LIFE GOALS. DONE.

FATCA/ CRS DECLARATION UNDER INCOME-TAX RULES
PART I

I/ we, do hereby provide the following information in regards to proposal/ policy for life insurance made with Bajaj Life Insurance Limited:

Proposal Number/ Policy Number					
Name					
Nationality		**Country of Birth**		**Are you a US Person? (Yes/ No)**	

Please answer the following questions:

Sl. No.	Question	Yes/ No	If Yes
1.	Are you Resident of any country outside India		**Name of Country** (Submit the photocopy of Passport): **Complete Address**: House No./ Building: Street Name/ No.: Area & City: State & Country: PIN/ ZIP:
2	Are you a Tax Resident of a country (or countries) outside India		**TIN** (submit the documentary proof): **TIN Issuing Country** (or Countries) Name:

Under penalty of perjury,
I/ we agree that as may be required by domestic or overseas regulators and/or tax authorities, Bajaj Life Insurance Limited may report, reportable details to the domestic or overseas regulators and/or tax authorities and/ or may withhold from my/ our policy account(s) such amount as may be required according to applicable laws, regulations and directives.

I/ we undertake to inform Bajaj Life Insurance Limited by submitting submit a new form within 30 days if any information or certification on this form becomes incorrect or if there is a change in response to any of the questions above. I/ we also agree to provide additional information as and when required by Bajaj Life Insurance Limited. I/ we certify that the information disclosed above is true, accurate and complete, including the tax payer identification number, to the best of my/ our knowledge and nothing material has been concealed or misrepresented.

Date: _____ Place: _____ Signature:
_____

PART II - SELF CERTIFICTION

To be filled only if:

(a) If your place of Birth or current residence or Tax residence is in a place outside India and Tax Identification Number (TIN) or Functional equivalent is not available, OR

(b) In case you are declaring US person status as "no" but your country of birth is US, please provide document evidencing relating to relinquishment of

US citizenship. If not available provide reasons for not having relinquishment certificate - . . . . . .

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I confirm that I am neither a US person nor resident for Tax purpose in any other country other than India, though one or more parameters in Part I suggest my relation with any country outside India. Therefore, I am providing the following document as proof of my citizenship and tax residency in India.

Details of Document proof submitted (Please tick document being submitted)

☐ Passport ☐ Election ID Card ☐ PAN Card ☐ Driving License ☐ Latest ITR

☐ UIDAI (Aadhar Card) ☐ Any other Govt. issued ID Card. Please specify _____.

Date: _____ Place: _____ Signature:

_____