

Information on FATCA and Self-certification form

The Indian Government has signed an Inter-Governmental Agreement (IGA) with the United States (US) on July 9, 2015 to implement the Foreign Account Tax Compliance Act (FATCA) and the CRS Multilateral Competent Authority Agreement (MCAA) on June 3, 2015, to support the global move towards Automatic Exchange of Information (AEOI).

We have taken steps towards implementation of FATCA and CRS with effect from **March 01, 2016**. Complying with the due diligence process under FATCA, we have shared a Self-certification form with the customers including annuity policyholders and entities. The Self-certification form for individuals and entities is different. As this is a mandatory compliance, it must be strictly adhered to.

With respect to the Self-certification Form, please note:

- ❑ All customers (Indian residents and Non-resident Indians) to whom the Self-certification form is sent, should forward us a duly filled and signed Self-certification form along with self-attested copies of the documents stated therein.
- ❑ The Self-certification form may be sent to us either by mailing a **scanned copy at the email address** or **submitting a physical copy at the office address**; details of which are provided in the cover email.
- ❑ If the customer is a **tax resident of India**, he/she needs to indicate the same in section 2 of the self-certification form and **provide his/her Permanent Account Number (PAN) as the TIN** along with a self-attested copy of the same. This is in addition to filling up section 1 of the form.
- ❑ If the **customer is a tax resident of US or any country other than India**, he/she may indicate the same in section 2 of the form and provide the self-attested copies of the documents stated in section 3 of the form. This is in addition to filling up section 1 of the form.

In case of queries, please contact us at any of the touch points mentioned below.

- ❑ Call us on our helpline 1860-267-9999 (10 a.m. to 7 p.m. (Local charges apply)); Do not prefix any country code e.g. +91 or 00)
- ❑ Email us at service@hdfclife.com

Warm regards,
HDFC Life