

Please note where there are joint clients, one form per individual is required

The Australian Government has entered into a multi-lateral agreement between nations to exchange income information about account holders who are residents in one jurisdiction and earn investment income in another. Under this agreement Bell Potter Online is required to collect, identify and report to the Australian Taxation Office (ATO) information relating to our account holders. The ATO will exchange the information reported to them with the relevant jurisdiction. In order to comply with this, we require you to complete this form.

Tax Residency rules differ by country. Whether an individual is tax resident of a particular country is often (but not always) based on the amount of time a person spends in a country, the location of a person's residence or place of work. For the US, tax residency can also be as a result of citizenship or residency. Collection of tax status is in accordance with the United States Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS).

Account Name	Account Number
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## SECTION 1 - COUNTRY OF TAX RESIDENCY

Please answer both residency questions:

Is the individual a tax resident of Australia? Yes  No

Is the individual a tax resident of another country? Yes  No

If the individual is a tax resident of a country other than Australia, please provide their tax identification number (TIN) or equivalent below. If they are a tax resident of more than one other country, please list all relevant countries below.

A TIN is the number assigned by each country for the purposes of administering tax laws. This is the equivalent of a Tax File Number in Australia or an Employer Identification Number in the US. If a TIN is not provided, please list one of the three reasons specified (A, B or C) for not providing a TIN.

1. Country	TIN	If no TIN, list reason A, B or C
2. Country	TIN	If no TIN, list reason A, B or C
3. Country	TIN	If no TIN, list reason A, B or C

If there are more countries, provide details on a separate sheet and tick this box.

Reason A The country of tax residency does not issue TINs to tax residents

Reason B The individual has not been issued with a TIN

Reason C The country of tax residency does not require the TIN to be disclosed

## SECTION 2 - CERTIFICATION

I declare that the information I have provided on this form is, to the best of my knowledge and belief, correct and complete. I acknowledge that I must re-certify if any of the information on this form changes or becomes invalid.

Signature	Date (dd/mm/yyyy)
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