

# Morgan Stanley (Switzerland) GmbH

c/o Morgan Stanley & Co. International plc, London, Zurich Branch

Beethovenstrasse 33

8002 Zurich

Switzerland

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## Request for Information

Following a thorough strategic review, Morgan Stanley decided to sell its Private Wealth Management business activities in Switzerland and wind down its business activities in Switzerland.

Former clients and other stakeholders of Morgan Stanley (Switzerland) GmbH (formerly Bank Morgan Stanley AG respectively Morgan Stanley (Switzerland) AG) may request information using this form.

### Information Request Details:

Name of Requestor : \_\_\_\_\_

Account Number(s) : \_\_\_\_\_

Name of Account Holder(s) : \_\_\_\_\_

Domicile Address of Account Holder(s) : \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Shipping Address : \_\_\_\_\_

(if different from Domicile Address)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Telephone Number : \_\_\_\_\_

Date : \_\_\_\_\_

Name(s) : \_\_\_\_\_

Authorised Signature(s) : \_\_\_\_\_

Account Role or Function : \_\_\_\_\_

**Request for:**

Request type		Date range	
Account / Portfolio Statement	<input type="checkbox"/> monthly	From:	To:
Tax Statement	<input type="checkbox"/> Swiss Tax <input type="checkbox"/> German Tax <input type="checkbox"/> Final Withholding Tax – Austria Annual Reporting Certificate <input type="checkbox"/> Final Withholding Tax – UK Annual Reporting Certificate	From:	To:

**Request for other Documents or Information (please provide a date range):**

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**Required Documents:**

For representatives, including individuals formerly appointed as power of attorney holders:

- Current power of attorney signed by the Account Holder, not older than 30 days
- Passport copy of all individuals who signed this request form

In case of a corporate account, kindly include the following documents:

- Board resolution appointing and / or Corporate Register Extract identifying any Director signing this request form, not older than 30 days
- Passport copy of all individuals who signed this request form

**Request Submission:**

Please send this request form including supporting documents to the following address:

KPMG AG Data Agent Services Räffelstrasse 28 CH-8045 Zurich Switzerland
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**Please ensure that all information on this request is complete and all necessary signatures are available on this form. In case of any missing information, the request cannot be processed.**

By signing this form you understand and agree as follows:

1. Morgan Stanley (Switzerland) GmbH may charge you for the work conducted in order to reply to your request based on the amount of time and costs involved.
2. All letters and documents will be provided by non-registered mail to your Domicile Address unless you provide a different Shipping Address in the Information Request Detail section of this form.
3. This document is governed by the substantive laws of Switzerland. The exclusive place of jurisdiction for any and all disputes arising under or in connection with this document shall be the courts Zurich, Switzerland, venue being Zürich 1.