

INTERNATIONAL TAX (FATCA/CRS) SELF CERTIFICATION FORM FOR CANOE EL PROTECTION PORTFOLIOS CONTRACTS

Throughout this form, "Empire Life" means The Empire Life Insurance Company.

Important information for completing this form

- If you are a Snowbird, only complete the Snowbird Self Certification Form on the second page of this document.
- If there are multiple contract owners, a self certification form is required for each owner.
- If you are completing this form with your advisor, you must present an original piece of government issued identification to your advisor for verification of your residency status. Acceptable forms of identification include a driver's licence or passport.
- If you are not completing this form with your advisor, you must provide proof of residency status by attaching a photocopy of your government issued identification, as listed above.
- If the contract owner is a corporation or other entity, complete form Canoe-C-0044.
- For more information on the Foreign Account Tax Compliance Act (FATCA) or the Common Reporting Standard (CRS), refer to the CRA website - www.cra-arc.gc.ca and search "FATCA" or "CRS".

Contract Information		
Contract number(s)		
First name of owner	Middle initial	Last name
Address (number, street) (If using a PO Box, also provide your physical address.)		
City	Province	Postal code
Country	Date of birth	Phone number
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Where do you reside for tax purposes? (check all that apply)		
<input type="radio"/> Canada <input type="radio"/> U.S. (resident or citizen) – Tax Identification Number (TIN) _____ If you do not have a TIN from the U.S. have you applied for one? <input type="radio"/> yes <input type="radio"/> no		
<input type="radio"/> Other – specify country _____ TIN _____ If you do not have a TIN, specify the reason: <input type="radio"/> I will apply or have applied for a TIN but have not yet received it. <input type="radio"/> My jurisdiction of tax residence does not issue TINs to its residents. <input type="radio"/> Other – specify reason _____		
Advisor Verification and Declaration		
Which government issued document is being used to verify the residency status of the owner?		
<input type="radio"/> Drivers licence <input type="radio"/> Passport <input type="radio"/> Other _____		
Document #	Expiry date	
	d d - m m m - y y y y	
Jurisdiction and country of issue	Date of verification	
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I declare that I have checked for any indication the owner may be a U.S. Person or tax resident of a country outside of Canada or the U.S.		
Signature of advisor	Date	
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Contract Owner Certification and Agreement		
I certify that my answers are true to the best of my knowledge and belief, and that they may be relied upon by Empire Life. I agree to notify Empire Life if there is a change in my tax residency status.		
Signature of owner	Date	
X	d d - m m m - y y y y	

