

Tax residency declaration - United Arab Emirates

Self-certification for individuals

Completing this form

Who should complete this form?

Please complete this form if you have a UAE residence visa issued for 5 years or more and your application or policy (investment linked) was issued in the UAE. This form is required when applying for a new policy and when requesting to make changes or take withdrawals from the policy.

Why should you complete this form?

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 note, further information regarding your tax obligations may be required before your transaction can be completed. This is to ensure that Zurich fulfils its reporting obligations to the UAE Tax Authorities. To reduce the likelihood of your transaction being delayed please ensure that you complete the tax information sections in full.

Please write clearly in CAPITAL letters and complete the form in English.

Application/Policy number

Policy owner/Applicant details

Title Mr Mrs Ms Other (please specify)

First name Last name

Please provide a certified copy of your valid UAE residence visa.

Tax residence information

- Did you obtain UAE residency under a residence by investment scheme? Yes No
- Are you a resident of another country where you are required to pay taxes? Yes No

If 'Yes', in which country have you been subject to personal income tax during the previous calendar year?

Country/Countries of tax residence	Tax reference number(s)**

**If you are currently tax resident in the United Kingdom, please provide your National Insurance number.

Privacy notice

The personal information requested in this form is collected and used by Zurich International Life Limited (the Company) as Data Controller in line with the Data Protection Policy. Full details can be found online at www.zurichinternational.com/en/zurich-international-life/about-us/privacy.

Declaration

I declare that the answers given, whether in my handwriting or not, are true and complete to the best of my knowledge and belief.

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 the account is maintained, and may be exchanged with the tax authorities of another country or countries in which I am tax resident.

I agree that I will submit a new form if any of the information on this form becomes incorrect.

I understand that in the event that the information supplied is identified as inaccurate or incorrect, it will be reportable by Zurich to the relevant authorities and may result in penalties being applied to me.

Policy owner/Applicant signature

Signature

Date

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