

Tax Residence Self-Certification



(change of ownership or tax residency)

Policy number:

This form must be completed if:

- There's a change of ownership on the bond, or
- There's a change of tax residency for one or more policyholders or trustees.

If there are to be more than four trustees please attach details on a separate sheet of paper. Please make sure you give all the information requested below, for each additional trustee.

You need to complete this form. If you don't we'll have to report details of your policy to Her Majesty's Revenue and Customs (HMRC).

Important information

The UK Government has and will be entering into a number of inter-governmental agreements to share tax information, where applicable, with the tax authorities in other territories. The requirement to collect information about each customer's tax residence is part of UK legislation and as a financial services company we're legally obliged to collect it. We're asking for your tax residency and Tax Identification Number (where applicable) and will record this on our records.

Tax residency rules vary from country to country. Generally your tax residence is likely to be the country in which you should pay income tax and where you live for more than half a year, but this isn't always the case. Special circumstances (such as studying abroad, working overseas, or extended travel) may cause you to be resident elsewhere or resident in more than one country at the same time (dual residency).

If you're unsure about your tax residence in a territory you should speak to a financial adviser or visit the tax authority website for that territory.

If you're tax resident in a territory other than the UK then we'll report the information listed below to Her Majesty's Revenue & Customs (HMRC) and they may transfer that information to the government of that other territory in accordance with the relevant agreement.

The information is as follows:

- Your name, address, jurisdiction of tax residence, Tax Identification Number (TIN) and date of birth.
- Your account/policy number and that the account/policy is with Aviva.
- The balance or value of your account/policy at the end of the year or at the date it was closed.
- The gross amount of interest, dividends, proceeds from sale or redemption or other amounts paid or credited to you or your account/policy during the year.

In accordance with those agreements, UK Government will also begin to receive information from Governments of other territories about non-UK accounts held by UK tax residents.

Please return the completed form to the address provided on your covering letter.

Data Privacy

To learn about how Aviva processes Personal Information, please see our privacy policy at aviva.co.uk/privacypolicy. It's updated from time to time to take account of changes in our business activities, legal requirements and to make sure it's as transparent as possible,

so please check back in to see the latest version. A paper copy can be provided on request by writing to: Data Protection Team, PO Box 7684, Pitheavlis, Perth, PH2 1JR

First policyholder/trustee

Your full name

Your date of birth

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Full address

1. Are you resident for **tax purposes** anywhere other than the United Kingdom (UK)? Yes No

Notes:

(i) UK is England, Northern Ireland, Scotland and Wales.

(ii) If you're a US citizen or hold a US passport or green card, you'll also be considered tax resident in the US even if you live outside the US so you must answer 'Yes'.

2. If you answered 'Yes' to question 1, please list below the country or countries you're resident in for tax purposes, along with any Tax Reference number(s)/Tax Identification Numbers(s) (TIN).

Country/Countries of tax residency	Tax Identification Number/Reference Number or equivalent

If you don't have a Tax Identification Number or equivalent, please tell us why in the box below.

Declaration

I confirm the information I've provided is correct. I agree to notify Aviva immediately if any of this information changes in the future.

Your signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Second policyholder/trustee

Your full name

Your date of birth

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Full address

Postcode/Zip

1. Are you resident for **tax purposes** anywhere other than the United Kingdom (UK)? Yes No

Notes:

(i) UK is England, Northern Ireland, Scotland and Wales.

(ii) If you're a US citizen or hold a US passport or green card, you'll also be considered tax resident in the US even if you live outside the US so you must answer 'Yes'.

2. If you answered 'Yes' to question 1, please list below the country or countries you're resident in for tax purposes, along with any Tax Reference number(s)/Tax Identification Numbers(s) (TIN).

Country/Countries of tax residency	Tax Identification Number/Reference Number or equivalent

If you don't have a Tax Identification Number or equivalent, please tell us why in the box below.

Declaration

I confirm the information I've provided is correct. I agree to notify Aviva immediately if any of this information changes in the future.

Your signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Third policyholder/trustee

Your full name

Your date of birth

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Full address

Postcode/Zip

1. Are you resident for **tax purposes** anywhere other than the United Kingdom (UK)? Yes No

Notes:

(i) UK is England, Northern Ireland, Scotland and Wales.

(ii) If you're a US citizen or hold a US passport or green card, you'll also be considered tax resident in the US even if you live outside the US so you must answer 'Yes'.

2. If you answered 'Yes' to question 1, please list below the country or countries you're resident in for tax purposes, along with any Tax Reference number(s)/Tax Identification Numbers(s) (TIN).

Country/Countries of tax residency	Tax Identification Number/Reference Number or equivalent

If you don't have a Tax Identification Number or equivalent, please tell us why in the box below.

Declaration

I confirm the information I've provided is correct. I agree to notify Aviva immediately if any of this information changes in the future.

Your signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Fourth policyholder/trustee

Your full name

Your date of birth

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Full address

Postcode/Zip

1. Are you resident for **tax purposes** anywhere other than the United Kingdom (UK)? Yes No

Notes:

(i) UK is England, Northern Ireland, Scotland and Wales.

(ii) If you're a US citizen or hold a US passport or green card, you'll also be considered tax resident in the US even if you live outside the US so you must answer 'Yes'.

2. If you answered 'Yes' to question 1, please list below the country or countries you're resident in for tax purposes, along with any Tax Reference number(s)/Tax Identification Numbers(s) (TIN).

Country/Countries of tax residency	Tax Identification Number/Reference Number or equivalent

If you don't have a Tax Identification Number or equivalent, please tell us why in the box below.

Declaration

I confirm the information I've provided is correct. I agree to notify Aviva immediately if any of this information changes in the future.

Your signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

| Retirement | **Investments** | Insurance | Health |

Aviva Life & Pensions UK Limited. Registered in England No 3253947. Aviva, Wellington Row, York, YO90 1WR. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Firm Reference Number 185896.

[aviva.co.uk](https://www.aviva.co.uk)

IN06062 04/2022 © Aviva

