

# Foreign tax status declaration - Individual

**WealthHub Securities Limited**  
ABN 83 089 718 249  
AFSL No. 230704

nabtrade  
Reply Paid 87762  
Melbourne VIC 8060

Telephone 13 13 80  
nabtrade.com.au

Account number

Reference number

## Section 1

### What you should know before completing this form

This form has to be completed to confirm your foreign tax status. This means you **must complete Section 3**.

We're required to report information on your account to the Australian Taxation Office (ATO), who in turn will report this to the relevant tax authorities if:

- you're a tax resident of a country other than Australia, or
- you don't **complete Section 3**.

## Section 2

### Personal details

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

First name

Middle name

Family name

Date of birth (DD/MM/YYYY)

Residential address (PO Box is **not** acceptable)


## Section 3

### Tax Status

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 be as a result of citizenship or residency.

Please answer **the below** tax residency questions:

**Is the individual a tax resident of a country other than Australia?**

☐ 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 a Social Security 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.

# Foreign tax status declaration - Individual



## Section 3

### Tax Status (cont.)

#### 1st Country

Country

TIN

If no TIN, list reason A, B or C. If B, provide a brief description why.

#### 2nd Country

Country

TIN

If no TIN, list reason A, B or C. If B, provide a brief description why.

#### 3rd Country

Country

TIN

If no TIN, list reason A, B or C. If B, provide a brief description why.

**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 4

### Signatures

By completing and signing this declaration, I certify that the information I have provided is true and correct.

#### Signature of applicant

Name

Signature

Date

## Section 5

### Send us your form

Please complete, sign and return this form and any attachments to:

#### Email

forms@nabtrade.com.au

#### Post

nabtrade  
Reply Paid 87762 Melbourne VIC 8060

**Need Help?** If you need any assistance with completing this form, contact us on **13 13 80**. For more information about our opening hours visit **nabtrade.com.au**