

(Year) **Income Statement of Beneficiary-Overseas Income**
(including income from Sources in Hong Kong and Macau)

The trust deed of the trust withholding agency is

- Charitable trust/mutual trust fund, securities investment trust fund, futures trust fund, or other trust fund approved by the Financial Supervisory Commission
 Other (Please tick in the)

Name of Trust Withholding Agency		Tax Code No. of Trust Withholding Agency							
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Instructions:

- This statement must be completed separately for each trust withholding agency.
- If the beneficiaries (including individuals and profit-seeking enterprises) have overseas income, their overseas income and taxes paid should be reported in this statement. However, if the beneficiary is an individual whose total annual overseas income does not exceed NT\$500,000, he/she may be exempt from this requirement.
- The amounts in the income categories of beneficiaries should be reported based on the overseas income derived from the trust property in the current year (including income derived from sources in Hong Kong and Macau, but excluding income derived from sources in the Mainland Area). The income should be calculated and reported according to the income category and the proportion of benefits allocated to each beneficiary. However, for charitable trusts and mutual trust funds, securities investment trust funds, futures trust funds, or other trust funds approved by the Financial Supervisory Commission, the overseas income should be reported as the distribution made to beneficiaries during the current year.
- Overseas Income Tax Paid refers to income taxes paid by domestic beneficiaries in accordance with the tax laws of the source country of the income. However, if the beneficiary has applied for a refund of the aforementioned taxes in the source country, the refunded amounts should be deducted.
- If additional space is needed, please replicate the statement.

Name of the Beneficiary	Income from Profit-Seeking Activities	Interest Income	Income from Lease and Royalties	Income from Property Transactions	Prizes or Awards Won from Skill Competitions or by Chance	Others
Tax Code No. of the Beneficiary	Overseas Income Tax Paid	Overseas Income Tax Paid	Overseas Income Tax Paid	Overseas Income Tax Paid	Overseas Income Tax Paid	Overseas Income Tax Paid
01						
02						
03						
04						
05						
06						
07						
08						
09						
10						
Total						

Copy I: For Data Entry Copy II: For Tax Jurisdiction

Date:

Statement No.	
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Receipt No.	
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