

Self-Certification form for individuals

Client Name

Account Number(s) or Application Reference

Tax status

List all countries (including the US) where you are resident for tax purposes and provide your associated Tax Identification Number(s) (TIN) or equivalent (e.g. National Insurance number) below. Where no TIN or equivalent is available, you will need to provide a reason.

Country of tax residence	TIN or equivalent (UK clients – enter your National Insurance number)	If no TIN or equivalent – provide reason why?
1		
2		
3		

Declarations

If you need any further information, please visit www.investec.com/crs

- 1) I agree to provide any additional or supporting information related to my tax status within the time specified.
- 2) I will notify Investec Bank plc within 30 days of any change to my tax status.
- 3) I acknowledge that information about me and my accounts may be shared with HM Revenue and Customs and/or other relevant tax authorities to comply with all applicable laws and regulations (including, for example, Foreign Account Tax Compliance Act (FATCA) and the OECD Common Reporting Standards (CRS)).
- 4) By ticking the box, I declare the information I have provided in this form is true and correct.

We explained how we use your personal data when you completed your application. Our Data Protection Notice can be found at: www.investec.co.uk/dataprotection