



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
- 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 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.

¹ For additional information on the subject, see www.sif.admin.ch".

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

Place, date

Signature policyholder

