

## Tax File Number Declaration Form

Fields marked with an asterisk (\*) must be completed in order for us to action your request.

The information collected on this form is governed by the ClearView Information Handing policy which is available on **www.clearview.com.au**.

A. Investor and Joint Investor details		
My ClearView Managed Investments account, or		
My ClearView Savings Bond account		
*My account number / (	e.g. TSAV / 100000)	
*My account number / (	e.g. TINV / 100000)	
*Title (Investor)	*Gender *Date of birth	
Mr Mrs Ms Miss Dr Other	Male Female D D M M Y Y Y Y	
*Given name(s)	*Surname	
*Title (Joint Investor)	*Gender *Date of birth	
Mr Mrs Ms Miss Dr Other	Male Female D D M M Y Y Y Y	
*Given name(s)	*Surname	
*Account name (for Company, Trusts or Partnerships)		
D. Tau File Neurale and (TENIVA catualing Decimals Neurale and (ADNI) an accounting		
B. Tax File Numbers (TFN)/Australian Business Numbers (ABN) or exemption  Please refer to section titled 'Tax File Numbers (TFN)/Australian Business Numbers (ABN)' in the ClearView Managed		
Investments SPDS for information about quoting your TFN/ABN.	Business Numbers (ABN). In the clearview Managea	
Is the Investor a tax resident of Australia? Yes	No	
Tax File Number (Investor 1)	Tax File Number (Investor 2)	
Exemption Code (if applicable)	Exemption Code (if applicable)	
Company/Trust/Partnership/Trustee of a Superannuation fund		
Tax File Number	ABN	
If you are not a resident of Australia for tax purposes, please complete the section below:		
Tax Residency rules differ by country. For the US, tax residency can be as a result of citizenship or residency.		
Is the Investor a tax resident of another Country?		



If the Investor is a tax resident of a country other than Australia, please provide their tax identification number (TIN) or equivalent below. If they are a tax resident of more than one other country, please list all relevant countries below. A TIN is the number assigned by each country for the purposes of administering tax laws. This is the equivalent of a Tax File Number in Australia or a Social Security Number in the US. If a TIN is not provided, please list one of the three reasons specified (A, B or C) for not providing a TIN. TIN If no TIN, list reason A, B or C 1. Country 2. Country TIN If no TIN, list reason A, B or C TIN 3. Country If no TIN, list reason A, B or C If there are more countries, provide details on a separate sheet and tick this box Reason A: The country of tax residency does not issue TINs to tax residents

Reason B: The individual has not been issued with a TIN



## C. Declaration

By signing this request form, I/we make the following statements:

- · declare that all the details given in this form are true and correct; and
- declare that, if signing under a power of attorney, I/we verify that, at the time of signing, I/we have not received a notice of revocation of that power.

We are committed to handling your personal information and sensitive information in a secure manner and in accordance with the Privacy Act 1988 (Cth). For a copy of our Information Handling Policy, please visit **www.clearview.com.au**.

Full name (print clearly in block letters)	
Type of investor	
☐ Individual ☐ Joint investor 1 ☐ Director 1 ☐ Trustee 1 ☐ Power of Attorney	Sole director and sole company secretary
Signature of Investor	Date
X	DDMMYYYY
Full name (print clearly in block letters)	
Type of investor	
Joint investor 2 Director 2 Trustee 2	Power of Attorney
Signature of joint investor	Date
X	DDMMYYYY

## Sending your Form

Please send the form to us via email or mail.

Mailing address: Email address:

ClearView Wealth client.wealth@clearview.com.au Reply Paid 4232

Sydney NSW 2001

If you have any questions or need help please call our Service Centre on 132 977.