



Foreign Tax Residency Form - Individual

Form purpose

In New Zealand, financial institutions are required to identify and report customers that are tax resident in foreign jurisdictions to the NZ Inland Revenue Department (NZ IRD). This information will be shared with the relevant competent Tax Authority of each country with which New Zealand has an agreement.

For tax advice or advice on how to complete this form, please contact a qualified tax professional.

Tick where applicable. Please use pen and write in English using BLOCK LETTERS.

Westpac use only

CRS No _____

System ID _____

A. Personal details

Name FIRST _____ MIDDLE _____ LAST _____

Mr Mrs Miss Ms Other (please specify) _____

Date of birth DD / MM / YYYY _____

Permanent residential address (A physical address is required. PO Box, 'Care of' or temporary address is not allowed).

Unit/Street Number _____

Street Name/Type _____

Suburb _____

State/Province _____

City _____

Postcode/Zip _____

Country _____

B. Declaration of foreign citizenship or residency for tax purposes

Are you a US citizen*? Yes No

Are you a tax resident in a country other than New Zealand? Yes No

If you answered **No** to both questions go to Section C.

If you answered **Yes** to either question, complete the information below then proceed to section D to finalise the form.

Countries of Tax Residency and TIN

Please list all countries other than New Zealand in which you are a tax resident and provide the Tax Information Number (TIN) for each country[^].

Country	TIN	Reason if no TIN
		<input type="radio"/> TIN not issued by this country.
		<input type="radio"/> Country has not issued a TIN to me (e.g. I am under age)
		<input type="radio"/> TIN not issued by this country.
		<input type="radio"/> Country has not issued a TIN to me (e.g. I am under age)
		<input type="radio"/> TIN not issued by this country.
		<input type="radio"/> Country has not issued a TIN to me (e.g. I am under age)
		<input type="radio"/> TIN not issued by this country.
		<input type="radio"/> Country has not issued a TIN to me (e.g. I am under age)

What if you do not have a TIN yet? If you have applied for a TIN but have not yet received it, then wait for your TIN to be issued before returning this form.

* You will be a US citizen if you were born in the US or have acquired US citizenship, unless you have formally renounced your US citizenship.

[^] If you are a US citizen or US tax resident, the TIN section must be completed with your social security number (SSN) issued by the US Social Security Administration or individual tax identification number (ITIN) issued by the US IRS.

C. Non US citizen or Non US resident for tax purposes

Were you born in the US? Yes - Provide supporting documentation below No - go to Section D to finalise the form

Tick which documents you are providing and attach a copy of this documentation to the back of the form

You'll need to provide ONE of the following:

- A copy of Certificate of Loss of Nationality of the United States
- A reasonable explanation** for not holding a Certificate of Loss of Nationality
- A reasonable explanation** for not obtaining US Citizenship at birth

AND provide ONE of the following:

- A copy of a Passport or Travel Document issued by a Non US Government, the United Nations or an agency of the United Nations
- A copy of a Citizenship Certificate issued by a Non US Government

** What is a 'reasonable explanation'? Provide a written explanation, that is dated and signed on a separate sheet of paper, then attach and return with this form. You should seek advice from a tax professional if you are unsure about whether or not you are a US citizen or US resident for tax purposes.

D. Declaration**I declare the following:**

- The information I have provided in this form is true and correct.
- If my circumstances change, causing the information provided on this form to become incorrect, I will provide the updated information promptly.
- Where this form is signed on behalf of the individual, I/We confirm that I/We have authority to sign this form on behalf of the individual.

Who do I contact about a change of circumstance?

Please use the contact information below. We may require you to complete this form again (depending on your circumstances).

Signature of Individual OR parent/guardian for individual*

Signature _____

Date DD / MM / YYYY _____

Print Full Name if acting as parent/guardian or otherwise has legal authority to act on behalf of the individual

FIRST _____

MIDDLE _____

LAST _____

Contact Number _____

*Parent/Guardian to sign if you are under 18 years of age

Next steps

- Step 1 **Ensure all relevant sections of the form are completed**
- Step 2 **Attach all supporting documentation (if required).** Please do not provide originals. Copies are sufficient.
- Step 3 **Return the completed form to:**

Please remember until the form has been completed and returned your account information may be reported to the NZ IRD.

Privacy statement

Westpac New Zealand Limited ("Westpac") adopts strict rules of confidentiality about its customers' affairs, and will observe all relevant privacy laws. The Westpac Privacy Policy describes the basis on which Westpac will collect, use or disclose personal information as well as your access rights to such personal information.

By signing this form you authorise any member of the Westpac Group to obtain, use and/or disclose information held about you to enable any member of the Westpac Group to comply with any laws, rules or regulations in New Zealand or any other country including any laws, rules or regulations reasonably expected to be implemented (including to enable the government of New Zealand to comply with any agreement between it and any other country).