

### Why do I have to provide Self-Certification?

Please provide us with details about your residency status for taxation purposes. This will help us comply with our compliance obligations under taxation laws including the Common Reporting Standard (CRS) and the US Foreign Account Tax Compliance Act (FATCA). The information also ensures compliance with non-resident withholding tax requirements and Anti-Money Laundering (AML) legislation. Please complete a separate Self-Certification form for each applicable account holder or controlling person.

### A. Tax Residency

Your tax residency usually relates to the country or countries in which you have to lodge a tax return, which in most circumstances is a jurisdiction where you live and work. However, if a person is required to file a tax return or pay tax in a jurisdiction, they are likely to be a tax resident there.

For more information on tax residence, we advise you to consult your tax advisor or seek guidance from the ATO website; [ato.gov.au](http://ato.gov.au).

### B. Account Holder Details

Title Mr  Mrs  Miss  Ms  Mx

Surname  Given Names

Date of Birth  /  /  Residential Address

State  Postcode  Country

Postal Address (if different from above)

State  Postcode  Country

### C. Self-Certification – Tax Residency

1. Are you a resident for tax purposes only of Australia? Yes  No  If **yes**, proceed to Section – **D. Declaration** otherwise go to next question.

2. Are you a United States citizen or resident for U.S. tax purposes? Yes  No   
(If Yes, please provide Social Security Number below in Question 4 - TIN)

3. Are you a resident for tax purposes of another country other than Australia? Yes  No  If **yes**, please provide details below

Country 1

Country 2

Country 3

4. Do you have a foreign taxpayer identification number (TIN)?

Yes  Please provide TIN

No  Please provide written explanation as to why you do not have a TIN

### D. Declaration

I certify and declare that I am the Account Holder of all accounts to which this form relates and the information provided on this form including my TIN, is true and correct. I understand that providing false or misleading information may constitute an offence (including where the Account Holder has not provided a valid Self-Certification). I agree that I will advise Bank First within 30 days of any change in circumstances that affects my tax residency status or that causes any information provided on this form to become incomplete or inaccurate. I agree to provide Bank First with a new Self-Certification form in such circumstances. I acknowledge that Bank First may be required to provide this information to relevant tax authorities in accordance with the Bank's legal obligations (including where the Account Holder has not provided a valid Self-Certification). For US persons only: FATCA code exemptions do not apply and I confirm, as Account Holder, that backup withholding is not applicable.

Signature

Date  /  /