



## Tax Residency Self-Certification for INDIVIDUALS

Information provided on this form will be used to comply with applicable tax regulatory requirements.

**Please use this form if you hold one or more personal accounts<sup>1</sup>.**

If you represent an entity please fill out and submit a Tax Residency Self-Certification for ENTITIES form.

(For internal use only) CIF Number

### A. Identification of Account Holder

Name of Individual			
Permanent residence addresses (street, apt. or suite no., or rural route). <b>Do not use P.O. box or in-care address</b>			
City or town	Province/State	Postal Code/Zip Code	Country (do not abbreviate)

### B. Account Holder Tax Residency


1) Are you a U.S. person for tax purposes<sup>2</sup>?  Yes  No  
 If you answered YES, please provide your U.S. TIN (Taxpayer Identification Number) \_\_\_\_\_.

2) Are you a resident of any countries other than the U.S. for tax purposes<sup>3</sup>?  Yes  No  
 If you answered YES, please:

- List those countries: \_\_\_\_\_; \_\_\_\_\_; \_\_\_\_\_
- Provide your TIN (Taxpayer Identification Number) for each country you have listed above: \_\_\_\_\_; \_\_\_\_\_; \_\_\_\_\_
- If you don't have a TIN for each country listed above, please provide your date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
(YYYY/MM/DD)

### C. Certification and Undertaking

- I hereby certify that the information provided on this form is correct and complete.
- I authorize Scotiabank to provide, directly or indirectly, to any relevant tax authorities or any party authorized to audit or conduct a similar control of Scotiabank for tax purposes, the information contained in this form and/or a copy of this form and to disclose to such tax authorities or such party any additional information that Scotiabank may have in its possession that is relevant to my qualification for any benefits claimed on the basis of this certification.
- I acknowledge that information contained in this form and information regarding my Scotiabank accounts (including information on account balances and payments received) may be reported to relevant tax authorities, and that those tax authorities may provide the information to any additional country I have listed above as being a country in which I am a resident for tax purposes.
- I undertake to advise Scotiabank immediately of any change in circumstances that causes the information contained herein to become incorrect and to provide Scotiabank with a suitable updated Tax Residency Self-Certification form within 30 days of such change in circumstances.

 Signature	Date (YYYY/MM/DD)
Print name of signatory	Capacity in which signatory is acting (if form is not signed by beneficial owner)

<sup>1</sup> Personal accounts are generally held by individuals, but may also be held by certain types of entity, including sole proprietorships and oral/informal trusts.  
<sup>2</sup> Attributes of a U.S. person for tax purposes include but are not limited to being a citizen of the U.S. or a lawful resident of the U.S. (including one who holds a U.S. Permanent Resident Card, also known as a "green card"). The "U.S." includes the five U.S. territories, i.e., the U.S. Virgin Islands, Puerto Rico, the Northern Mariana Islands, Guam, and American Samoa.  
<sup>3</sup> A country in which you are a resident for tax purposes is any country to which you are liable for income tax purposes