

# Self-Certification form for individuals

Client Name

Account Number(s) or Application Reference

## Tax status

Are you a US citizen?  Yes  No

List all countries where you are resident for tax purposes and provide your Tax Identification Number (TIN). A TIN is the tax reference number issued to you by the tax office in the country where you are resident for tax purposes. Where a country does not issue a TIN, complete an equivalent number, for example a social security, national insurance, personal identification or a resident registration number.

Country of tax residence	Tax Identification Number (TIN)	No TIN	Reason for no TIN
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

## Declaration

We explained how we use your personal data when you completed your application. Our Data Protection Notice can be found at:  
[https://www.investec.com/en\\_gb/legal/UK/data-protection-notice/private-bank.html](https://www.investec.com/en_gb/legal/UK/data-protection-notice/private-bank.html).

- 1) I acknowledge that Investec Bank plc may request additional information and/or documentation to confirm my tax status. I agree to comply at all times with such a request from Investec Bank plc within the time specified by Investec Bank plc in its request.
- 2) I agree to notify Investec Bank plc within 30 days of a change to the information that I have provided in this form. I agree to provide evidence of the change if I am asked to.
- 3) I declare that the information provided in this form is true and correct.
- 4) I agree that if I am identified as a Reportable Person for the purposes of any of UK's Information sharing agreements (including Foreign Account Tax Compliance Act (FATCA) and OECD Common Reporting Standard (CRS)), I authorise Investec Bank plc:
  - To share information about my accounts held with Investec Bank plc with HM Revenue and Customs who may then share the information with my local tax authority(ies) or
  - To share information about my accounts held with Investec Bank plc with my local tax authority(ies) if required under Applicable Laws

## Declaration signed by

Place and date

Signature

Print name

Capacity