



Individual Customer Foreign Tax Information

In New Zealand financial institutions are required to identify and report United States (US) and other foreign tax residents to the NZ Inland Revenue Department (NZ IRD) for sharing with the relevant foreign tax offices.

For tax advice or advice on how to complete this form, please contact a qualified tax professional.

A. Customer details

Mr Mrs Miss Ms Other (please specify) Date of birth DD / MM / YYYY

Name FIRST MIDDLE LAST

Home Address NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

Postal Address (if different) NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

B. Foreign Tax Residency Information

All fields must be answered.

Are you a US citizen?* Yes No

Main country of tax residency** THIS IS THE MAIN COUNTRY WHICH HAS THE RIGHT TO TAX YOUR WORLDWIDE INCOME

Additional country(s) of tax residency (if any) LIST THE ADDITIONAL COUNTRY(S) OF WHICH YOU ARE A TAX RESIDENT

Foreign Tax Identification Number*** (TIN) YOUR IDENTIFICATION NUMBER FOR TAX PURPOSES IN A PARTICULAR COUNTRY

If you do not have a TIN, please select the reason: TIN not issued by this country
 Country has not issued a TIN to me (e.g. I am under age)

NOTE: We cannot open your account until we have received your TIN, unless one of the above reasons is applicable.

* You will be a US citizen if you were born in the US or have acquired US citizenship, unless you have formally renounced your US citizenship.

** The country listed will determine the tax rate applied to your products. Please contact your tax advisor if you are unsure.

*** If you are a US citizen or tax resident, the TIN section must be completed with your social security number or individual tax identification number.

C. Acknowledgement Privacy Statement

I certify/acknowledge that:

- all information supplied in this application is true, correct and complete;
- I have an obligation to notify Westpac of a change in circumstances that would affect the tax residency information provided;
- Westpac and its related companies may obtain, use and/or disclose information held about me/us to enable Westpac and its related companies to comply with any laws, rules or regulations in New Zealand or any other country including any laws, rules or regulations reasonably expected to be implemented (including to enable the government of New Zealand to comply with any agreement between it and other country).

Signature Date DD / MM / YYYY

Who do I contact about a change of circumstances?

Contact Foreign Tax Operations (contact details below). We may require you to complete this form again (depending on your circumstances).

Westpac Foreign Tax Operations
PO Box 934, Shortland Street, Auckland 1140
New Zealand

Please remember until the form has been completed and returned your account will not be opened.