

i Financial Institutions are required by law to collect information about your tax residency. 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 [Definitions](#).

Section 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 style="width: 95%; height: 25px;" type="text"/>	<input style="width: 95%; height: 25px;" type="text"/>	<input style="width: 95%; height: 25px;" type="text"/>	<input style="width: 20%; height: 25px;" type="text"/> / <input style="width: 20%; height: 25px;" type="text"/> / <input style="width: 20%; height: 25px;" type="text"/>

 Residential address – *Cannot be a PO box*

Suburb	State	Postcode
<input style="width: 95%; height: 25px;" type="text"/>	<input style="width: 95%; height: 25px;" type="text"/>	<input style="width: 95%; height: 25px;" type="text"/>

Section 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. For more information please visit the US State Department's Joint FATCA FAQs at <https://travel.state.gov/content/travel/en/international-travel/while-abroad/Joint-Foreign-Account-Tax-Compliance-FATCA-FAQ.html>
- If you list Australia as a country of tax residency, select 'Reason Code' C in the TIN column.
- If you are listing more than three (3) countries of tax residency, please append an additional page containing these details.

For further information on Tax Identification Numbers (TINs), Refer to [Definitions](#) at the end of this form.

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	TIN:	<input style="width: 95%; height: 25px;" type="text"/>	OR	Reason Code: <input type="radio"/> A <input type="radio"/> B <input type="radio"/> C
2	TIN:	<input style="width: 95%; height: 25px;" type="text"/>	OR	Reason Code: <input type="radio"/> A <input type="radio"/> B <input type="radio"/> C
3	TIN:	<input style="width: 95%; height: 25px;" type="text"/>	OR	Reason Code: <input type="radio"/> A <input type="radio"/> B <input type="radio"/> C

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.

Full name Date – DD / MM / YYYY
 / /

Signature – *Must be signed pen to paper*

Definitions

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, Social Security Number (SSN) in the United States 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:

✉ shares@commsec.com.au

📍 CommSec
Locked Bag 22
Australia Square NSW 1215

📞 13 15 19
🌐 commsec.com.au