

# Tax File Number Declaration Form

Fields marked with an asterisk (\*) must be completed in order for us to action your request.

The information collected on this form is governed by the ClearView Information Handling policy which is available on [www.clearview.com.au](http://www.clearview.com.au).

## A. Investor and Joint Investor details

My ClearView Managed Investments account, or

My ClearView Savings Bond account

\*My account number  /  (e.g. TSAV / 100000)

\*My account number  /  (e.g. TINV / 100000)

\*Title (Investor)

Mr  Mrs  Ms  Miss  Dr  Other

\*Gender

Male  Female

\*Date of birth

\*Given name(s)

\*Surname

\*Title (Joint Investor)

Mr  Mrs  Ms  Miss  Dr  Other

\*Gender

Male  Female

\*Date of birth

\*Given name(s)

\*Surname

\*Account name (for Company, Trusts or Partnerships)

## B. Tax File Numbers (TFN)/Australian Business Numbers (ABN) or exemption

Please refer to section titled 'Tax File Numbers (TFN)/Australian Business Numbers (ABN)' in the ClearView Managed Investments SPDS for information about quoting your TFN/ABN.

Is the Investor a tax resident of Australia?  Yes  No

Tax File Number (Investor 1)

-  -

Tax File Number (Investor 2)

-  -

Exemption Code (if applicable)

Exemption Code (if applicable)

Company/Trust/Partnership/Trustee of a Superannuation fund

Tax File Number

-  -

ABN

-  -  -

If you are not a resident of Australia for tax purposes, please complete the section below:

Tax Residency rules differ by country. For the US, tax residency can be as a result of citizenship or residency.

Is the Investor a tax resident of another Country?  Yes  No

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If the Investor 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.

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

