

ANNEXURE TO THE PROPOSAL FORM

TO BE FILLED BY PROPOSER

Proposer's Name: _____

Proposal/Application NO.: _____

Resident for Tax Purposes in Jurisdiction(s) outside India:

☐ Yes

☐ No

(If "YES" then mandatorily to fill the balance details and sign. If "NO" then sign)

Country of Birth: _____

For the purposes of taxation, I am a resident in the following countries and my Tax Identification Number (TIN)/functional equivalent in each country is set out below or I have indicated that a TIN/functional equivalent is unavailable (kindly fill details of all countries of tax residence if more than one):

Country/countries of tax residency	Address in the jurisdiction for Tax Residence	Tax Identification Number (TIN)/ Functional equivalent Number	TIN/ Functional equivalent Number Issuing Country	Validity of documentary evidence provided

DECLARATION AND UNDERTAKINGS

I/We, certifies that:

- It shall be my / our responsibilities to educate myself / ourself and to comply at all times with all relevant laws relating to reporting under section 285BA of the Act read with the Rules 114F to 114H of the Income tax Rules, 1962 thereunder and the information provided in the Form is in accordance with the aforesaid rules,
- The information provided by me/us in the Form, its supporting Annexures as well as in the documentary evidence are, to the best of our knowledge and belief, true, correct and complete and that I/we have not withheld any material information that may affect the assessment/categorization of the account as a Reportable account or otherwise,
- I/We permit/authorise the Company to collect, store, communicate and process information relating to the Account and all transactions therein, by the Company and any of its affiliates wherever situated including sharing, transfer and disclosure between them and to the authorities in and/or outside India of any confidential information for compliance with any law or regulation whether domestic or foreign,
- I / We undertake the responsibility to declare and disclose within 30 days from the date of change, any changes that may take place in the information provided in the Form, its supporting Annexures as well as in the documentary evidence provided by us or if any certification becomes incorrect and to provide fresh self-certification along with documentary evidence,
- I / We also agree that in case of our failure to disclose any material fact known to us, now or in future, the Company may report to any regulator and/or any authority designated by the Government of India (GOI) /RBI/IRDA for the purpose or take any other action as may be deemed appropriate by the Company if the deficiency is not remedied by us within the stipulated period.
- I / We hereby accept and acknowledge that the Company shall have the right and authority to carry out investigations from the information available in public domain for confirming the information provided by me / us to the Company.
- I/We also agree to furnish such information and/or documents as the Company may require from time to time on account of any change in law either in India or abroad in the subject matter herein.
- I/We shall indemnify the Company for any loss that may arise to the Company on account of providing incorrect or incomplete information.

Date: _____

Signature (s) _____

Place: _____

Name: _____

Instructions

- All the above information should be mandatorily provided by life Insured / Proposer/Payer/Assignee/etc,
- All the Addresses provided in Proposal and the above annexure should contain City/Town, State, Postal Code and Country
- Clarification / Guidelines on filling details if applicant residence for tax purposes in jurisdiction(s) outside India
 - Jurisdiction(s) of Tax Residence: Since US taxes the global income of its citizen, every US citizen of whatever nationality, is also a resident for tax purpose in USA.
 - Tax identification Number (TIN): TIN need not be reported if it has not been issued by the jurisdiction. However, if the said jurisdiction has issued a high integrity number with an equivalent level of identification (a "Functional equivalent"), the same may be reported. Examples of that type of number for individual include, a social security/insurance number, citizen/personal identification/services code/number and resident registration number)