

AUTOMATIC EXCHANGE OF INFORMATION FOR INDIVIDUAL SELF-CERTIFICATION

(Please complete in full and tick where appropriate)

TAX RESIDENCY AND FOREIGN TAX INFORMATION

Under New Zealand law, FNZC must collect a self-certification from you about your tax residency status. FNZC must provide your information (even if you refuse to give information or a declaration) to Inland Revenue, who may share that information with overseas tax authorities under international agreements.

You must complete this self-certification form and return it to FNZC if you're an individual (including sole traders) with an FNZC account. Where two or more individuals jointly hold an FNZC account, each individual must complete a separate self-certification.

If you are unsure how to complete this form or do not understand the consequences of not providing the correct information, please seek advice from a tax professional, lawyer, or other adviser before you complete this form.

SECTION 1. ACCOUNT HOLDER DETAILS

First or given name(s) _____	Residential address (Not a PO Box) _____
Middle Name(s) _____	_____
Family name or Surname(s) _____	_____
Date of birth _____	_____
Country of birth _____	_____
Account number (if known) _____	_____

SECTION 2. ACCOUNT HOLDER TAX RESIDENCE(S)

I confirm:

- I am only a tax resident in New Zealand (go to section 3). OR
 I am a tax resident of one or more countries other than New Zealand and I have listed all these below.
(Please note, United States of America Citizens are considered to be tax residents of the United States of America).

	Country of tax residence 1	Country of tax residence 2	Country of tax residence 3
List all countries of tax residence (other than New Zealand)	_____	_____	_____
List Tax Identification Number (TIN) (or country equivalent)	_____	_____	_____
OR Reason if TIN is not provided	<input type="checkbox"/> A - Country doesn't issue TIN <input type="checkbox"/> B - Country doesn't require TIN collection <input type="checkbox"/> C - Applied for TIN, and will provide soon <input type="checkbox"/> D - Cannot obtain TIN (explain below)	<input type="checkbox"/> A - Country doesn't issue TIN <input type="checkbox"/> B - Country doesn't require TIN collection <input type="checkbox"/> C - Applied for TIN, and will provide soon <input type="checkbox"/> D - Cannot obtain TIN (explain below)	<input type="checkbox"/> A - Country doesn't issue TIN <input type="checkbox"/> B - Country doesn't require TIN <input type="checkbox"/> C - Applied for TIN, and will <input type="checkbox"/> D - Cannot obtain TIN (explain below)
AND If Reason D, explanation for not being able to obtain TIN	_____	_____	_____

SECTION 3. DECLARATION

I have the authority to provide the information in this self-certification form, which is true and complete. I understand that not giving information or giving false information could be serious under New Zealand law. I understand FNZC may need extra information from me about my tax residency status, and I will provide any extra information FNZC requests. I will also contact FNZC if any information I've given changes.

Signature _____	Capacity (Please indicate the capacity in which you are signing the form, for example, account holder, authorised person.) _____
Name (Please print first and last name) _____	_____
_____	Date _____

We take your privacy seriously and understand the need to keep your information confidential and secure. You can access or correct information we have about you – we may charge you a fee for access. We can also collect, use, and disclose information about you. We do this, among other things, to manage accounts, products, or services we offer or to comply with laws. Talk to us if you need more information about our full rights to collect, use, and disclose information about you.