

Individual Tax Residency Self-Certification Form

Form ID: 7037

Where to send this form?

Please provide your completed and signed form with any relevant supporting documents to your adviser.
Adviser use only: Use this Form ID to securely submit the documents via eSubmit. To use eSubmit, log into the CommSec Adviser Services website and go to: **Administration > eSubmit**



Guide to completing this form

All customers are required by law to provide details of their country/ies of tax residency to their bank so these can be passed back to the relevant tax authority.

Please complete the following sections: **Personal Details, Tax Residency Information and Customer Declaration.**

Section 1 Personal Details

Complete all fields (Use clear BLOCK letters)

Title Mr Mrs Miss Ms Other

Full given name(s) Surname

Date of birth

Residential address (PO Box is not acceptable)
 State Postcode

Section 2 Tax Residency Information

Tax Residency and Tax Identification Number (TIN)

Each country has different rules which govern tax residency. For Individuals, these rules are often based on whether your home is there, the time you spend there, or if you work there. If you are unsure about your tax residency, you should seek professional advice. (You can be tax resident of more than one country.)

List all your countries of tax residency and your TIN for that country or if no TIN is available, please select a reason code. If you are a US citizen or resident, you must include US as one of your countries of tax residency.

Tax Residency Information	Country/ies of Tax Residency Please provide all country/ies of tax residency.	Tax Identification Number (TIN) Please provide either TIN or select Reason Code for no TIN for each Country of Tax Residency. Reason code for no TIN A. My country of tax residency does not issue TINs B. I have not been issued with a TIN by my country of tax residency C. My country of tax residency does not require disclosure of a TIN

If you have listed Australia as a country of tax residency, please insert reason code C (My country of tax residency does not require disclosure of a TIN), as this is optional for Australia.

Section 3 Declaration

Customer Declaration

- I confirm that above information is true and correct and that I will promptly advise the Bank if the information changes.
- I certify that I am the named person or am authorised to provide this information on their behalf.

Name Of The Person Signing

Signature

Date

Section 4 Definitions

“Tax Identification Number(s)” If you are a tax resident of another country, you will be asked for your Tax Identification Number (TIN) issued to you in that country, if you have one.

TIN is an international term which may have a different name in some countries.

A compilation of links to information about TINs for many countries can be found here: <http://www.oecd.org/tax/automaticexchange/crs-implementation-and-assistance/tax-identification-numbers/#d.en.347759>

Examples are Tax File Number (TFN) in Australia, Social Insurance Number (SIN) in Canada, Unique Taxpayer Reference (UTR) or National Insurance Number (NINO) in United Kingdom, Permanent Account Number (PAN) in India, IRD Number in New Zealand, and Tax Reference Number (TRN) in Malaysia.



Where to send the completed form?

Once completed and signed, please return the form by the eSubmit instructions provided on page 1.