

SOCIETY USE ONLY	Account Number	Customer Number

Tax Residency: Self-Certification Form

Please read the following information before completing this form

The UK government has signed, and will be signing, a number of inter-governmental agreements to share tax information, where applicable, with the tax authorities in other countries. The requirement to collect certain information about each customer's tax arrangements is part of UK legislation and as a financial institution we are legally obliged to collect it. We are asking for your tax residency and tax identification numbers (where applicable) and will record this on our records now, but will only disclose this information to the relevant tax authorities if and when we are required to do so under UK law.

The current list of countries that have signed information sharing agreements can be found online by searching for 'OECD Automatic Exchange Portal'.

Your tax residence generally is the country in which you live for more than half the year, but rules differ. Further information is available from the OECD Automatic Exchange Portal (within the section called 'CRS Implementation and Assistance').

Scottish Building Society is not allowed to give tax advice. If you have any questions on how to complete this form we recommend that you speak to your tax authority (for example, HMRC in the UK) or your tax or legal adviser.

This form ONLY needs to be completed if you are unable to answer YES to the following question:

1. Are you a citizen and tax resident of the UK only? YES NO

Accountholder Information

Title	<input style="width: 100%;" type="text"/>		
Forename(s)	<input style="width: 100%;" type="text"/>		
Surname	<input style="width: 30%;" type="text"/>	Date of Birth	<input style="width: 30%;" type="text"/>
Current Residential Address	Address for Correspondence (if different)		
	<input style="width: 100%;" type="text"/>		<input style="width: 100%;" type="text"/>
Postcode	<input style="width: 30%;" type="text"/>		<input style="width: 30%;" type="text"/>
Country	<input style="width: 30%;" type="text"/>		<input style="width: 30%;" type="text"/>

Country of Tax Residence

If you have answered No to question 1 above, please answer the following questions:

2. Are you a citizen of and/or tax resident in the United States of America? YES NO
3. If you answered YES to question 2, please provide your US Tax Identification Number (TIN)

Country of Tax Residency	Tax Reference Number (TIN)	If you are unable to provide your TIN, please say why
United States		

4. Are you tax resident in a country other than the UK or the USA? YES NO

5. If you answered YES to question 4, please list the countries other than the UK or USA of which you are tax resident, if any, together with the associated tax identification number:

Country of Tax Residency	Tax Reference Number (TIN)	If you are unable to provide your TIN, please say why

Declaration

I understand that the information I have supplied is covered by the full provisions of the terms and conditions governing my relationship with Scottish Building Society, which also sets out how the Society may use and share the information I have supplied.

I acknowledge that the information contained in this form and information regarding reportable account(s) held by me may be provided to the UK tax authorities and exchanged with tax authorities of another country or countries in which I may be tax resident, in accordance with intergovernmental agreements to exchange financial account information.

I certify that I am the accountholder (or am authorised to sign for the accountholder) of all the account(s) to which this form relates.

I declare that all statements made on this self-certification form are complete and correct, to the best of my knowledge and belief.

I undertake to advise Scottish Building Society within 30 days of any change in circumstances which affects my tax residency status as identified on this form or causes the information contained herein to become incorrect, and to provide Scottish Building Society with a suitably updated self-certification form within 30 days of any such change in circumstances.

SIGNATURE:

DATE:

If you are not the accountholder, please print your name below and indicate the capacity in which you are signing the form. If signing under a power of attorney or other document appointing you to act on behalf of the accountholder, please provide the Society with a certified copy of the relevant document (if you have not already done so).

NAME:

CAPACITY: