

Tax Residency Self-Certification Form for Individuals

How to complete this form

- 1 Please complete all sections as directed.
- 2 Once completed please send to:

Octopus Investments Limited
PO Box 10847
Chelmsford
CM99 2BU

Octopus Investments is required by UK law to collect information about the tax residency and tax classification status of its investors. 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, joint holders should each complete a Self-Certification Form. You can either photocopy this form, download and print an additional copy from [octopusinvestments.com/reportingforms](https://www.octopusinvestments.com/reportingforms) or call our Client Relations Team on **0800 316 2295** who will send you one by post.

If you have any questions about tax residency, we recommend that you contact your adviser.

Section 1 – About the Investor

Title <small>(Mr/Mrs/Miss/Ms/Other)</small>	<input style="width: 100%;" type="text"/>		
First name(s)	<input style="width: 100%;" type="text"/>		
Last name	<input style="width: 100%;" type="text"/>		
Date of birth <small>DD MM YYYY</small>	<input style="width: 20px;" type="text"/>	<input style="width: 20px;" type="text"/>	<input style="width: 40px;" type="text"/>
Country of birth	<input style="width: 100%;" type="text"/>		
Country(ies) of citizenship	<input style="width: 40%;"/>	<input style="width: 60%;"/>	
Telephone numbers	<small>Country code</small>	<small>Telephone number</small>	
	Home:	<input style="width: 100px;" type="text"/>	<input style="width: 400px;" type="text"/>
	Work:	<input style="width: 100px;" type="text"/>	<input style="width: 400px;" type="text"/>
	Mobile:	<input style="width: 100px;" type="text"/>	<input style="width: 400px;" type="text"/>
Address	<input style="width: 100%; height: 20px;" type="text"/>		
	<input style="width: 100%; height: 20px;" type="text"/>		
Country	<input style="width: 450px;" type="text"/>	Postcode	<input style="width: 20px;" type="text"/>

Section 2 – Tax Residency status

- 2.1 Are you tax resident, or do you complete tax returns, in any country other than the UK?
- No – please go straight to **Section 3**.
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 the table below.
- 2.2 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(ies)	Taxpayer Identification Number (TIN)	TIN not available
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>

Section 3 – 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 name

Investor/registered Attorney signature

Date of signed
DD MM YYYY

Got a question?

We don't offer financial or tax advice, which is why we always recommend talking to a qualified financial adviser before making any investment decisions. However, if you have any other questions, please call us on **0800 316 2295**. We're always happy to hear from you.



0800 316 2295
clientrelations@octopusinvestments.com
octopusinvestments.com



Octopus Investments,
33 Holborn,
London EC1N 2HT