

# Automatic Exchange of Information

## Self-certification for individuals

Automatic Exchange of Information (AEOI) is a standard through which tax authorities in different countries can routinely exchange information about financial accounts held by taxpayers. The standards include, but are not limited to, Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS). Financial institutions must identify and report any account holders who are taxpayers in other countries in accordance with the AEOI agreements.

Please complete the form in **FULL** and in **CAPITAL** letters and return it (by post or email) to your local Zurich office. We may need to contact you for further information but if you do not hear from us after sending us the form you can assume that we have all the information needed. If you supply information that differs from that which is already recorded we will take this as your instruction to update our files.

### Policy details

Policy number
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Title  Mr  Mrs  Miss  Ms  Dr  Other (*please give details*)

Family name

Forename(s)

Date of birth

Country of birth

Place of birth (town or city)

Nationality

Do you hold nationality in another country?

Yes  No

If 'Yes', please confirm the country

Current residential address

Current correspondence address if different

If the country of residency and correspondence differ, an explanation must be provided.

Home telephone number (include international country code)

Country of telephone number

Mobile telephone number (include international country code)

Country of telephone number

If any of the telephone numbers are outside the country of residency, an explanation must be provided.

Are you a US\* tax payer?

Yes  No

Are you a US\* citizen?

Yes  No

\*The definition of US includes the 50 United States of America, the District of Columbia, Guam, Puerto Rico, US Virgin Islands, American Samoa and the Northern Mariana Islands.

US Tax Payers Tax Identification Number.

## Policy details (continued)

Please complete the following table indicating:

- (i) where you are a tax resident;
- (ii) your Tax reference number for each country indicated.

If you are tax resident in more than three countries please use a separate sheet

If a Tax reference number is not available please provide a functional equivalent (such as your social security, national insurance, citizen, personal identification or a resident registration number).

**If you cannot provide a Tax reference number, or functional equivalent please provide appropriate reason A or B.**

**Reason A** The country where the Account Holder is tax resident does not issue a Tax reference number

**Reason B** The Account Holder is otherwise unable to obtain a Tax reference number or equivalent number

Country of tax residence	Tax reference number	If no Tax reference or functional equivalent is available, enter Reason <b>A</b> or <b>B</b>
1.		
2.		
3.		

If **Reason B** is selected, please explain why you are unable to obtain a Tax Reference number or functional equivalent, in the box below.

1.
2.
3.

I confirm that the information contained in this form including information regarding my account, may be reported to the tax authorities of the country in which this account is maintained, and may be exchanged with the 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 if any information on this form becomes incorrect.

Signature
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Date 

D	D	M	M	Y	Y	Y	Y
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Print name

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