

FOREIGN TAX RESIDENT CERTIFICATION - PERSONAL FORM



Personal Information

Title Mr Ms Mrs Miss

First names _____

Surname _____

Heritage member no _____

Foreign Tax resident certification

Information on tax residency for FATCA and OECD CRS reporting (explanation available on the Australian Taxation Office website at <https://www.ato.gov.au/individuals/international-tax-for-individuals/in-detail/foreign-residents-reporting/foreign-tax-resident-reporting/>)

A reply to the following question is mandatory

Are you a tax resident of any country other than Australia? YES (Please complete the "Resident of a Foreign Country" section below)
 NO (Skip next section and complete the "Declaration" below)

CRS-details: Resident of a foreign country

	Country / Jurisdiction of Tax residence	TIN (Taxpayer Identification Number)	If no TIN available, select reason: A The country/jurisdiction where the Account Holder is resident does not issue TINs B Unable to provide to the bank due to the law by country/Jurisdiction of tax residence C Unable to obtain a TIN or equivalent (please state reason why)
1		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
2		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
3		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C

If more than 3 countries are selected, please call our Contact Centre on 13 14 22

Declaration

In signing I declare:

- that the information provided in this form is correct and reflects my tax residency status;
- that I will update Heritage immediately if my tax residency status is to change in the future.

I acknowledge that the information contained in this form and information regarding the Account Holder and any Reportable Account(s) may be provided to the Australian Taxation Office and exchanged with tax authorities of another country/jurisdiction or countries/jurisdictions in which the Account Holder may be tax resident pursuant to intergovernmental agreements to exchange financial account information.

Signature: _____