



## Change of contact details

Please complete in **BLOCK CAPITALS** and tick boxes where appropriate.

Full name of individual(s) (changing address)	<input type="text"/>		
	<input type="text"/>		
Policy number(s)	<input type="text"/>		
I am a:	Trustee <input type="checkbox"/>	Policyholder <input type="checkbox"/>	Life assured <input type="checkbox"/>
			Director <input type="checkbox"/>
Please change address/contact details with effect from	Date (day, month, year)	<input type="text"/>	
Old address	<input type="text"/>		
	<input type="text"/>		
	Postcode	<input type="text"/>	<input type="text"/>
New address	<input type="text"/>		
	<input type="text"/>		
	Postcode	<input type="text"/>	<input type="text"/>
Telephone number(s)		Preferred contact number	
Home	<input type="text"/>	<input type="checkbox"/>	
Business	<input type="text"/>	<input type="checkbox"/>	
Mobile	<input type="text"/>	<input type="checkbox"/>	
E-mail address	<input type="text"/>	<input type="checkbox"/>	

Tax regulations require us to collect information about the tax residency of each individual who has an account with us ('Canada Life International Limited', 'CLI Institutional Limited' or 'Canada Life International Assurance (Ireland) DAC'). If you are resident in a reportable jurisdiction then we will share certain information with the Irish Revenue Commissioners or the Isle of Man Income Tax Authority dependent upon which type of account you have. This information may also be exchanged by both the Irish Revenue Commissioners and the Isle of Man Income Tax Authority with other tax authorities.

### Tax residency

If you have any questions on how to complete this section we recommend that you speak to your tax or legal advisor, as Canada Life International Limited, CLI Institutional Limited or Canada Life International Assurance (Ireland) DAC (together 'the Company') are not authorised to give such advice.

Please list the country(ies)/jurisdiction(s) in which you are resident for tax purposes, together with the corresponding reference number(s), and for any other policyholders/trustees or directors.

Your full name(s)	<input type="text"/>	Country(ies)/jurisdiction(s) of tax residency	<input type="text"/>
Date of Birth	<input type="text"/>	National insurance number* or local tax reference number(s)* if resident outside of the UK	<input type="text"/>

**Tax residency Continued**

Your full name(s)	<input type="text"/>	Country(ies)/jurisdiction(s) of tax residency	<input type="text"/>
Date of Birth	<input type="text"/>	National insurance number* or local tax reference number(s)* if resident outside of the UK	<input type="text"/>
Your full name(s)	<input type="text"/>	Country(ies)/jurisdiction(s) of tax residency	<input type="text"/>
Date of Birth	<input type="text"/>	National insurance number* or local tax reference number(s)* if resident outside of the UK	<input type="text"/>
Your full name(s)	<input type="text"/>	Country(ies)/jurisdiction(s) of tax residency	<input type="text"/>
Date of Birth	<input type="text"/>	National insurance number* or local tax reference number(s)* if resident outside of the UK	<input type="text"/>

**Important information**

\* Your national insurance and tax reference numbers are the personal references which are assigned to you by the relevant authority. These can be found in a number of ways the most common of which are listed below:

- By contacting the relevant authority
- On your tax return or notification of coding
- On your payslip or through your employer
- From your accountant or tax adviser

Should your tax residency change at any time in the future, you must notify the Company immediately.

Any personal information that you may provide to the Company as data controller will be treated in accordance with the Data Protection Act 2002.

If submitting personal information about another person, by signing this form you confirm that you have their consent to provide such information to the Company and for their information to be used as set out in this notice.

By signing this form you consent to the Company using and sharing this information in accordance with the applicable Tax Regulations.

Where any information is being released to any relevant authority, the Company may use electronic communications.

**Tax residency**

Your tax residency is generally the country in which you live for more than half a year.

Special circumstances (such as studying abroad, working overseas, or extended travel) may cause you to be resident elsewhere or resident in more than one country at the same time (dual residency).

The country(ies) in which you pay income tax are likely to be your country(ies) of tax residence.

If you are a US citizen or hold a US passport or green card, you will also be considered tax resident in the US even if you live outside the US.

A National Insurance number is acceptable for UK residents.

If all sections of this form are not fully completed this may delay the processing of your instruction and we reserve the right to default report any persons associated with this policy to the relevant authority under the applicable Automatic Exchange of Information (AEOI) legislation.

You should be aware that the signatories to this form will be making any declaration on behalf of the 'Controlling Persons'.

I declare that the information provided on this form is, to the best of my knowledge and belief, accurate and complete.

Your signature

Date (day, month, year)

(This must be the signature of the Individual who is changing their contact details)

Please enclose a certified copy of address verification to make sure that there are no delays in future transactions on the policy. Please refer to our 'Guide to anti-money laundering' (ID3034) for a list of suitable documents.



## Canada Life International

Canada Life International Limited, registered in the Isle of Man no. 33178.  
Registered office: Canada Life House, Isle of Man Business Park, Douglas, Isle of Man IM2 2QJ.  
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Canada Life International Limited and CLI Institutional Limited are Isle of Man registered companies authorised and regulated by the Isle of Man Financial Services Authority. Canada Life International Assurance (Ireland) DAC is authorised and regulated by the Central Bank of Ireland.