

## CERTIFICATION OF TAX STATUS Self Certification Form

**Tax Residency**

Tax regulations<sup>1</sup> require us to collect information about your tax residency<sup>2</sup>. In certain circumstances (including if we do not receive a valid self-certification from you) we will be obliged to share information about your account(s) with The Revenue who may in turn share this information with any or all participating tax jurisdictions<sup>3</sup>.

Please indicate all countries in which you are resident for tax purposes and your associated Tax Identification Number(s) in the table below. If you are also a US citizen you must include United States in this table along with your US Tax Identification Number. If you have any questions about your tax residency<sup>2</sup>, please contact your tax adviser as Harcourt Life Ireland DAC are not authorised to provide financial advice.

Please refer to the explanatory notes overleaf when completing this form.

Country of Residence for tax purposes	Tax Identification Number (TIN)

### Section A – Personal Details

**Please complete the following in full**

Policy Number:

Name

Date of Birth:

Residential Address  
:

Postcode
Country

Nationality

Country of Residence

Are you a US Citizen? Yes  No

If yes please confirm your social security number:

## Section B: Declaration:

### Declaration and undertaking:

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

I agree to notify Harcourt Life Ireland DAC immediately if any of this information changes in the future.

Signed

Date

Further information on Automatic Exchange of Information (AEOI) is available on the revenue website [www.Revenue.ie](http://www.Revenue.ie) or <http://www.oecd.org/tax/automatic-exchange/>.

### Please return the completed form to:

Harcourt Life Ireland DAC  
16 Joyce Way  
Park West Business Park  
Dublin 12

## Explanatory Notes

1. The term “tax regulations” refers to the International Tax Compliance Regulations 2015 which implements the Foreign Account Tax Compliance Act (FATCA) and the OECD Common Reporting Standard for Automatic Exchange of Financial Account Information (CRS).
2. In general, you are tax resident where you are liable to taxes, based on where you live and work permanently although different jurisdictions have different rules in relation to tax residency. If in doubt, please contact your tax adviser.
3. Those countries that have agreed to exchange information under FATCA and the CRS<sup>1</sup>.

\* You are not required to provide details of your Tax Identification Number (TIN) or Date of Birth If you are:

1. A Republic of Ireland Tax resident and
2. Not a tax resident anywhere else and
3. Not a US citizen and
4. Not resident in a jurisdiction that is reportable under CRS or FATCA.

## Privacy Statement

Our Privacy Statement explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how long we keep customer information for, how a customer can obtain details of the information we keep and the choices customers have about how we use that information. You can find a copy on our website [www.harcourtlife.ie](http://www.harcourtlife.ie) or you can request a copy from our Customer Service Team.