

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

Title	☐ Mr	☐ Mrs	☐ Miss	☐ Ms	☐ Dr	☐ Other (<i>please give details</i>)	
-------	-----------------------------	------------------------------	-------------------------------	-----------------------------	-----------------------------	---	--

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

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 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 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.

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

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

Zurich International Life is a business name of Zurich International Life Limited (a company incorporated in the Isle of Man with limited liability) which 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 20126C.

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

