

Foreign tax status declaration - Individual

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Account number

Reference number

WF

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.

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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
Fax 1300 368 758

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**