

Individual Tax Residency Self Certification Form

What happens with my personal information?

The information in this form will be held by the Trustee and/or the Scheme's administration manager (Civic Financial Services Ltd), at their address set out in the Scheme's PDS and may be accessed by Inland Revenue in New Zealand to verify compliance with Common Reporting Standard requirements. If you are tax resident in a country outside New Zealand, we may be legally obliged to report the information in this form, along with information in relation to your account, to Inland Revenue, who may share the information with overseas tax authorities under international agreements.

Privacy Statement

The Privacy Act 1993 contains certain safeguards limiting the collection, use, storage, and disclosure of members' personal information. As a member of the Scheme, you have the right to request access and to request correction of any personal information held in respect of you.

Defined terms

The back of this form details descriptions of the key terms which should assist you in completing the form.

Any questions?

If you have any questions about this form, please contact us on 04 978 1250 between 9am to 5pm Monday to Friday, or at admin@supereasy.co.nz

Please return full form (including declaration on page 2) to:

admin@supereasy.co.nz

OR

SuperEasy
PO Box 5521
Wellington 6140

1. Personal Details

<input type="radio"/> Mr	<input type="radio"/> Mrs	<input type="radio"/> Miss	<input type="radio"/> Ms	Member number	<input type="text"/>	Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name		First name(s)				Surname					
Home address		Number & street			Suburb		Town/city		Postcode		
Postal address <small>(if different to above)</small>		Number & street			Suburb		Town/city		Postcode		
Phone		Home				Mobile					
Email address											

2. Tax Residency

- I am only a tax resident in New Zealand (please go to the declaration in **Section 3**)
- I am a tax resident of more than one country (please list each of these below)

Country/jurisdiction of tax residence	Taxpayer identification number (TIN)	Reason no TIN available (see below)
1. <input type="text"/>	<input type="text"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>	<input type="text"/>
3. <input type="text"/>	<input type="text"/>	<input type="text"/>

If a TIN is unavailable please provide the appropriate reason (A, B or C) as detailed below:

Reason A - The country/jurisdiction does not issue TINs to its residents

Reason B - The country does not require the collection of TINs under domestic law

Reason C - You are otherwise unable to obtain a TIN, or equivalent number (If you have selected this reason, please explain why you are unable to obtain a TIN in the below table)

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

3. Declaration

I acknowledge that the details in this form and information regarding the Account Holder and any Reportable Account(s) (as defined in the New Zealand CRS Applied Standard) may be provided to Inland Revenue and exchanged with tax authorities of any number of other countries/jurisdictions pursuant to intergovernmental agreements to exchange financial account information.

I certify that I am the account holder to which this form relates.

I confirm that all of the information provided in this certificate is true and correct. I will advise the Trustee immediately of any change in circumstances which affects the tax residency status of the individual identified in Section 1 of this form or causes the other information provided in the certificate to become incorrect or incomplete. I will provide the Trustee with a suitably updated self-certification and declaration within 90 days of such a change in circumstances.

Signature	Date	D D	M M	Y Y	Y Y
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Summary Descriptions of Select Defined Terms

These are selected summaries of defined terms provided to assist you with the completion of this form. Further details can be found through Inland Revenue guidance.

If you have any questions then please contact your tax adviser or Inland Revenue.

Account Holder

The term "Account Holder" means the person listed or identified as the holder of a Financial Account (for example members of the Scheme). A person, other than a financial institution, holding a Financial Account for the benefit of another person as an agent, a custodian, a nominee, a signatory, an investment advisor, an intermediary, or as a legal guardian, is not treated as the Account Holder. In these circumstances that other person is the Account Holder. For example in the case of a parent/child relationship where the parent is acting as a legal guardian, the child is regarded as the Account Holder. With respect to a jointly held account, each joint holder is treated as an Account Holder.

Financial Account

A Financial Account is an account maintained by a financial institution and includes: Depository Accounts; Custodial Accounts; Equity and debt interest in certain Investment Entities; Cash Value Insurance Contracts; and Annuity Contracts.

TIN (including "functional equivalent")

The term "TIN" means Taxpayer Identification Number or a functional equivalent in the absence of a TIN. A TIN is a unique combination of letters or numbers assigned by a jurisdiction to an individual or an Entity and used to identify the individual or Entity for the purposes of administering the tax laws of such jurisdiction. Further details of acceptable TINs can be found at the OECD automatic exchange of information portal.

Some jurisdictions do not issue a TIN. However, these jurisdictions often utilise some other high integrity number with an equivalent level of identification (a "functional equivalent"). Examples of that type of number include, for individuals, a social security/insurance number, citizen/personal identification/service code/number, and resident registration number.

Office use only

Accepted <small>(For and on behalf of the Trustee)</small>

Date accepted

D D	M M	Y Y	Y Y
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