

Tax Residency and Foreign Tax Information

Individual Self-Certification



Who needs to complete this form and why?

You'll need to complete this form under New Zealand law if you're an individual Bonus Bonds bondholder or a controlling person of an entity bondholder. A controlling person is someone with effective control over an entity, like a director or shareholder of a company or a trustee or beneficiary of a trust. If you hold a joint bondholding, each individual bondholder must complete their own Individual Self-Certification form.

New Zealand, and other countries around the world, have introduced laws that mean that financial institutions must collect tax residency information about their customers to help protect against global tax evasion. If you don't complete this form, or don't provide complete or correct information, the results may be serious. Under New Zealand law, fines may apply and we may not be able to open accounts for you, or we may need to freeze or close your accounts.

For more information, see anz.com/aeoi, ird.govt.nz/international/exchange, or search for the IR1033 factsheet at ird.govt.nz

What do we do with your information?

We may need to give your information to Inland Revenue (even if you refuse, or don't complete some or all of this form). Inland Revenue may share it with overseas tax authorities under international agreements.

If you're unsure how to complete this form please visit classic.ird.govt.nz/infoshare or talk to a tax professional, lawyer, or other adviser.

Section 1. Your Details as Account Holder (or Controlling Person if applicable)

Full name

First name(s)
Surname

Date of birth

Bondholding number

Residential address (do not provide a PO Box or in-care-of address)

Address
City/town
Province/state
Postal code/zip code
Country

Section 2. Your Tax Residence Details

Tick one option that applies to you:

- I am a tax resident in New Zealand only. **Go to Section 3.**
- I am a tax resident of one or more countries other than New Zealand. **Complete the table below.**

The rules on whether you are a tax resident vary between countries, and are usually based on whether you work or live in a country. In some circumstances, you may be a tax resident in more than one country at the same time. If you're a US citizen, you're considered to be tax resident in the United States of America.

If you are a tax resident in countries other than New Zealand, list them along with your Tax Identification Number (TIN) in the table below.

If you are unable to provide a TIN for any country, select a reason using the list below and tick the relevant box in the table below.

- | | |
|--|---|
| A: TINs are not issued by this country | B: This country does not require me to provide my TIN |
| C: I have applied for a TIN and will inform you immediately upon receipt | Q: This country has not issued a TIN to me |

	Country of tax residence	TIN	If no TIN provided, tick reason A, B, C, or Q
1.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> Q
2.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> Q
3.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> Q

Need help working out what your TIN is? It's a combination of letters or numbers issued by tax authorities or other agencies, and used to identify you for tax purposes in your country of tax residence. For what this may mean in your country search 'TIN' on oecd.org

Tax Residency and Foreign Tax Information (continued)

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Section 3. Your Declaration

As an account holder or controlling person, you confirm and declare:

- You have authority to provide the information in this form and the information is true and complete.
- You understand that if you don't give information, or give false information, it could be serious under New Zealand law.
- You'll provide any extra information we need about your tax residency status, if asked.
- You'll contact us if any of the information you've given in this form changes.
- If another person completes this form and signs this declaration for you they have the authority to do so, and you'll provide evidence, if asked, of their authority.

Name (please print first and last name)

Date

Signature

If you have been asked to complete this form as a Controlling Person of an entity please write the name of the entity below:

BANK USE ONLY

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. For more information about how we can collect, use, and disclose information about you, including from this form, please see our [Privacy Statement](#) at [anz.co.nz](#)