

Confirmation of tax information Individuals

Important information

This form must be mailed to: **Resolution Life, GPO Box 3306, Sydney NSW 2001**

Contact phone number: **133 731** between 9 am and 5 pm (AEST/AEDT), Monday to Friday, excluding public holidays.
Or on **+61 2 7202 0216** 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	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/> Other	<input type="text"/>	Member number	<input type="text"/>
Given name(s)						Surname		
<input type="text"/>						<input type="text"/>		
Residential address								
<input type="text"/>								
			State	Postcode	Country			
Postal address								
<input type="text"/>								
			State	Postcode	Country			
Mobile number			Alternate phone number			Date of birth (dd/mm/yyyy)		
<input type="text"/>			<input type="text"/>			<input type="text"/>		
Email address								
<input type="text"/>								

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	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="text"/>
2.	Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="text"/>
3.	Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="text"/>

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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