



# Individual Certification Form



**This form to be completed by:**

- individuals whose citizenship, residency and tax declaration are **not** provided on the application form (complete a separate form for each individual).

This form is for Accelerator Cash Account, Investment Loan and CALIA+ clients. We're asking these questions as part of our obligations under the Foreign Account Tax Compliance Act (FATCA).

## Section 1 – Client Details

Given Name/s

Surname

Company/Trust Name

Existing Product Details (complete one only)

**Accelerator Cash Account**

BSB

Account Number



**Investment Loan**

Loan Number

**CALIA+**

Facility Number

## Section 2 – Individual and Joint Client Status

### Countries of Residence (mandatory)

In which country(s) do you reside in or are a resident of? You **must** tick at least one box.

Australia

Country(s) other than Australia. Please list country(s)




### Countries of Tax Residence (mandatory)

Which country(s) are you required / liable to pay tax or submit a tax return? You **must** tick at least one box.

Australia

Country(s) other than Australia

Please list the country(s) and the Tax Identification Number or Exemption Code (refer to 'Tax Identification Number (TIN)' Explanatory Note in Application Form)

Country

Tax Identification No.



Country

Tax Identification No.



Country

Tax Identification No.



### Countries of Citizenship (mandatory)

In which country(s) do you hold citizenship? You **must** tick at least one box.

Australia

Country(s) other than Australia. Please list country(s)




## Section 3 – Client Declaration

I declare that the information I have provided on this form is true and correct and that I will inform CommSec Adviser Services immediately if any details change.

I consent to the collection, use and exchange of my personal information as set out in the terms and conditions of the product(s) I have applied for.

### Client Signature

DD / MM / YYYY