

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

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

This form uses JavaScript for optimal performance. Please ensure you have this enabled if completing electronically.

Please refer to the end of this document for submission instructions and [explanatory notes](#).

## 1. Personal Details

Application Reference Number **OR** Account Number

Mr
  Ms
  Mrs
  Miss
  Dr
  Other

First name	Middle name/s	Surname	Date of birth – DD / MM / YYYY
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

Residential address – *Cannot be a PO box*

Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

## 2. Tax Residency Information

### Instructions for completion:

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.

- List all your countries of tax residency and your TIN for that country or 'Reason Code' if no TIN is available.
- If you are a US citizen or resident you must include USA as a country of tax residency.
- If you list Australia as a country of tax residency, select 'Reason Code' C in the TIN column.

For further instructions on how to complete this section see [explanatory notes #1](#) at the end of this application.

Country/ies of Tax Residency		Tax Identification Number (TIN)					
List all country/ies of tax residency.		1. Provide either TIN; OR 2. Select a 'Reason Code' if no TIN: A. My country of tax residency does not issue TINs B. I haven't been issued with a TIN by my country of tax residency C. My country of tax residency doesn't require disclosure of a TIN					
1	<input type="text"/>	TIN: <input type="text"/>	<b>OR</b>	Reason Code:	<input type="radio"/> A	<input type="radio"/> B	<input type="radio"/> C
2	<input type="text"/>	TIN: <input type="text"/>	<b>OR</b>	Reason Code:	<input type="radio"/> A	<input type="radio"/> B	<input type="radio"/> C
3	<input type="text"/>	TIN: <input type="text"/>	<b>OR</b>	Reason Code:	<input type="radio"/> A	<input type="radio"/> B	<input type="radio"/> C

### 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.

Full name  Date – DD / MM / YYYY  
 /  /

Signature – *Must be signed pen to paper*

### Explanatory Notes

#### 1. Tax Identification Number (TIN)

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/>

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.

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### How to submit your documents

Once completed and signed, email or send the form and relevant supporting documentation to

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Australia Square NSW 1215

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🌐 [commsec.com.au](http://commsec.com.au)