

# TAX COMPLIANCE CERTIFICATION

## UNITED KINGDOM

Utmost Wealth Solutions is the brand name used by a number of Utmost companies. This item has been issued by Utmost Luxembourg S.A.

Words in the singular include the plural and vice versa. A reference to one gender includes a reference to the other gender.

Policy Number

### Policyholders

Surname(s)	<input type="text"/>	First name(s)	<input type="text"/>
Surname(s)	<input type="text"/>	First name(s)	<input type="text"/>
Surname(s)	<input type="text"/>	First name(s)	<input type="text"/>
Surname(s)	<input type="text"/>	First name(s)	<input type="text"/>

The undersigned Policyholder(s) (the "Policyholders") for one or more life assurance policies (the "Policies") with Utmost Luxembourg S.A., hereby declare that as the Economic Beneficial Owner (the "EBO") of the Policy and, where applicable, the real payer of premiums to the Policies, they comply with all applicable tax obligations (the "Tax Obligations") with regard to the Policies, including the reporting of the Policies and reportable revenues to the relevant tax authorities if required.

The Policyholders also certify that any assets transferred into the Policies comply with all Tax Obligations, including those applicable in the country(ies) of tax residence of the Policyholders and, where different to the Policyholders, the real payer(s) of premiums to the Policies.

The Policyholders shall provide Utmost Luxembourg S.A. with any documentation reasonably requested at any time by Utmost Luxembourg S.A. in order to evidence full compliance of the assets transferred to the Policies with all Tax Obligations.

The Policyholders further confirm that they will comply with all Tax Obligations related to the existence of, and transactions on, the Policies. The Policyholders hereby discharge Utmost Luxembourg S.A. of any liability and will hold Utmost Luxembourg S.A. indemnified for any consequences resulting from the failure on the Policyholders' part to comply with any Tax Obligations. Furthermore, the Policyholders undertake to inform Utmost Luxembourg S.A. within 30 days of any changes that may affect the validity of this declaration.

The Policyholders acknowledge and agree that any declarations and/or documentation related to compliance with the Tax Obligations are essential elements for Utmost Luxembourg S.A., and the Policy will be issued by Utmost Luxembourg S.A. in reliance of the accuracy and completeness of representations made in this document. Any misrepresentation or failure to provide requested documentation, whether intentional or not, may result in the cancellation or voiding of the Policy.

The Policyholders agree that Utmost Luxembourg S.A. may (directly or indirectly) collect and process data with regard to the tax compliance of the Policies.

The Policyholders acknowledge that Utmost Luxembourg S.A. does not provide legal nor tax advice and confirm that they will refer any questions with regard to the Tax Obligations to their legal or tax adviser(s).

The Policyholders agree that Utmost Luxembourg S.A. may disclose this tax compliance certification to third parties, including, without limitation, the Custodian Bank or any Luxembourg or foreign authority, body or court, if such disclosure is required by virtue of the subscription to or the existence of the Policy.

**Policyholder 1**

**SIGNATURE**

Date

d	d	m	m	y	y	y	y
---	---	---	---	---	---	---	---

Place

**Policyholder 2**

**SIGNATURE**

Date

d	d	m	m	y	y	y	y
---	---	---	---	---	---	---	---

Place

**Policyholder 3**

**SIGNATURE**

Date

d	d	m	m	y	y	y	y
---	---	---	---	---	---	---	---

Place

**Policyholder 4**

**SIGNATURE**

Date

d	d	m	m	y	y	y	y
---	---	---	---	---	---	---	---

Place

---

Surname(s)

First name(s)

**EBO**

**SIGNATURE**

Date

d	d	m	m	y	y	y	y
---	---	---	---	---	---	---	---

Place

## A WEALTH *of* DIFFERENCE

[www.utmostinternational.com](http://www.utmostinternational.com)

Utmost Luxembourg S.A. is registered with R.C.S. under number B37604 and regulated by the Commissariat aux Assurances (CAA)  
Registered office address: 4, rue Lou Hemmer, L-1748 Luxembourg, Grand-Duché de Luxembourg  
Utmost Wealth Solutions is registered in Luxembourg as a business name of Utmost Luxembourg S.A.