

TAX RESIDENCY AND FOREIGN TAX INFORMATION

INDIVIDUAL SELF-CERTIFICATION



Under New Zealand law, ANZ must collect a self-certification from you about your tax residency status. ANZ must provide your information (even if you refuse to give information or a declaration) to Inland Revenue, who may share that information with overseas tax authorities under international agreements.

You must complete this self-certification form and return it to ANZ if you're an individual (including sole traders) with an ANZ account. Where two or more individuals jointly hold an ANZ account, each individual must complete a separate self-certification.

If you are unsure how to complete this form or do not understand the consequences of not providing the correct information, please seek advice from a tax professional, lawyer, or other adviser before you complete this form. For more information about why you need to complete this form, see www.anz.com/aeoi or www.ird.govt.nz/infoshare.

SECTION 1. ACCOUNT HOLDER DETAILS

Full name

First name(s)

Surname

Date of birth

Country of birth

Customer number (if known)

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. ACCOUNT HOLDER TAX RESIDENCE(S)

I confirm:

- I am only a tax resident in New Zealand (go to section 3). **OR**
- I am a tax resident of one or more countries other than New Zealand and I have listed all these below.
(Please note, United States of America Citizens are considered to be tax residents of the United States of America).

	Country of tax residence 1	Country of tax residence 2	Country of tax residence 3
List all countries of tax residence (other than New Zealand)			
List Tax Identification Number (TIN) (or country equivalent)			
OR Reason if TIN is not provided	<input type="checkbox"/> A – Country doesn't issue TIN <input type="checkbox"/> B – Country doesn't require TIN collection <input type="checkbox"/> C – Applied for TIN, and will provide soon <input type="checkbox"/> Z – Cannot obtain TIN (explain below)	<input type="checkbox"/> A – Country doesn't issue TIN <input type="checkbox"/> B – Country doesn't require TIN collection <input type="checkbox"/> C – Applied for TIN, and will provide soon <input type="checkbox"/> Z – Cannot obtain TIN (explain below)	<input type="checkbox"/> A – Country doesn't issue TIN <input type="checkbox"/> B – Country doesn't require TIN collection <input type="checkbox"/> C – Applied for TIN, and will provide soon <input type="checkbox"/> Z – Cannot obtain TIN (explain below)
AND If Reason Z, explanation for not being able to obtain TIN			

SECTION 3. DECLARATION

I have the authority to provide the information in this self-certification form, which is true and complete. I understand that not giving information or giving false information could be serious under New Zealand law. I understand ANZ may need extra information from me about my tax residency status, and I will provide any extra information ANZ requests. I will also contact ANZ if any information I've given changes.

Signature

Name (Please print first and last name)

Date

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. We can also collect, use, and disclose information about you. We do this, among other things, to manage accounts, products, or services we offer or to comply with laws. Talk to us if you need more information about our full rights to collect, use, and disclose information about you.