



## Tax residency – Individuals

Additional information required for Non-superannuation money investments in Guaranteed Annuity, Guaranteed Annuity (Liquid Lifetime) and CarePlus.

Information about investors that are foreign tax residents must be reported to the Australian Taxation Office (ATO) in accordance with international tax reporting standards and laws to which Australia is subject. These include the OECD Common Reporting Standard (CRS) and United States Foreign Account Tax Compliance Act (FATCA).

If you require further information on the CRS or FATCA, please visit the ATO's website [www.ato.com.au](http://www.ato.com.au)

### Investor 1 Tax information – please answer BOTH tax residency questions

Are you an Australian resident for tax purposes?  Yes  No

Are you a tax resident of another country?  Yes  No

If you are a tax resident of a country other than Australia, please provide your Tax Identification Number (TIN) or equivalent below. If you are a tax resident of more than one country, please list all relevant countries below.

1. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
2. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
3. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
4. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>

Reason A – The country of tax residency does not issue TINs to tax residents.

Reason B – I have not been issued with a TIN.

Reason C – The country of tax residency does not require the TIN to be disclosed.

### Investor 2 Tax information – please answer BOTH tax residency questions

Are you an Australian resident for tax purposes?  Yes  No

Are you a tax resident of another country?  Yes  No

If you are a tax resident of a country other than Australia, please provide your Tax Identification Number (TIN) or equivalent below. If you are a tax resident of more than one country, please list all relevant countries below.

1. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
2. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
3. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
4. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>

Reason A – The country of tax residency does not issue TINs to tax residents.

Reason B – I have not been issued with a TIN.

Reason C – The country of tax residency does not require the TIN to be disclosed.

I/We declare that all details provided are true and correct and I/we indemnify Challenger Life Company Limited (ABN 44 072 486 938) (AFSL 234670) against any liabilities whatsoever arising out of it acting on any incorrect or misleading information provided by me/us in connection with this information.

#### Investor 1

Signature (please sign)

Date

 /  / 

Print name

Policy number

#### Investor 2

Signature (please sign)

Date

 /  / 

Print name

