

Proposal No

Proposer/ Accountholder Name\*   
(\* In case of Joint name, declaration to be provided by both the proposers. An accountholder is person who is entitled to receive the cash value or change the beneficiary of the contract)

Spouse's Name  Country of Birth  Place of Birth

**IDENTIFICATION PROOF:**

PAN       Aadhar No       Passport       Election ID Card       ID Card       Driving License  
 NREGA Job Card      Other \_\_\_\_\_ Identification No

Are you a tax resident of any country other than India?    Yes     No

**If yes, please provide details below:**  
(Please indicate all countries in which you are resident for tax purposes and associated details)

Sl No	Country/(ies) of Tax residency #	Tax Identification Number (TIN)/ Functional equivalent number*	Identification Type (TIN or Other*, please specify)
1			
2			

\*To also include United States of America (USA), where the individual is a citizen/ green card holder of USA. \*In case such number is not available, kindly provide an explanation and attach it to this form.

Residence address/(es) for Tax purposes: (include City, State, Country & Pin code)

Address Type:     Residential or Business       Residential       Business       Registered Office

Contact details:    Country code       Telephone/ Mobile No

**Certification - Under penalty of perjury, I certify that:**

- I am aware that Central Board of Direct Taxes ("CBDT") has notified Rules 114F to 114H as part of the Income-tax Rules, 1962, (read alongwith FATCA/CRS instructions given below) which require Indian financial institutions such as SBI Life to seek additional personal, tax and beneficial owner information and certain certifications and documentation from all our proposers/ accountholders.
- I understand that SBI Life is relying on information provided in this form for the purpose of determining the status of the accountholder in compliance with FATCA/CRS. SBI Life is not able to offer any tax advice on FATCA or CRS or its impact on me.
- I acknowledge my responsibility to seek advice from professional tax advisor for any tax questions. I agree to submit a new form within 30 days if any information or certification on this form changes or becomes incorrect.
- I agree that as may be required by domestic regulators/tax authorities, SBI Life may be required to report, reportable details to CBDT or other authorities/agencies or may be required to provide information to any institutions such as withholding agents for the purpose of ensuring appropriate withholding from the policy/(ies) or any proceeds in relation thereto or even close or suspend my policy/(ies), as appropriate.

Signature of Proposer/ Accountholder       Date:       Place

**FATCA/CRS Instructions**

In case Proposer/Accountholder has the following Indicia pertaining to a foreign country and yet declares self to be non-tax resident in the respective country, Proposer/Accountholder to provide relevant **Curing Documents** as mentioned below:

FATCA/ CRS Indicia observed (ticked)	Documentation required for Cure of FATCA/ CRS indicia
	<b>If Proposer/Accountholder does not agree to be Specified USA person/ reportable person status</b>
a. United States of America ("USA") place of birth	1. Self-certification (as stated above) that the Proposer/Accountholder is neither a citizen of USA nor a resident for tax purposes of USA; 2. Non-USA passport or any non-USA government issued document <b>evidencing nationality or citizenship</b> (refer list below); <b>AND</b> 3. <b>Any one</b> of the following documents: a. Certified Copy of "Certificate of Loss of Nationality or b. Reasonable explanation of why the Proposer/Accountholder does not have such a certificate despite renouncing USA citizenship; or Reason the Proposer/Accountholder did not obtain USA citizenship at birth
b. Residence/ mailing address in a country other than India	1. Self-certification (as stated above) that the Proposer/Accountholder is neither a citizen of USA nor a resident for tax purposes of USA or any other foreign jurisdiction; <b>AND</b> 2. Documentary evidence (refer list below)
c. Telephone number in a country other than India (and no telephone number in India provided)	1. Self-certification (as stated above) that the Proposer/Accountholder is neither a citizen of USA nor a resident for tax purposes of USA or any other foreign jurisdiction; <b>AND</b> 2. Documentary evidence (refer list below)
d. Standing instructions to transfer funds to an account maintained in a country other than India	1. Self-certification (as stated above) that the Proposer/Accountholder is neither a citizen of USA nor a resident for tax purposes of USA or any other foreign jurisdiction; <b>AND</b> 2. Documentary evidence (refer list below)

List of acceptable documentary evidence needed to establish the residence(s) for tax purposes:

- Certificate of residence issued by an authorized government body\*\*
- Valid identification issued by an authorized government body\*\* (e.g. Passport, National Identity card, etc.)

\*\*Government/ agency thereof or a municipality of the country or territory in which the Proposer/Accountholder claims to be a resident.