



Individual Self-Certification Form

i **IMPORTANT: COMPLETION OF THIS FORM IS MANDATORY.** Tax regulations¹ require us to collect information about each Beneficial Owner's tax residency. In certain circumstances (including if we do not receive a valid self-certification from you) we may be obliged to share the information on your policy with the appropriate government authorities. If you have any questions about your tax residency, please contact your tax advisor. Should any information provided change in the future, please ensure you advise us of such changes within 30 days.

1. General information

Application, policy number, client ID number (if known)	Policy owner(s)
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2. Self-certification policy / Applicant

Full name (first, middle and last)		
Date of birth (DD / MM / YY)	Country of birth	
Residential address		
City	Postal code	Country
Mailing address (if different from above)		
Daytime telephone number	Email	
Do you have tax obligations in any jurisdiction(s) other than your stated country of residence, or stated country of registered business address? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If "Yes", please list jurisdiction(s) / country(s) below along with Taxpayer Identification Number (TIN)		
Jurisdiction / Country	TIN	

3. Signature of policy owner / Applicant

- I declare that all answers and statements made in this declaration are correct and complete.
- I acknowledge and agree that the information contained in this form and information regarding income paid or credited to or for the benefit of the policy may be reported to the tax authorities of the country in which I am tax resident.
- I undertake to advise and submit a new form to BF&M within 30 days of any change in circumstances which causes the information contained herein to become incorrect and to provide BF&M with an update of said changes.

Print name	
Signature X	Date of completion (DD / MM / YY)

¹ The term "tax regulations" refers to the regulations created to enable automatic exchange of information and includes FATCA and CRS reporting, various agreements to improve international tax compliance entered into between the UK and its Crown Dependencies and its Overseas Territories and OECD Common Reporting Standard for automatic exchange of financial information.