

## AEOI マイナンバー申告書

# AUTOMATIC EXCHANGE OF INFORMATION INDIVIDUAL SELF-CERTIFICATION

## 注意事項

書類は全て、英語表記で記入して下さい。  
署名は、直筆、RL360社登録のサインをして下さい。  
(サインが異なる場合、書類は受付不可となります)  
人数分の提出が必要のため、第二名義人がある場合、**第二名義人のAEOI書類を別途ご提出下さい。**  
保険会社の判断により、書類の再提出を求められることもあります。

## INSTRUCTIONS FOR COMPLETION

Under Tax Regulations and intergovernmental agreements entered into by the Isle of Man in relation to the automatic exchange of information for tax matters (collectively "AEOI"), RL360 is required to collect information about each policyholder's tax status.

Please complete all sections below and provide any additional information or certified documentation as directed.

Each individual policyholder or controlling person is required to complete a separate Self-Certification form\*.

Please note that in certain circumstances the information you provide may be disclosed to the Isle of Man Income Tax Division who in turn may exchange this information with tax authorities in other jurisdictions.

If any of the information that you provide changes in the future, you must advise us of these changes by completing a new Individual Self-Certification form.

If you are unsure how to complete this form, please contact your financial adviser or contact us on +44 (0)1624 681 681.

When you have completed this form, please send your Self Certification to us by email, fax or post.

- Scan and email to [csc@rl360.com](mailto:csc@rl360.com)
- Fax to +44 (0)1624 677 336
- Post to: RL360, International House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

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## POLICYHOLDER/TRUSTEE/CONTROLLING PERSON INFORMATION

RL360 policy number	証券番号 例: RS000XXXX または QN000XXXX の証券番号
Your full name	契約者氏名 例: TARO NIPPON
Your role(s)/relationship(s) on the policy*	契約プランとの関係 例: Policy holder (名義人) または Second policy holder (第二名義人)
Date of birth (dd/mm/yyyy)	2 3 0 3 1 9 8 0 生年月日 (日/月/年の順番で記入して下さい)
Residential address	居住地住所 例: 1-2-3, Nihonbashi, Chuo-ku, Tokyo, Japan Post code: 123-4567 (登録住所と異なる住所の場合、住所更新/変更手続きを行う必要があります)
Mailing address (if different from above)	郵送先住所 (書類郵送先が、居住地住所と異なる場合のみ記入) 例: 4-5-6, Nihonbashi, Chuo-ku, Tokyo, Japan, Post code: 456-789
Email address	Eメールアドレス 例: nippon.taro@abc123def.com
Country of birth	出身国 例: JAPAN

\* Are you an individual/joint policyholder, a trustee or controlling person? Please refer to our Automatic Exchange of Information (AEOI) definitions for further information.

## 02 DECLARATION OF U.S. CITIZENSHIP OR U.S. RESIDENCE FOR TAX PURPOSES (PLEASE GO TO SECTION 3 IF YOU ARE A NON-US RESIDENT FOR TAX PURPOSES).

※アメリカ国民でない場合、記入は不要となります。第3項へ進んで下さい。

Please tick either (a) or (b) or (c) and complete as appropriate.

- a) ☐ I confirm that I am a U.S. citizen and/or resident in the U.S. for tax purposes (green card holder or resident under the substantial presence test) and my U.S. federal taxpayer identifying number (U.S. TIN) is as follows:  
a) 私はアメリカ国民、もしくはアメリカに税金を払う義務がある（グリーンカード、または実質滞在テスト中の方）
- b) ☐ I confirm that I was **born** in the U.S. (or a U.S. territory) but am no longer a U.S. citizen as I have voluntarily surrendered my citizenship as evidenced by the attached documents. b) 私はアメリカ生まれですが、アメリカ国籍を破棄しましたので、アメリカの国民ではありません
- c) ☐ I confirm that I am currently renouncing my U.S citizenship and have evidenced this in the form Certified copy of my DS-4083 form (otherwise known as CLN for Certificate of Loss of Nationality) and/or a certified copy of my passport in which I am obtaining new citizenship.  
c) 現在、私はアメリカの国民ですが、国籍変更手続き中です（国籍変更書類【DS-4083】、または新しいパスポートのコピーを提出してください）

## 03 DECLARATION OF TAX RESIDENCY (OTHER THAN U.S.)

I hereby confirm that I am a tax resident in the following countries. (Please state all countries in which you are tax resident along with your tax identification number).

Country/countries of tax residency	Taxpayer Identification Number (TIN) or functional equivalent (e.g. social security, national insurance, personal identification, resident registration number.)	Reference Number Type (e.g. TIN, Social Security Number, Resident Number, National Insurance Number)
納税国 例: JAPAN		マイナンバー番号 例: 1234 5678 9012
		マイナンバー番号は必ず記入して下さい

If you are unable to provide a Taxpayer Identification Number or functional equivalent, you must specify your reason(s) here:

## 04 DECLARATION AND SIGNATURE

I declare that all the information provided in this Individual Self-Certification form is, to the best of my knowledge and belief, correct and complete.

I understand that I must complete a new Individual Self-Certification form where the information stated on this form is no longer valid due to a change in my tax status.

I am aware that RL360 may be required to share this information with the Isle of Man Income Tax Division.

Signature

署名

**プラン名義人署名**  
署名は全て直筆、RL360社の登録署名

Date (dd/mm/yyyy)

※第二名義人がいる場合は、第二名義人のAEOI書類が必要となります

The term "tax regulations" refers to regulations created that enable Automatic Exchange of Information (AEOI). This includes the Foreign Account Tax Compliance Act (FATCA), various agreements entered into between the UK, the Crown Dependencies and the Overseas Territories as well as the OECD's Common Reporting Standard (CRS) for Automatic Exchange of Financial Account Information. Such agreements have been adopted between International Governments with the aim to improve International Tax Compliance.