



Use a black or blue pen. Print in CAPITAL letters inside the grey areas as shown in this example.

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X

8th Floor, 100 University Avenue
Toronto, Ontario M5J 2Y1
Telephone 1-800-564-6253
www.computershare.com

Name of Company

Holder Account Number

C

Registered Name in which account is held (eg. John Smith)

Apt.

Street Number

Street Name

City

Prov. / State

Postal / Zip Code

Common Reporting Standards (CRS) Self Certification Form - Individuals

Computershare is required under Part XIX of the *Income Tax Act* to collect the information you provide on this form to determine if we have to report your financial account to the Canada Revenue Agency (CRA). The CRA may share this information with the government of a foreign jurisdiction that you are a resident of for tax purposes or deemed to be resident of for reporting purposes. You can ask us if we reported your financial account to the CRA and what information we gave.

Please complete All Sections of this form. Each account holder of a joint (or multiple name registration account) has to fill out a declaration of tax residence form.

If you do not have all the necessary information when you fill out the form, you may give us the missing information within **90 days**. If you do not give the missing information to us within 90 days, we may have to report your financial account to the CRA.

For questions on how to define your tax residency status, please speak to a professional tax adviser. For more information on how to fill out this form, see **Section 4** at the end of the form.

Section 1 – Identification of account holder

Date of Birth	Year	Month	Day
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Permanent residence address			
Apartment number – street number and name			City
Province, territory, state, or sub-entity		Country or jurisdiction	Postal or ZIP code
Mailing address (only if different from permanent residence address)			
Apartment number – street number and name			City
Province, territory, state, or sub-entity		Country or jurisdiction	Postal or ZIP code

Section 2 - Declaration of Tax Residence

Tick (✓) all of the options below that apply to you.

If you need help with your tax residency information for this form, see Income Tax Folio, S5-F1-C1, *Determining an Individual's Residence Status*, which you can find on the CRA website, www.cra.gc.ca.

I am a tax resident of Canada.

If you ticked this box, give your Social Insurance Number:

I am a tax resident of a jurisdiction other than Canada.

If you ticked this box, give your jurisdiction(s) of tax residence and taxpayer identification number(s) (TIN) on the reverse of this form.



If you do not have a TIN for a specific jurisdiction, give the reason using one of these choices:

- Reason 1** I will apply or have applied for a TIN but have not yet received it.
- Reason 2** My jurisdiction of tax residence does not issue TINs to its residents.
- Reason 3** Other reason. (Please explain in the below boxes why you do not have a TIN.)

Jurisdiction of Tax Residence		Taxpayer Identification Number ("TIN")	If you do not have a TIN, choose reason 1, 2, or 3
1			
2			
3			

If you have selected Reason 3, please explain in the following boxes why you do not have a TIN.

1	
2	
3	

Section 3 - Certification

I certify that the information given on this form is correct and complete. I will give Computershare a new form within 30 days of any change in circumstances that causes the information on this form to become inaccurate or incomplete.

Name (print)	Signature	Date (yyyy/mm/dd)
/ /		/ /

Please return the completed form to:

Computershare
100 University Avenue, 8th Floor
Toronto, Ontario M5J 2Y1

Section 4 - How to fill out the form

Section 1 – Identification of account holder

Use Section 1 to identify the account holder. Sometimes the account holder's address may be different from the mailing address. If this is the case, give both addresses.

The **account holder** is the person listed or identified as the holder of the financial account by the financial institution that maintains the account. But, when a person other than a financial institution holds a financial account for the benefit of or for another person as an agent, custodian, nominee, signatory, investment advisor, or intermediary, they are not considered the account holder. In such cases, the account holder is the person for whom the account is held.

If a trust or an estate is listed as the holder of a financial account, the trust or the estate is the account holder, not the trustee or the liquidator. Similarly, if a partnership is listed as the holder of a financial account, the partnership is the account holder, not the partners in the partnership. In such cases, fill out all Sections in the Tax Residency Self-Certification for Entities.

Section 2 – Declaration of tax residence

Use Section 2 to identify the account holder's tax residence and taxpayer identification number. If the account holder does not have such a number, give the reason.

Generally, an individual will be a **tax resident** of a jurisdiction if, under the laws of that jurisdiction, they pay or should be paying tax there because of their domicile, residence, or a similar criterion.

Individuals who are tax residents in more than one jurisdiction can rely on the tiebreaker rules in tax conventions (when they apply) to resolve cases of dual tax residence.

For more information on tax residency, talk to your tax adviser or go to oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/#d.en.347760.

A **taxpayer identification number**, often referred to by its abbreviation TIN, is a unique identifier made of letters or numbers that the jurisdiction assigns to an individual. The jurisdiction uses the TIN in administering its tax laws to identify the individual. Enter the TIN in its official format. For more details about acceptable TINs, go to oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-identification-numbers/#d.en.347759.

Reasons that fall under "Reason 3: **Other reason**" for not having a TIN include not being eligible to receive one. However, if you are eligible to receive a TIN but you do not have one, you have 90 days to apply for one and 15 days after you receive it to give it to Computershare.

Section 3 – Certification

Make sure you fill in and sign Section 3 before you return this form to Computershare.

Privacy Notice: Computershare is committed to protecting your personal information. In the course of providing services to you and our corporate clients, we receive non-public personal information about you from transactions we perform for you, forms you send us, other communications we have with you or your representatives, etc. This information could include your name, address, Social Insurance Number (SIN) or Taxpayer Identification Number (TIN), securities holdings and other financial information. We use this to administer your account, to better serve you and our clients' needs and for other lawful purposes relating to our services. Computershare may transfer personal information to other companies in or outside of Canada that provide data processing and storage or other support in order to facilitate the services it provides. We have prepared a Privacy Code to tell you more about our information practices, how your privacy is protected and how to contact our Chief Privacy Officer. It is available at our website, www.computershare.com, or by writing to us at 100 University Avenue, Toronto, Ontario, M5J 2Y1.

We will use your SIN/TIN for income reporting. We may also ask for your SIN/TIN as an identification-security measure if you call or write to request service on your account; however you may decline this usage. Computershare will use the information you are providing in order to process your request and will treat your submission of this form as your consent to us so doing.