

**TAX STATUS DECLARATION FORM –
 INDIVIDUALS**
SAVE FORM
PRINT FORM
Tax Residency Information

All investors are now required to provide their country/ies of tax residency (including Australian tax residency) and promptly advise Avanteo Investments Limited (AIL) and Colonial First State Investments (CFSIL) if these details change. Tax residency information provided may be reported to the relevant tax authorities.

What do I need to complete?

You need to complete all sections of this document.

1 ACCOUNT DETAILS

Account number

2 INVESTOR DETAILS

Surname

Date of birth dd/mm/yyyy

Given name(s)

Residential Address (PO Box is NOT acceptable)

Unit number	<input type="text"/>	Street number	<input type="text"/>	Street name	<input type="text"/>		
Suburb	<input type="text"/>			State	<input type="text"/>	Postcode	<input type="text"/>
Country	<input type="text"/>						

3 TAX INFORMATION

Tax Residency rules differ by country. Whether an individual is tax resident of a particular country is often (but not always) based on the amount of time a person spends in a country, the location of a person's residence or place of work. For the US, tax residency can be as a result of citizenship or residency.

Please answer **both** tax residency questions:

 Are you a tax resident of Australia? Yes No

 Are you a tax resident of another country? Yes No

If you are a tax resident of a country other than Australia, please provide your tax identification number (TIN) or equivalent below. If you 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 codes specified A, B or C.

1. Country	<input type="text"/>	TIN	<input type="text"/>	Code	<input type="text"/>
2. Country	<input type="text"/>	TIN	<input type="text"/>	Code	<input type="text"/>
3. Country	<input type="text"/>	TIN	<input type="text"/>	Code	<input type="text"/>

If there are more countries, provide details on a separate sheet and tick this box

Code A The country of tax residency does not issue TINs to tax residents

Code B The individual has not been issued with a TIN

Code C The country of tax residency does not require the TIN to be disclosed

4 DECLARATION**IMPORTANT NOTE:**

→ Complete the Declaration section below (either you or your financial planner to sign)

I declare that:

- The answers to all questions, declarations and all information supplied by me is true and correct
- I will promptly advise AIL and CFSIL if these details change
- I certify that I am the named person above or authorised to provide information on their behalf
- I am aware that information provided about me and my accounts may be provided to the relevant tax authorities.

INVESTOR DECLARATION (The person named in this form)

Signature

Date

OR**FINANCIAL PLANNER DECLARATION**

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

AFS Licensee name

AFSL number

Representative/Employee name

Phone number

Signature

Date

Avanteos Investments Limited ABN 20 096 259 979, AFSL 245531 (AIL) is the trustee of the Colonial First State FirstChoice Superannuation Trust ABN 26 458 298 557 and issuer of FirstChoice range of super and pension products. Colonial First State Investments Limited ABN 98 002 348 352, AFSL 232468 (CFSIL) is the responsible entity and issuer of products made available under FirstChoice Investments and FirstChoice Wholesale Investments. This document may include general advice but does not take into account your individual objectives, financial situation, needs or tax circumstances. The Target Market Determinations (TMD) for our financial products can be found at www.cfs.com.au/tmd, which include a description of who a financial product might suit. You should read the relevant Product Disclosure Statement (PDS) and Financial Services Guide (FSG) carefully, assess whether the information is appropriate for you, and consider talking to a financial adviser before making an investment decision. You can get the PDS and FSG at www.cfs.com.au or by calling us on 13 13 36. Tax considerations are general and based on present tax laws and may be subject to change. You should seek independent, professional tax advice before making any decision based on this information. AIL and CFSIL are not registered tax (financial) advisers under the Tax Agent Services Act 2009 and you should seek tax advice from a registered tax agent or a registered tax (financial) adviser if you intend to rely on this information to satisfy the liabilities or obligations or claim entitlements that arise under a tax law.