



Foreign tax residence declaration – individual

Use this form to certify whether you **are** or **are not** a foreign tax resident for tax purposes.

Important: You may be treated as a foreign tax resident if you don't provide this information.

This form is required for individuals who **must** provide their foreign tax residency status.

Please print in CAPITAL LETTERS and place a cross ☒ in any applicable boxes.

1. Personal details

Please provide the plan/policy/member/account number for products you hold with AMP or any other reference number:

Surname

Full given name(s)

Date of birth

D	D	M	M	Y	Y	Y	Y
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Residential address (a PO Box is not acceptable)

Suburb

State

Postcode

Country

Contact phone number

Mobile number

Email address

1. Personal details continued

Address for communications

☐ Please cross ☒ if same as residential address.

Address


Suburb

State

Postcode

Country

2. Foreign tax residency

 The Australian Tax Office (ATO) website provides residency test calculators to help you determine your tax residency.

Are you a foreign tax resident?

- ☐ Yes—go to section 3.
- ☐ No—go to section 5 if both addresses (in section 1) are in Australia, otherwise go to section 4.

3. Your foreign tax residency details

Please provide details below to confirm that you're a foreign tax resident in the following country or countries:

	Country of foreign tax residency	Taxpayer Identification Number (TIN) ¹	No TIN ² (cross one only)
1			<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
2			<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
3			<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
4			<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C

1 A TIN (or equivalent) is an identifying number used for tax purposes which is normally issued by the local tax authority in a country (eg in Australia the ATO issues a Tax File Number (TFN)).

2 If you can't provide a TIN (or equivalent) please refer to the **No TIN reason** table and cross the relevant reason above (ie A, B or C).

Note: We'll contact you to obtain an explanation as to why you can't provide a TIN (or equivalent).

No TIN reason:

A	The country of my tax residence doesn't issue a TIN.
B	The country of my tax residence issues a TIN but I currently can't provide it.
C	The country of my tax residence doesn't require my TIN to be disclosed.

4. Evidence of tax residence

Complete this section if you've:

- declared a foreign address (in section 1) and have answered 'no' to section 2, or
- declared a foreign address (in section 1) and foreign tax residence (in section 3) that are not in the same country.

Important: You don't have to complete this section if you've:

- declared that you have an Australian address in section 1, and answered 'no' in section 2
- answered 'yes' in section 2 and provided details in section 3.

☐ I'm a temporary resident of Australia and use a mailing address in my home country.

☐ Other reason—please provide details below and **attach** a document that is evidence of your explanation:

Go to section 5.

5. Declaration

This form must be signed by you (the individual) **or** your financial adviser.

Client declaration

By completing and signing this declaration, I certify that the information I have provided is true and correct.

I agree to notify AMP as soon as possible when my tax residency changes.

Name (Print in CAPITAL LETTERS)

Signature

X

Date

DDMMYYYY

5. Declaration continued

Financial adviser declaration

By completing and signing this declaration, I certify that the individual named in this form has (verbally or in writing) confirmed (to me) the truth of the information provided and I have no reason to doubt its reasonableness.

AFS Licensee name (Print in CAPITAL LETTERS)

AFSL number

Representative/Employee name

Contact phone number

Mobile number

Signature

X

Date

DDMMYYYY

6. Checklist

- ☐ Have you completed all relevant sections of this form?
- ☐ If you've crossed **other reason** in section **4**, have you attached the required **documentary evidence**?
- ☐ Have you signed and dated the form where indicated?

Where to send this form

Email or mail this completed form to:

FTR@amp.com.au

Within Australia (no stamp required)

FTR Team

Reply Paid 300

PARRAMATTA NSW 2124

Any questions?

1300 663 253

From overseas

FTR Team

PO Box 300

PARRAMATTA NSW 2124

AUSTRALIA

Any questions?

61 2 8048 8257

Office use only

Internal reference number