 *Residential	*公司 *Office	*其他 *Others
1.				2.			
3.				4.			
5.				6.			
聯名賬戶號碼(如有) Joint Name Account No. (if any)	*住宅 *Residential	*公司 *Office	*其他 *Others	聯名賬戶號碼(如有) Joint Name Account No. (if any)	*住宅 *Residential	*公司 *Office	*其他 *Others
請註明聯名賬戶持有者全名 Please state the full name of the joint name account holder(s) : <div>(如需更改與不同聯名持有人的賬戶，必須分別遞交更改資料表格。 Please submit separate Customer Information Amendment Form for different joint account name)</div>							
1.				2.			
3.				4.			
5.				6.			

生效日期  
Effective Date :

(請預留七個工作天供本行更新記錄。)  
(Please allow seven working days for updating bank record.)

注意事項 Important Notes:

1 如須更改客戶姓名、國籍或身份證明文件資料，請提供證明文件。 If the amendment is related to customer name, nationality or identity document information, please provide documentary proof.

2 如須更改聯名賬戶通訊地址，請依照本行留存之授權簽署安排。本行只會更改取得有效授權簽署之賬戶通訊地址。 If the amendment is related to joint name accounts, please sign in accordance with the authorized signing arrangement filed with the Bank. The Bank will update the customer information with authorized signatures only.

3 郵政信箱不適用住宅及公司地址。 P.O. box is not accepted for residential and office address.

4 貸款客戶更改通訊地址請提供地址證明。如屬聯名貸款賬戶，本行只會為此表格上簽署之借款人更改通訊地址。 Loan customers requesting for correspondence address change should provide address proof. For joint name loan account, we will update the correspondence address of the borrower(s) signing this form.

5 客戶所登記之手提電話號碼亦將用以接收本行發出之短訊通知(只接受一個手提電話號碼)。 Mobile phone number registered by customer will also be used for receiving SMS alert sent by our Bank (accept one mobile phone no. only).

6 本表格不適用於香港人壽之保單、招商永隆保險顧問有限公司之保單、招商永隆保險有限公司之保單或銀聯信託有限公司之強積金賬戶。 This form is not applicable to insurance policy of Hong Kong Life Insurance Limited, insurance policy of CMB Wing Lung Insurance Brokers Limited, insurance policy with CMB Wing Lung Insurance Company Limited or MPF account with Bank Consortium Trust Company Limited.

S.V.

個人客戶 / 公司授權簽署及公司蓋章(如適用)  
Signature(s) of Personal Customer / Authorized Signature & Company Chop (if applicable)  
日期 Date : \_\_\_\_\_

S.V.

聯名戶口持有人簽署(如需聯名簽署)  
Signature(s) of Joint Name Account Holder(s) (if joint signatures are required)  
日期 Date : \_\_\_\_\_

(如上述指示更改客戶資料、新地址及/或聯絡方法之賬戶多於一個且使用不同簽字式樣者，請以各相關賬戶之原留印鑑簽署。)  
(If instruction for change of customer information, address change and/or contact details involves more than one account and different specimen signatures are being used for the accounts concerned, please sign in the same form as the signature specimen(s) of respective account(s) with the Bank and its subsidiaries.)

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