



## 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 <sup>1</sup>**

**Two explanations must be given.**

**1. Automatic exchange of information AEOI**

→ Please tick as appropriate ←

- I am exclusively resident in Switzerland for tax purposes
- 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):     -   -

I hereby authorise Swiss Life Ltd to transfer data pertaining to my contract relationship to the U.S. tax authorities IRS:

- Yes
- No

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 Act<sup>2</sup> 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.

<sup>1</sup> For additional information on the subject, see [www.sif.admin.ch](http://www.sif.admin.ch)".

<sup>2</sup> Federal Act on the International Automatic Exchange of Information in Tax Matters.

Place, date

Signature policyholder

