



# Tax Self-Certification Form - Individual



## Personal Details

Title    Mr     Mrs     Miss     Ms     Other (please state)

Forename(s)

Surname (and previous names)

Residential Address

Mailing Address (if different from registered address)

Date of birth (DD/MM/YYYY)

Country and place of birth

Nationality(ies) (Please disclose all)

## Tax residency

Tax Regulations<sup>1</sup> require us to collect information about your tax residency. In certain circumstances (including if we do not receive a valid self-certification from you) we will be obliged to share information about your financial interests with any relevant tax authority.

Please list all the countries in which you are resident for tax purposes, your tax advisor can explain what this means. If you have been given a Tax Identification Number (TIN) by your local tax authority, please provide this. If you are UK resident please provide your National Insurance Number in place of your TIN. Otherwise provide some other official registration which will assist us in identifying you.

Country(ies) of Tax Residency

Tax Identification Number

Please note, if you are a US citizen you are treated as tax resident in the US even if you are resident in another country, therefore you may be resident in more than one country.

Please state your country of domicile

Do you have, or have you ever held, a US Green Card    Yes     No





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Please add any additional comments below:

## Declaration

I declare that the information provided on this form is, to the best of my knowledge and belief, accurate and complete. I agree to notify you within 30 days if any of this information changes in the future. I hereby consent to you disclosing information contained herein to third parties, including relevant tax authorities.

Name (please print in full)

Signature

Date

If signing under a Power of Attorney (PoA) please attach a certified copy.

<sup>1</sup>The term 'tax regulations' refers to regulations created to enable automatic exchange of information and includes FATCA<sup>2</sup> and CRS<sup>3</sup>.

<sup>2</sup>The term 'FATCA' refers to the foreign account tax compliance provisions contained in the US Hire Act 2010.

<sup>3</sup>The Common Reporting Standard (CRS) is an information standard for the Automatic Exchange Of Information (AEOI) as developed by the OECD.

**If you wish to sign electronically, please email the completed form to your contact at Oak who will send back via DocuSign for electronic signature.**

We may use the information you send us together with other information, which comes from or relates to you, to discharge our functions effectively. This may include us sharing the information we hold about you with other bodies, such as regulators and law enforcement agencies, some of whom may be located outside of The Crown Dependencies, Mauritius and the European Economic Area. Data Protection legislation provides you with various rights, including the right to ask for a copy of the information we hold on you, and the right to have inaccuracies corrected. To better understand your rights and how we handle your information, we would encourage you to read our Privacy Notice; or to contact the Data Protection Officer on [dataprotection@oak.group](mailto:dataprotection@oak.group)