

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 this form in English using **CAPITAL** letters and email to: corporate.pensions@zurich.com.

Policy details

Policy number (if known)

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

Family name

Forename(s)

Date of birth

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

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

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.

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	Reason A or 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

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Print name

Zurich International Life Limited, Bahrain Branch, which is registered in Bahrain under Commercial Registration No. 17444 and is licensed as an Overseas Insurance Firm – Life Insurance by the Central Bank of Bahrain.

Branch offices: 27th Floor, Almoayyed Tower, Seef District, Kingdom of Bahrain.
Telephone +973 1756 3322.

Zurich International Life Limited, UAE Branch, which is registered (Registration No. 63) under UAE Federal Law Number 6 of 2007, and its activities in the UAE governed by such law.

Registered offices at Unit 601, Building 6, Emaar Square, Dubai. (PO Box 50389 Dubai)
Telephone: +971 4 425 2300 www.zurich.ae

Zurich International Life Limited, Qatar Branch, which is authorised by the Qatar Financial Centre Regulatory Authority.

Branch offices: Office No. 404, 4th Floor, Qatar Financial Centre Tower, West Bay, Doha, Qatar.
Telephone: + 974 4428 6322.

Zurich International Life Limited provides life assurance, investment and protection products and is authorised by the Isle of Man Financial Services Authority.

Registered in the Isle of Man number 020126C.

Registered office: Zurich House, Isle of Man Business Park, Douglas, Isle of Man, IM2 2QZ British Isles.
Telephone +44 1624 662266 Telefax +44 1624 662038 www.zurichinternational.com