

# Automatic Exchange of Information – Individual Self-Certification

## Instructions for completion

Under tax regulations and intergovernmental agreements entered into by the relevant competent tax authority in relation to the Automatic Exchange of Information for tax matters (collectively “AEOI”), Friends Provident International is required to collect information about each owner/controlling person’s tax status.

Please complete all sections of this form.

Please note that in certain circumstances the information you provide may be disclosed to the relevant competent tax authority who in turn may exchange this information with tax authorities in other jurisdictions.

If any of the information that you provide changes in the future, you must advise us of these changes by completing a new Individual Self-Certification form.

If you are unsure how to complete this form, please contact your financial adviser or contact us on +44 (0)1624 821 212.

When you have completed this form, please send your Self Certification to us by email, fax or post.

- Scan and email to [aeoi@fpiom.com](mailto:aeoi@fpiom.com)
- Fax to +44 (0)1624 824 405
- Post to: Friends Provident International, Royal Court, Castletown, Isle of Man, British Isles, IM9 1RA.

## 01. Owner/Trustee/Controlling Person information

Friends Provident International  
policy number

Your full name

Your role(s)/relationship(s)  
on the policy

e.g. are you an individual/joint owner, a trustee or controlling person? Please refer to our Automatic Exchange of Information (AEOI) definitions for further information.

Date of birth (dd/mm/yyyy)

Residential address

Mailing address  
(if different from above)

Email address

Country of birth

## 02. Declaration of Tax Residency

I hereby confirm that I am a tax resident in the following countries. (Please state all countries in which you are tax resident along with your tax identification number). If you do not pay tax, you will still be required to provide a reference number that is unique to you and has been issued by the local government or tax authorities.

Country/countries of tax residency	Taxpayer Identification Number (TIN) or functional equivalent (e.g. Social Security, National Insurance, personal identification, resident card number.)	Reference Number Type (e.g. TIN, Social Security Number, Resident Number, National Insurance Number)

If you are unable to provide a Taxpayer Identification Number or functional equivalent, you must specify your reason(s) here:

## 03. Declaration of US Citizenship or US Residence for Tax purposes

Specified US Person means a US citizen or tax resident individual who has a US residential/correspondence address or who either holds a US Passport, a US Green Card or who was born in the US and has not yet renounced their US citizenship.

More information on US FATCA (Foreign Account Tax Compliance Act) can be found at <https://www.irs.gov/businesses/corporations/foreign-account-tax-compliance-act-fatca>.

Please tick the appropriate box below:

- a) ☐ Based on the definition above, I can confirm that I am not a Specified US Person
- b) ☐ I confirm that I am a Specified US Person and my Individual Taxpayer Identification Number (ITIN) is

If you are unable to provide an ITIN, you may provide your US Social Security Number (SSN) instead.

- c) ☐ I confirm I was born in the USA (or US territory) but I am no longer deemed a US Citizen as I have voluntarily surrendered my citizenship and evidence this with the attached documents.
- d) ☐ I can confirm that I am currently renouncing my US Citizenship. I evidence this with a certified copy of my Certificate of Loss of Nationality (Form DS-4083) and/or a certified copy of my passport from the country that I have obtained new citizenship.

#### 04. Declaration and Signature

I declare that all the information provided in this Individual Self-Certification form is, to the best of my knowledge and belief, correct and complete.

I understand that I must complete a new Individual Self-Certification form where the information stated on this form is no longer valid due to a change in my tax status.

I am aware that Friends Provident International may be required to share this information with the relevant competent tax authority.

Signature

Date (dd/mm/yyyy)

The term "tax regulations" refers to regulations created that enable Automatic Exchange of Information (AEOI). This includes the Foreign Account Tax Compliance Act (FATCA), various agreements entered into between the UK, the Crown Dependencies and the Overseas Territories as well as the OECD's Common Reporting Standard (CRS) for Automatic Exchange of Financial Account Information. Such agreements have been adopted between International Governments with the aim to improve International Tax Compliance.

#### Privacy policy

Our full privacy policy can be viewed at <https://www.fpinternational.com/legal/privacy-and-cookies> or can be obtained by requesting a copy from our Data Protection Officer.

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