

Tax residency self-certification form for individuals

How to complete this form

Please complete all sections as directed. Once completed, you can email this to us at investorsupport@octopusinvestments.com, or post to: Octopus Investments Limited, PO Box 10847, Chelmsford CM99 2BU.

Section 1 – About the investor

Title	First name(s)	Last name
Date of birth (dd mm yyyy)	National Insurance number	Country of birth
Country(ies) of citizenship		
Nationality (if you hold dual nationality or are not a British national, we may contact you for further information)		
Telephone numbers Primary (include country code)		Secondary (include country code)
Email address		
Address		
Country	Postcode	

Tax residency status

We are legally required to collect information about the tax residency and classifications of each investor which may be shared with HM Revenue & Customs, and may be transferred to the government of another territory in accordance with a relevant agreement. For further information please visit octopusinvestments.com/reportingforms.

1.1 Are you a tax resident in any country outside the UK, or do you complete tax returns in any other country?

☐ No – please tick this box and go straight to **Section 2**.

If your country of birth or country of citizenship is outside of the UK, please send us a certified copy of a valid UK ID, such as a UK driving licence or passport, or a certified letter from HMRC, to confirm your UK tax residency status.

☐ Yes – please complete **1.2** below.

1.2 Please list the country(ies), other than the UK, in which you are resident for tax purposes

Please provide the Taxpayer Identification Number (TIN) or functional equivalent for each country(ies), or tick the relevant box if the country does not provide a TIN.

Country	Taxpayer Identification Number (TIN)	TIN not available
		☐
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		☐
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		☐
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		☐

Section 2 – Declaration

Investor declaration (to be completed by the investor named in **Section 1**, or registered Attorney(s))

I declare that to the best of my knowledge and belief, the information I have provided in this form is true, correct and complete.

I understand that the information contained in this form and any information about the Investor and their accounts may be reported to the tax authorities of the country in which these accounts are maintained. They may also be exchanged with tax authorities of another country or countries in which the Investor is a tax resident depending on the Intergovernmental Agreements (IGAs) that are in place.

Investor/registered Attorney signature

Print name

Date signed (dd mm yyyy)



0800 316 2295
investorsupport@octopusinvestments.com
octopusinvestments.com



Send completed form to:
Octopus Investments
PO Box 10847
Chelmsford CM99 2BU