

International Tax Compliance

Self-certification for an individual

We're required by UK law to ask for information about your tax residency. This is linked to international agreements that provide a means of sharing tax information and a global strategy to avoid tax evasion.

If appropriate, this information is shared under Foreign Account Tax Compliance Act (FATCA) and the Organisation for Economic Co-operation and Development (OECD)'s Common Reporting Standard (CRS) in order to provide for the automatic exchange of information.

As part of FATCA and CRS, countries obtain financial information from local financial institutions and automatically exchange this information with other tax authorities annually.

To help us collect this information, we need you to complete the questions below and return this form to us. If you've any questions on how to complete it, we recommend you speak to your tax or legal adviser.

Plan number

Plan holder/Applicant name

Are you a Court Deputy?

Yes ☐

No ☐

If yes, you don't need to complete the rest of the form. You will, however, still need to sign and return the form to us.

Permanent residential address

Post code

Country

Date of birth

D	D	M	M	Y	Y	Y	Y
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Are you a US Citizen?

Yes ☐

No ☐

Please include all countries in which you're tax resident, including the UK if applicable, together with any Tax Reference number(s)/Tax Identification Number(s) ("TIN"), if relevant.

Country/countries of tax residency

Tax Identification Numbers (TIN) (if UK, please supply your national insurance number)

Declaration

I declare the information provided in this form is accurate and complete, to the best of my knowledge and belief.

Signature

Name

Date

D	D	M	M	Y	Y	Y	Y
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