

Tax Residency Self-Certification Form for Power of Attorney

How to complete this form

Please complete all sections as directed. Once completed you can scan this to us at investorsupport@octopusinvestments.com, or 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 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 need another form, please visit octopusinvestments.com/reportingforms or call us on **0800 316 2295**.

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

Section 1 – About the attorney

Title (Mr/Mrs/Miss/Ms/Other)

First name(s)

Last name

Date of birth DD MM YYYY

National Insurance number

Country of birth

Country(ies) of citizenship

Telephone numbers

Country code

Telephone number

Home:

Work:

Mobile:

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)

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

Country(ies)

Taxpayer Identification Number (TIN)

TIN not available

Country(ies)

Taxpayer Identification Number (TIN)

TIN not available

Country(ies)

Taxpayer Identification Number (TIN)

TIN not available

Section 3 – Declaration

Investor declaration (To be completed by the attorney named in Section 1.)

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 name

Attorney signature

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

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