

**Account Opening Checklist for Individual / Joint Account**  
個人/ 聯名賬戶 開立賬戶核對清單

**Basic documents required 基本所需文件**

**Please Attach:**

請附上：

- Copy of Primary (and Joint) Client's ID card or passport;  
個人(及聯名) 賬戶持有人的身份證或護照副本；
- Copy of a bank statement or utility bill in the latest 3 months for proof of home address (P.O. Boxes are not accepted);  
地址證明：最近三個月的銀行結單或公共服務單據副本（郵政信箱恕不接受）；
- AEOI Self-Certification Form (Please provide the Jurisdiction of Residence and Taxpayer Identification Number)  
自動交換財務賬戶資料自我證明表格（請提供稅務管轄區及稅務編號）
- Form W-8BEN  
美國稅務表格