

Confirmation of tax information

Individuals

Important information

This form must be mailed to: **Acenda, GPO Box 3306, Sydney NSW 2001**
Contact phone number: **13 57 22** between 9am and 5pm (AEST/AEDT), Monday to Friday, excluding public holidays.
Or on **+618 7223 2523** from outside Australia.

Please note:

The individual may be treated as being a non-Australian taxpayer if the requested information is not provided.

Guide to completing this form

- This form is designed to collect the tax status of an individual where this information has not previously been provided or the individual has been identified as a potential taxpayer of a country other than Australia.
- Complete one form for each individual. Complete all applicable sections of this form in BLOCK LETTERS.
- Tax information must be collected from the individual.
- Contact your licensee if you have any queries.

Section 1 – Personal details (all fields must be completed)

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other Member number

Given name(s) Surname

Residential address

State Postcode Country

Postal address

State Postcode Country

Mobile number Alternate phone number Date of birth (dd/mm/yyyy)

Email address

Section 2 – Tax information

Tax residency rules differ by country. Whether an individual is a 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 both tax residency questions:	Are you a tax resident of Australia?	☐ Yes ☐ No
	Are you a tax resident of another Country?	☐ Yes ☐ No

Please note: If you are a tax resident of a country other than Australia, please provide your Tax Identification Number (TIN) or equivalent below. If you are a tax resident of more than one other country, please list all relevant countries below.

Section 2 – Tax information (continued)

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.

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 3 – Declaration and acknowledgment

By signing this form I declare as follows:

- The answers to all questions, declarations and all information supplied by me is true and correct.
- I will promptly advise Resolution Life if these details change.
- I certify that I am the named person above or authorised to provide information on their behalf.
- I am aware that information provided about me and my accounts may be provided to the relevant tax authorities.

Individual declaration (the person named in this form)

Name

Signature

Date (dd mm yyyy)

What you need to know

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