

Tax residency self-certification form for Power of Attorney

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.**

We are required by UK law to collect information about the tax residency and tax classification status of our investors and Attorney(s). In certain circumstances it may be necessary for us to share this information with HM Revenue and Customs (HMRC), which is also obliged to share relevant information with tax authorities in other jurisdictions.

Please note, each Attorney should complete their own Self-Certification Form.

If you have any questions about tax residence or classification, we recommend that you contact your adviser.

Section 1 – About the Attorney

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	
Please provide the name and portfolio number(s) of the investor you are acting on behalf of		
Investor name		
Portfolio number(s)		

Tax residency status

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

Section 2 – Declaration

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 Attorney 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 Attorney is a tax resident depending on the Intergovernmental Agreements (IGAs) that are in place.

Attorney signature

Attorney name

Date signed (dd mm yyyy)



0800 316 2295
investorsupport@octopusinvestments.com
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Send completed form to:
Octopus Investments
PO Box 10847
Chelmsford CM99 2BU