



Confirmation of tax information

INDIVIDUALS

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
- PLEASE NOTE: The individual may be treated as being a non-Australian taxpayer if the requested information is not provided.
- Contact your licensee if you have any queries.

SECTION 1: PERSONAL DETAILS

Surname

Date of Birth (dd/mm/yyyy)

Full Given Name(s)

Residential Address (PO Box is not acceptable)

Street		
Suburb	State	Postcode
Country		

Email

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

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.

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

Important note:

- Complete the Declaration section below

I declare that:

- The answers to all questions, declarations and all information supplied by me is true & correct
- I will promptly advise AIA Australia 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

Please mail this form to: AIA Australia, GPO Box 3306 Sydney NSW 2001
Contact phone number: **1800 624 100** or **+ 61 2 8365 9126** between 8.30am and 6pm, Monday to Friday (AEST/AEDT).