

## Foreign Account Tax Compliance Act (FATCA) and OECD Common Reporting Standard (CRS) Tax Certification Individuals Self-Certification

Application / Policy Number	
Policy Owner	ID Card No

We are obliged under Regulation 123.127 entitled "cooperation with other jurisdiction on tax matters" to collect certain information about each policy owner's tax arrangements. Please complete the sections below as directed and provided.

Please note that if your citizenship or your tax residence are not Maltese, MAPFRE MSV Life plc (MAPFRE MSV) may be legally obliged to pass on your details and other financial information with respect to all policies held with MAPFRE MSV to the Inland Revenue and they may exchange this information with tax authorities of another jurisdiction(s) pursuant to intergovernmental agreements to exchange financial account information.

If any of the information below about your residence or FATCA/CRS Classification changes in the future, you are obliged to advise of these changes promptly. For more information on FATCA & CRS you can access MAPFRE MSV's website.

**IMPORTANT NOTE** Please complete all sections below, you are kindly requested to answer each question and clearly provide additional information where necessary and when you have answered "Yes" to any of the questions. Failure to supply full details will cause unnecessary delays.

### Personal Data - Policy Owner

Place of Birth	<input style="width: 100%;" type="text"/>	Date of Birth	<input style="width: 100%;" type="text"/>	Nationality	<input style="width: 100%;" type="text"/>
Dual Nationality	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	Other Nationality	

### Tax Identification

Each jurisdiction has its own rules for defining tax residence. In general, you may find that tax residence is the country/jurisdiction in which you live. Special circumstances may cause you to be resident elsewhere or resident in more than one country/jurisdiction at the same time (dual residency).

For more information on FATCA and CRS please refer to Inland Revenue Malta website, the OECD CRS portal or consult your tax adviser.

Please complete the following table indicating (i) where the Policy Owner is tax resident and (ii) the Policy Holder's TIN for each country/jurisdiction indicated. If one of your tax residences is Malta, your Maltese TIN is your I.D. Card Number.

If the Policy Owner is tax resident in more than three countries/jurisdictions, please use a separate sheet.

If a TIN is unavailable, please provide the appropriate reason A, B or C where indicated below:

- Reason A – The country/jurisdiction where the Policy Owner is resident does not issue TINs to its residents
- Reason B – The Policy Owner is otherwise unable to obtain a TIN or equivalent number (please explain why if you have selected this reason)
- Reason C – No TIN is required (NB. Only select this reason if the domestic law of the relevant jurisdiction does not require the collection of the TIN issued by such jurisdiction)

Country/Jurisdiction of tax residence	TIN	If no TIN available, enter reason A, B or C
1		
2		
3		

Please Explain in the following boxes why you are unable to obtain a TIN if you selected Reason B above.

1	
2	
3	

### Contact Details

#### Permanent Address - Policy Owner

	Postcode
Country	

	<b>+ Country Code</b>
Telephone 1	<input style="width: 50%;" type="text"/> <input style="width: 50%;" type="text"/>
Telephone 2	<input style="width: 50%;" type="text"/> <input style="width: 50%;" type="text"/>
Mobile 1	<input style="width: 50%;" type="text"/> <input style="width: 50%;" type="text"/>
Mobile 2	<input style="width: 50%;" type="text"/> <input style="width: 50%;" type="text"/>
E-mail Address	<input style="width: 100%;" type="text"/>

#### Correspondence Addresses

If you wish our correspondence to go to any other address than indicated above, please tick this box  and provide details overleaf.

Declaration by the Policy Owner: I hereby acknowledge that the information given in this form shall form part of my application form and/or policy and I acknowledge that all information herein provided is subject to the same conditions as shown on the application form and policy documents. I acknowledge that the information contained in this form and information regarding me and any Reportable Account(s) may be provided to the Inland Revenue and exchanged with tax authorities of other countries/jurisdiction(s) in which I may be tax resident pursuant to intergovernmental agreements to exchange financial account information. I bind myself to inform MAPFRE MSV throughout the term of the policy, should there be any change to any of the information provided in this form.

Signature of Policy Owner(s)	Date
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MAPFRE MSV Life p.l.c. is authorised by the Malta Financial Services Authority to carry on long term business under the Insurance Business Act 1998.