

INSTRUCTIONS

CRS Entity Self-Certification Form (CRS-E)

Please read these instructions before completing the form

Why are we asking you to complete this form?

To help protect the integrity of tax systems, governments around the world are introducing a new 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 an entity is 'tax resident' (this will usually be where you are liable to pay corporate income taxes). If you are tax resident outside the country where your account is held, we may need to give the national tax authority this information, along with information relating to your accounts. That may then be shared between different countries' 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 this CRS Entity Self-Certification Form (CRS-E)?

Business for customers (which includes all businesses, trusts and partnerships except sole traders) should complete this form.

If you are an applicant, certificate owner or a sole trader, please complete the 'Individual Tax Residency Self-Certification Form' (CRS-I). However, if you are a controlling person of an entity, please complete the 'Controlling Person Tax Residency Self-Certification Form' (CRS-CP): Part 5a/5b/5c incorporated within this Entity Self-Certification (CRS-E) form. You can find these forms at www.zurich.com.my.

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.

Please tell us in what capacity you are signing in Part 4 and Part 5a/5b/5c: Declaration and Signature. For example you may be an authorised officer of the business, authorised representative or a trustee.

Where to go for further information

If you have any questions about this form or these instructions please visit: www.zurich.com.my, contact your consultant, visit a branch or call us.

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: www.oecd.org/tax/automatic-exchange/.

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

You can find a list of definitions in the following Appendix.

Appendix - Definitions

Note: These are selected definitions provided to assist you with the completion of this form. Further details can be found within the OECD Common Reporting Standard for Automatic Exchange of Financial Account Information (the CRS'), the associated Commentary to the CRS, and domestic guidance. This can be found at the following link:
<http://www.oecd.org/tax/transparency/automaticexchangeofinformation.htm>.
If you have any questions then please contact your tax adviser or domestic tax authority.

“Account Holder” (Example: Applicant, Certificate Owner, Assignee, Claimant and Beneficiary)

The “Account Holder” is the person listed or identified as the holder of a Financial Account by the Financial Institution that maintains the account. This is regardless of whether such person is a flow-through Entity. Thus, for example, if a trust or an estate is listed as the holder or owner of a Financial Account, the trust or estate is the Account Holder, rather than the trustee or the trust’s owners or beneficiaries. Similarly, if a partnership is listed as the holder or owner of a Financial Account, the partnership is the Account Holder, rather than the partners in the partnership. A person, other than a Financial Institution, holding a Financial Account for the benefit or account of another person as agent, custodian, nominee, signatory, investment advisor, or intermediary, is not treated as holding the account, and such other person is treated as holding the account.

“Active NFE” (NFE – Non-Financial Entity / Any Entity that is not a Financial Institution)

An NFE is an Active NFE if it meets any of the criteria listed below. In summary, those criteria refer to:

- active NFEs by reason of income and assets;
- publicly traded NFEs;
- Governmental Entities, International Organisations, Central Banks, or their wholly owned Entities;
- holding NFEs that are members of a nonfinancial group;
- start-up NFEs;
- NFEs that are liquidating or emerging from bankruptcy;
- treasury centres that are members of a nonfinancial group; or
- non-profit NFEs.

An entity will be classified as Active NFE if it meets any of the following criteria:

- a) less than 50% of the NFE’s gross income for the preceding calendar year or other appropriate reporting period is passive income and less than 50% of the assets held by the NFE during the preceding calendar year or other appropriate reporting period are assets that produce or are held for the production of passive income;
- b) the stock of the NFE is regularly traded on an established securities market or the NFE is a Related Entity of an Entity the stock of which is regularly traded on an established securities market;
- c) the NFE is a Governmental Entity, an International Organisation, a Central Bank, or an Entity wholly owned by one or more of the foregoing;
- d) substantially all of the activities of the NFE consist of holding (in whole or in part) the outstanding stock of, or providing financing and services to, one or more subsidiaries that engage in trades or businesses other than the business of a Financial Institution, except that an Entity does not qualify for this status if the Entity functions (or holds itself out) as an investment fund, such as a private equity fund, venture capital fund, leveraged buyout fund, or any investment vehicle whose purpose is to acquire or fund companies and then hold interests in those companies as capital assets for investment purposes;
- e) the NFE is not yet operating a business and has no prior operating history, (a “ start-up NFE”) but is investing capital into assets with the intent to operate a business other than that of a Financial Institution, provided that

Entity Tax Residency Self – Certification Form (CRS-E)

the NFE does not qualify for this exception after the date that is 24 months after the date of the initial organisation of the NFE

- f) the NFE was not a Financial Institution in the past five years, and is in the process of liquidating its assets or is reorganising with the intent to continue or recommence operations in a business other than that of a Financial Institution;
- g) the NFE primarily engages in financing and hedging transactions with, or for, Related Entities that are not Financial Institutions, and does not provide financing or hedging services to any Entity that is not a Related Entity, provided that the group of any such Related Entities is primarily engaged in a business other than that of a Financial Institution; or
- h) the NFE meets all of the following requirements (a “non-profit NFE”) :
 - i) it is established and operated in its jurisdiction of residence exclusively for religious, charitable, scientific, artistic, cultural, athletic, or educational purposes; or it is established and operated in its jurisdiction of residence and it is a professional organisation, business league, chamber of commerce, labour organisation, agricultural or horticultural organisation, civic league or an organisation operated exclusively for the promotion of social welfare;
 - ii) it is exempt from income tax in its jurisdiction of residence;
 - iii) it has no shareholders or members who have a proprietary or beneficial interest in its income or assets;
 - iv) the applicable laws of the NFE’s jurisdiction of residence or the NFE’s formation documents do not permit any income or assets of the NFE to be distributed to, or applied for the benefit of, a private person or non-charitable Entity other than pursuant to the conduct of the NFE’s charitable activities, or as payment of reasonable compensation for services rendered, or as payment representing the fair market value of property which the NFE has purchased; and
 - v) the applicable laws of the NFE’s jurisdiction of residence or the NFE’s formation documents require that, upon the NFE’s liquidation or dissolution, all of its assets be distributed to a Governmental Entity or other non-profit organisation, or escheat to the government of the NFE’s jurisdiction of residence or any political subdivision.

Note: Certain entities (such as U.S. Territory NFFEs) may qualify for Active NFFE status under FATCA but not Active NFE status under the CRS.

“Control”

“Control” over an Entity is generally exercised by the natural person(s) who ultimately has a controlling ownership interest (typically on the basis of a certain percentage (e.g. 25%)) in the Entity. Where no natural person(s) exercises control through ownership interests, the Controlling Person(s) of the Entity will be the natural person(s) who exercises control of the Entity through other means. Where no natural person(s) is/are identified as exercising control of the Entity through ownership interests, then under the CRS the Reportable Person is deemed to be the natural person who hold the position of senior managing official.

“Controlling Person(s)”

“Controlling Persons” are the natural person(s) who exercise control over an entity. Where that entity is treated as a Passive Non-Financial Entity (“Passive NFE”) then a Financial Institution is required to determine whether or not these Controlling Persons are Reportable Persons. This definition corresponds to the term “beneficial owner” described in Recommendation 10 and the Interpretative Note on Recommendation 10 of the Financial Action Task Force Recommendations (as adopted in February 2012).

In the case of a trust, the Controlling Person(s) are the settlor(s), the trustee(s), the protector(s) (if any), the beneficiary(ies) or class(es) of beneficiaries, or any other natural person(s) exercising ultimate effective control over the trust (including through a chain of control or ownership). Under the CRS the settlor(s), the trustee(s), the protector(s) (if any), and the beneficiary(ies) or class(es) of beneficiaries, are always treated as Controlling Persons of a trust, regardless of whether or not any of them exercises control over the activities of the trust.

Where the settlor(s) of a trust is an Entity then the CRS requires Financial Institutions to also identify the Controlling Persons of the settlor(s) and when required report them as Controlling Persons of the trust.

Entity Tax Residency Self – Certification Form (CRS-E)

In the case of a legal arrangement other than a trust, “Controlling Person(s) means persons in equivalent or similar positions.

“Custodial Institution”

The term “Custodial Institution” means any Entity that holds, as a substantial portion of its business, Financial Assets for the account of others. This is where the Entity’s gross income attributable to the holding of Financial Assets and related financial services equals or exceeds 20% of the Entity’s gross income during the shorter of: (i) the three-year period that ends on 31 December (or the final day of a non-calendar year accounting period) prior to the year in which the determination is being made; or (ii) the period during which the Entity has been in existence.

“Depository Institution”

The term “Depository Institution” means any Entity that accepts deposits in the ordinary course of a banking or similar business.

“Entity”

The term “Entity” means a legal person or a legal arrangement, such as a corporation, organisation, partnership, trust or foundation. This term covers any person other than an individual (i.e. a natural person).

“FATCA”

FATCA stands for the U.S. provisions commonly known as the Foreign Account Tax Compliance Act, which were enacted into U.S. law as part of the Hiring Incentives to Restore Employment (HIRE) Act on March 18, 2010. FATCA creates a new information reporting and withholding regime for payments made to certain non-U.S. financial institutions and other non-U.S. entities.

“Financial Institution”

The term “Financial Institution” means a “Custodial Institution”, a “Depository Institution”, an “Investment Entity”, or a “Specified Insurance Company”. Please see the relevant domestic guidance and the CRS for further classification definitions that apply to Financial Institutions.

“Investment Entity”

The term “Investment Entity” includes two types of Entities:

(i) an Entity that primarily conducts as a business one or more of the following activities or operations for or on behalf of a customer:

- Trading in money market instruments (cheques, bills, certificates of deposit, derivatives, etc.); foreign exchange; exchange, interest rate and index instruments; transferable securities; or commodity futures trading;
- Individual and collective portfolio management; or
- Otherwise investing, administering, or managing Financial Assets or money on behalf of other persons.

Such activities or operations do not include rendering non-binding investment advice to a customer.

(ii) “The second type of “Investment Entity” (“Investment Entity managed by another Financial Institution”) is any Entity the gross income of which is primarily attributable to investing, reinvesting, or trading in Financial Assets where the Entity is managed by another Entity that is a Depository Institution, a Custodial Institution, a Specified Insurance Company, or the first type of Investment Entity.

“Investment Entity located in a Non-Participating Jurisdiction and managed by another Financial Institution”

The term “Investment Entity located in a Non-Participating Jurisdiction and managed by another Financial Institution” means any Entity the gross income of which is primarily attributable to investing, reinvesting, or trading in Financial Assets if the Entity is (i) managed by a Financial Institution and (ii) not a Participating Jurisdiction Financial Institution.

“Investment Entity managed by another Financial Institution”

“An Entity is “managed by” another Entity if the managing Entity performs, either directly or through another service provider on behalf of the managed Entity, any of the activities or operations described in clause (i) above in the definition of ‘Investment Entity’.

An Entity only manages another Entity if it has discretionary authority to manage the other Entity’s assets (either in whole or part). Where an Entity is managed by a mix of Financial Institutions, NFEs or individuals, the Entity is considered to be managed by another Entity that is a Depository Institution, a Custodial Institution, a Specified Insurance Company, or the first type of Investment Entity, if any of the managing Entities is such another Entity.

“Non-Reporting Financial Institution”

A Non-Reporting Financial Institution” means any Financial Institution that is:

- a Governmental Entity, International Organisation or Central Bank, other than with respect to a payment that is derived from an obligation held in connection with a commercial financial activity of a type engaged in by a Specified Insurance Company, Custodial Institution, or Depository Institution;
- a Broad Participation Retirement Fund; a Narrow Participation Retirement Fund; a Pension Fund of a Governmental Entity, International Organisation or Central Bank; or a Qualified Credit Card Issuer;
- an Exempt Collective Investment Vehicle; or
- a Trustee-Documented Trust: a trust where the trustee of the trust is a Reporting Financial Institution and reports all information required to be reported with respect to all Reportable Accounts of the trust; any other defined in a countries domestic law as a Non-Reporting Financial Institution.

“Participating Jurisdiction”

A “Participating Jurisdiction” means a jurisdiction with which an agreement is in place pursuant to which it will provide the information required on the automatic exchange of financial account information set out in the Common Reporting Standard and that is identified in a published list.

“Participating Jurisdiction Financial Institution”

The term “Participating Jurisdiction Financial Institution means (i) any Financial Institution that is tax resident in a Participating Jurisdiction, but excludes any branch of that Financial Institution that is located outside of that jurisdiction, and (ii) any branch of a Financial Institution that is not tax resident in a Participating Jurisdiction, if that branch is located in such Participating Jurisdiction.

“Passive NFE” (NFE – Non-Financial Entity / Any Entity that is not a Financial Institution)

Under the CRS a “Passive NFE” means any NFE that is not an Active NFE. An Investment Entity located in a Non-Participating Jurisdiction and managed by another Financial Institution is also treated as a Passive NFE for purposes of the CRS.

“Related Entity”

An Entity is a “Related Entity” of another Entity if either Entity controls the other Entity, or the two Entities are under common control. For this purpose control includes direct or indirect ownership of more than 50% of the vote and value in an Entity.

“Reportable Account”

The term “Reportable Account” means an account held by one or more Reportable Persons or by a Passive NFE with one or more Controlling Persons that is a Reportable Person.

“Reportable Jurisdiction”

A Reportable Jurisdiction is a jurisdiction with which an obligation to provide financial account information is in place and that is identified in a published list.

“Reportable Jurisdiction Person”

A Reportable Jurisdiction Person is an Entity that is tax resident in a Reportable Jurisdiction(s) under the tax laws of such jurisdiction(s) - by reference to local laws in the country where the Entity is established, incorporated or managed. An Entity such as a partnership, limited liability partnership or similar legal arrangement that has no residence for tax purposes shall be treated as resident in the jurisdiction in which its place of effective management is situated. As such if an Entity certifies that it has no residence for tax purposes it should complete the form stating the address of its principal office.

Dual resident Entities may rely on the tiebreaker rules contained in tax conventions (if applicable) to determine their residence for tax purposes.

“Reportable Person”

A “Reportable Person” is defined as a “Reportable Jurisdiction Person”, other than:

- a corporation the stock of which is regularly traded on one or more established securities markets;
- any corporation that is a Related Entity of a corporation described in clause (i);
- a Governmental Entity;
- an International Organisation;
- a Central Bank; or
- a Financial Institution (except for an Investment Entity described in Sub Paragraph A(6) b) of the CRS that are not Participating Jurisdiction Financial Institutions. Instead, such Investment Entities are treated as Passive NFE's.)

“Resident for tax purposes”

Each jurisdiction has its own rules for defining tax residence, and jurisdictions have provided information on how to determine whether an entity is tax resident in the jurisdiction on the OECD automatic exchange of information portal. Generally, an Entity will be resident for tax purposes in a jurisdiction if, under the laws of that jurisdiction (including tax conventions), it pays or should be paying tax therein by reason of his domicile, residence, place of management or incorporation, or any other criterion of a similar nature, and not only from sources in that jurisdiction. Dual resident Entities may rely on the tiebreaker rules contained in tax conventions (if applicable) to solve cases of double residence for determining their residence for tax purposes. An Entity such as a partnership, limited liability partnership or similar legal arrangement that has no residence for tax purposes shall be treated as resident in the jurisdiction in which its place of effective management is situated. For additional information on tax residence, please talk to your tax adviser or see the OECD automatic exchange of information portal.

“TIN” (including “functional equivalent”)

The term “TIN” means Taxpayer Identification Number or a functional equivalent in the absence of a TIN. A TIN is a unique combination of letters or numbers assigned by a jurisdiction to an individual or an Entity and used to identify the individual or Entity for the purposes of administering the tax laws of such jurisdiction. Further details of acceptable TINs can be found at the OECD automatic exchange of information portal. Some jurisdictions do not issue a TIN. However, these jurisdictions often utilise some other high integrity number with an equivalent level of identification (a “functional equivalent”). Examples of that type of number include, for Entities, a Business/company registration code/number.



Please complete Parts 1-5 in BLOCK LETTERS

Entity Self-Certification Form

Part 1 Identification of Accountholder

Certificate No:

A. Legal Name of Entity

B. Country of Incorporation or organisation

C. Type of business

D. Is the legal entity tax resident outside of Malaysia

Yes

No

If **Yes**, please continue with **Part 2**.

If **No**, please continue with **Part 3**.

E. Residence Address other than stated in the Takaful Application form:

Line 1 House/Apt/Suite
Name, Number, Street

Line 2 Town/City
Province/Country/ State

Country

Postal Code / ZIP code

F. Mailing Address (please only complete if different from the address shown in Section B above)

Line 1 House/Apt/Suite
Name, Number, Street

Line 2 Town/City
Province/Country/ State

Country

Postal Code/ ZIP code

Part 2 Entity - Country of Residence for Tax Purposes and related Taxpayer Identification Number or functional equivalent (“TIN”)

Please complete the following table indicating (i) where the Legal Entity is tax resident and (ii) the Legal Entity’s TIN for each country/reportable jurisdiction indicated.

If the Legal Entity is not tax resident in any jurisdiction (e.g. because it is fiscally transparent), please indicate and provide its place of effective management or jurisdiction in which its principal office is located.

If the Legal Entity is tax resident in more than three countries please use a separate sheet. If a TIN is unavailable please provide reason A, B or C where appropriate:

Reason A - The country/jurisdiction where the Legal Entity liable to pay tax does not issue TINs to its tax residents

Reason B – The Legal Entity is otherwise unable to obtain a TIN or equivalent number
(Please explain why you are unable to obtain a TIN in the below table if you have selected this reason)

Reason C - No TIN is required. (Note: Only select this reason if the authorities of the country of tax residence entered below do not require the TIN to be disclosed)

Country of tax residence	TIN	If no TIN available enter Reason A, B or C
1		
2		
3		

Please explain in the following boxes why you are unable to obtain a TIN if you selected Reason B above.

1	
2	
3	

If the Legal Entity is not a tax resident in any Country/Jurisdiction, please provide its place of effective management or the country in which its principal office is located.

Part 3 Entity Type: Please provide the Accountholder’s Status by ticking one of the following boxes.

a) Is the legal entity a Financial Institution (e.g. bank)? Yes No

If **Yes**,

- Please indicate the type of the Financial Institution (e.g., Custodial or Depository Institution, Investment Entity, or Trust that is managed by another Investment Entity or FI)
Financial Institution type: _____
- Please provide either: Global Intermediary Identification Number (“GIIN”): _____
- Please sign and date this self-certification. (**Part 4**)

If **No**, please go to question 3b).

b) Is the legal entity a Passive Non-Financial Entity (NFE) Yes No

A legal entity is a Passive NFE if it generates more than 50% of its gross income through holding assets for the preceding calendar year (or other appropriate reporting period) or more than 50% of its assets generate or are held for the generation of passive income during the preceding calendar year (or other appropriate reporting period), unless it is a financial institution (see question 3a) or a publically traded company (or related entity of a publically traded company).

If **Yes**, go to question 3c).

If **No**, please sign and date this self-certification. (**Part 4**) -The entity will be considered an Active NFE

c) Does the Passive NFE have one or more controlling person(s)? Yes No

A controlling person is a person having at least [25%] interest (financial or control) in the Passive NFE.

If **Yes**, go to question 3d).

If **No**, please sign and date this self-certification. (**Part 4**)

d) Is one or more controlling person(s) tax resident outside of Malaysia or a U.S. citizen or US Resident / Taxpayer? Yes No

If **Yes**, go to **Part 5a**.

If **No**, please sign and date this self-certification. (**Part 4**)

Part 4 Declarations and Signature

I acknowledge that the information contained in this form and information regarding my account may be reported to the tax authorities of the country in which this account is maintained and exchanged with tax authorities of another country or countries in which I am tax resident.

I declare that all statements made in this declaration are, to the best of my knowledge and belief, correct and complete. I agree that I will submit a new form within [max 90] days if any certification on this form becomes incorrect.

Signature	Name	Capacity	Date

Note: If you are not the Account Holder please indicate the capacity in which you are signing the form (e.g. Authorised Officer). If signing under a power of attorney please also attach a certified copy of the power of attorney.

Part 5a Controlling Person tax residency self-certification form (CRS-CP)

A. Name of Controlling Person:

B. Residence Address :

Line 1 House/Apt/Suite
Name, Number, Street

Line 2 Town/City
Province/Country/ State

Country

Postal Code / ZIP code

C. Mailing Address : (please only complete if different from the address shown in Section B above)

Line 1 House/Apt/Suite
Name, Number, Street

Line 2 Town/City
Province/Country/ State

Country

Postal Code / ZIP code

D. Date of birth

D	D	M	M	Y	Y	Y	Y
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E. Place of birth

Town or City of Birth

Country of Birth

F. Tax Residency (Please tick) :

- (i) Are you a Malaysian Resident for Tax Purposes?
- (ii) Are you a United States Citizen or United States Resident/ Taxpayer?
- (iii) Are you a Residents for Tax Purpose/ Taxpayer of any country other than Malaysia and United States?

Part 5a Controlling Person - Country of Residence for Tax Purposes and related Taxpayer Identification Number or functional equivalent (“TIN”)

Please complete the following table indicating (i) where the Controlling Person is tax resident and (ii) the Controlling Person’s TIN for each country indicated.

If the Controlling Person is tax resident in more than three countries please use a separate sheet. If a TIN is unavailable please provide the appropriate reason A, B or C where appropriate:

Reason A - The country where I am (Controlling Person) liable to pay tax does not issue TINs to its tax residents.

Reason B - The Controlling Person is otherwise unable to obtain a TIN or equivalent number
(Please explain why you are unable to obtain a TIN in the below table if you have selected this reason)

Reason C - No TIN is required. (Note. Only select this reason if the authorities of the country of tax residence entered below do not require the TIN to be disclosed)

	Country of tax residence	TIN	If no TIN available enter Reason A, B or C
1			
2			
3			

Please explain in the following boxes why you are unable to obtain a TIN if you selected Reason B above.

1	
2	
3	

Part 5a Type of Controlling Person

Please provide the Controlling Person’s Status by ticking the appropriate box.

Controlling Person of legal person - control by ownership	
Controlling Person of legal person - control by other means	
Controlling Person of legal person - senior managing official	
Controlling Person of legal arrangement - trust - settlor	
Controlling Person of legal arrangement - trust - trustee	
Controlling Person of legal arrangement - trust - protector	
Controlling Person of legal arrangement - trust - beneficiary	
Controlling Person of legal arrangement - trust - other	
Controlling Person of legal arrangement - other - settlor-equivalent	
Controlling Person of legal arrangement - other - trustee-equivalent	
Controlling Person of legal arrangement - other - protector-equivalent	
Controlling Person of legal arrangement - other - beneficiary-equivalent	
Controlling Person of legal arrangement - other - other-equivalent	

Part 5a Personal Data Protection Declaration

I/We understand and agree that by signing up for any products offered by Zurich Takaful Malaysia Berhad ("the Company"), interacting with the Company and submitting my/our information to the Company, I/we have consented on the collection, processing, using and sharing of my/our personal data including my/our sensitive personal data by and for the Company.

I/We understand and agree that the personal data provided may be used, processed and disclosed by the Company to individuals/organization related to and associated with the Company or any appointed third party (within or outside of Malaysia, including reinsurance, claims investigation companies and industry associations and federations) for the obligatory purposes of processing this application and providing subsequent service for this product and/or communicate with me/us for such purposes; as described in the Company's Personal Data Protection Notice published at <https://www.zurich.com.my/en/customer-hub/show-me-more-info/personal-data-protection-notice>.

I/We understand that I/we have the right to access, update, change or opt-out my/our personal data held by the Company concerning me/us. Such requests can be made through forms which can be downloaded at the Company's website or in writing at the Company's nearest branches.

I/We understand that inquiries or complaints (such as limiting the processing of certain information, including the withdrawal of consent to receive marketing information) can be made by contacting the Company's Customer Care Officer at 1-300-888-622, or by visiting/writing to the Company at CallCentre@zurich.com.my.

I/We understand that the Company's Personal Data Protection Notice may be updated from time to time in line with the requirement set forth in the Personal Data Protection Act 2010 and Personal Data Protection Code of Conduct for Insurance Industry and the updated Personal Data Protection Notice is being published at the Company's website.

Part 5a Declarations and Signature

I acknowledge that the information contained in this form and information regarding my account may be reported to the tax authorities of the country in which this account is maintained and exchanged with tax authorities of another country or countries in which I am tax resident.

I declare that all statements made in this declaration are, to the best of my knowledge and belief, correct and complete. I agree that I will submit a new form within [max 90] days if any certification on this form becomes incorrect.

Signature	Name	Capacity	Date

Note: Please indicate the capacity in which you are signing the form. If signing under a power of attorney please also attach a certified copy of the power of attorney. If more than 1 Controlling Person, please print and complete the additional Controlling Person declaration form.