

Declaration Automatic Exchange of Information and FATCA

Contract no. _____

Policyholder's personal data

Last name, first name _____

Street, no. _____

Postcode, place _____

Date of birth _____

Self-disclosure of tax domicile for common reporting standard AEOI and FATCA ¹

Two explanations must be given.

1. Automatic exchange of information AEOI

→ Please tick as appropriate ←

☐

I am exclusively resident in Switzerland for tax purposes

Please enter your AHV no.: 756.

You will find this information on your AHV insurance card or health insurance card, for example.

or

☐

I am a tax resident of the following country or countries (please complete table)

Country of residence for tax purposes	Tax identification number (TIN)



2. Foreign Account Tax Compliance Act (FATCA)

→ Please tick as appropriate ←

I hereby confirm that:

☐ I do **not** have FATCA status as a U.S. person

or

☐ I have FATCA status as a U.S. person

If U.S. person please complete

U.S. taxpayer identification number (TIN):

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Unless the following instructions are issued, Swiss Life will convey data pertaining to my contractual relationship to the US tax authorities IRS.

☐ I do not grant my consent to the normal reporting process to the IRS. In this case, data pertaining to my contractual relationship will be transmitted anonymously to the IRS. I hereby acknowledge that the IRS has the right in such an event to request information about me and the contracts in my name with Swiss Life as part of group requests. The IRS has this right by law in the case of non-cooperative contracting parties. Contracting parties and entitled persons are also deemed to be non-cooperative if they are US persons but do not disclose their TIN.

If you are in doubt as to your tax residence, we recommend that you consult a tax advisor.

I hereby acknowledge that the explanations submitted regarding the country(ies) of tax residence and taxpayer identification number(s), together with my personal data, amount in their entirety to self-certification within the meaning of the AEOI Act² and that I am obliged under this Act to provide complete and accurate information and to notify Swiss Life fully and accurately of any change in my circumstances.

Furthermore, the declaration submitted on tax information for Switzerland constitutes self-certification within the meaning of the VStG³.

¹ Further general information on this subject can be found on our website (www.swisslife.ch/en/home.html) under the heading "International tax issues".

² Federal Act on the International Automatic Exchange of Information in Tax Matters.

³ Federal Law on Withholding Tax.

Place, date

Signature policyholder

