Certification of Tax Status

Self-certification form

MONUMENT
Life Insurance dac

In order to comply with laws in relation to the international automatic exchange of information in relation to tax matters (AEOI), Monument Life must obtain certain information from you including (a) where you are resident for tax purposes and (b) whether you are a United States citizen. Further information in relation to AEOI can be found on the Revenue Commissioner's AEOI web page on www.revenue.ie.

Monument Life Policy Number
(If applicable)

Note:
Please complete in BLOCK CAPITALS.

Personal Details

Mr Mrs Ms Forename

Surname

Residential Address

Email Address

Date of Birth

Telephone Number (work)
(home)
(mobile)

Nationality

Country of Residence

Certification of Tax Status

Please complete questions 1 and 2. Please note that we may require further information from you.

1. Are you a United States citizen? Yes No

If **Yes**, please confirm your social security number

2. Are you tax resident anywhere other than the Republic of Ireland? Yes No

Note: You may be tax resident in more than one jurisdiction.

If **Yes**, please complete the below:

Country of residence for tax purposes	Tax identification number

Declaration

I declare that the information provided in this form is correct, accurate and complete. I agree to inform Monument Life if there is any change to my tax status and/or any other circumstances that results in this information no longer being correct, accurate or complete.

If you are a United States citizen or if you are resident for tax purposes in the United States or any other jurisdiction(s) other than the Republic of Ireland, certain information about you and your policy may be reported by Monument Life to the Irish Revenue Commissioners. Under domestic and international tax compliance laws, the Revenue Commissioners may be required to report this information to other tax authorities in the United States (if you are a United States citizen or you are resident for tax purposes in the United States) or any other jurisdiction(s) in which you are resident for tax purposes.

Note:
Further information in relation to the automatic exchange of information in relation to tax matters (AEOI) can be found on the Revenue Commissioner's webpage at www.revenue.ie

Please sign and date

Signature

X

Date

Please return this form to Monument Life Insurance dac, IPB Admin, Bishop's Square, Redmond's Hill, Dublin 2, D02 TD99, Ireland.

NP 717206 (06/26) CG90

The Monument International Portfolio Bond is provided by Monument Life Insurance dac.

Monument Life Insurance dac is regulated by the Central Bank of Ireland and subject to limited regulation by the Financial Conduct Authority and the Prudential Regulation Authority.
Registered office: 2 Park Place, Ground Floor, Upper Hatch Street, Dublin 2, Ireland.
Registered in Ireland under company number 325795. Telephone number 0370 850 6130.

We may record or monitor calls to improve our service.

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