

## Life Choices

Please read before completing this form.

Tax authorities require Coralisle Group Ltd. to collect and report certain information about each account holder's tax status for the purposes of US Foreign Account Tax Compliance Act (FATCA) and the Common Reporting Standard (CRS). Please complete the sections below as directed and provide any additional information that is requested. Please note that we may be obliged to share this information with the relevant tax authorities.

**Please Note:** You are required to complete all relevant sections in relation to all known accounts held with Coralisle Group Ltd. member companies and to provide any additional information as required to evidence the declaration made. If any of the information below changes in the future, please ensure you advise Coralisle Group Ltd. of these changes within thirty (30) days.

If you have any questions about how to complete this form, please contact your tax advisor.

Every Section must be completed fully or as indicated. Please print throughout.

### PART 1 INSURED'S INFORMATION

First Name \_\_\_\_\_ Middle Initial(s) \_\_\_\_\_ Last Name \_\_\_\_\_  
 Gender  M  F Date of Birth (DD/MM/YY) \_\_\_\_\_ Place of Birth \_\_\_\_\_  
 Life Insured \_\_\_\_\_ Policy Number \_\_\_\_\_  
 Policy Owner (if other than the Life Assured) \_\_\_\_\_

### PART 2 US TAX (For further details, please refer to [www.irs.gov](http://www.irs.gov))

A. Are you a citizen or resident of the US?  No (complete Part 2 B)  
 Yes (tick and complete below then complete Part 2 B)  
 US Citizen or US Passport Holder  Green Card Holder  Reside in the US for over 183 days  
 Please attach a completed W-9 (US person) form  Attached Tax ID No. \_\_\_\_\_

B. I \_\_\_\_\_ certify that I  am  am not a US citizen and that I  am  am not a US resident for tax purposes.  
 Signature \_\_\_\_\_ Date (DD/MM/YY) \_\_\_\_\_

### PART 3 CRS (For further details, please refer to [www.oecd.org](http://www.oecd.org))

A. Please indicate all countries in which you are a resident for tax purposes (i.e., where you are liable to pay tax) and the associated tax reference numbers in the table below:

Country/Countries of Tax Residency	Tax reference/TIN/Identification number

If a Tax reference/TIN/ Identification number is unavailable, please state why below:

\_\_\_\_\_

B. i. I \_\_\_\_\_ certify that I am a resident for tax purposes in the Countries listed in Part 3 A.  
 ii. I \_\_\_\_\_ certify that I am not a resident in any country for tax purposes (other than as provided in Parts 2 B or 3 A above, if any).

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**PART 4** CONSENT

Where legally obliged to do so, I hereby consent to the recipient sharing this information with the relevant tax information authorities globally for the purposes of US Foreign Account Tax Compliance Act (FATCA), UK FATCA and the Common Reporting Standard (CRS).

I declare that all statements made in this declaration are, to the best of my knowledge and belief, correct and complete. I undertake to advise Coralisle Life Assurance Company Ltd. promptly of any changes in circumstances which causes the information contained herein to become incorrect and to provide Coralisle Life Assurance Company Ltd. with a suitable updated Declaration within thirty (30) days of such change in circumstances.

Member's Signature \_\_\_\_\_ Date (DD/MM/YY) \_\_\_\_\_

**PART 5** DISCLAIMER

Coralisle Life Assurance Company Ltd. are not tax and/or legal advisors and no information contained herein or otherwise disseminated by or on behalf of Coralisle Life Assurance Company Ltd. in any circumstances constitutes, should be construed as or substituted for independent tax and/or legal advice. If you have any questions about your tax residency or the completion of any items in this form, please contact your tax advisor.

**TO BE COMPLETED BY CORALISLE**

US Indicia Found    UK Indicia Found    CRS Indicia Found    FATCA/CRS Status: \_\_\_\_\_

Documentation received:    W-9 Form    UK Self-Certification    CRS Self-Certification