

TAX RESIDENCY AND FOREIGN TAX INFORMATION

Under New Zealand Law, Covisory must collect a self-certification from you about your tax residency status. Covisory must provide your information (even if you refuse to give information or a declaration) to Inland Revenue, who may share that information with overseas tax authorities under international agreements.

You must complete this self-certification form and return it to Covisory if you are an individual.

If you are unsure how to complete this form or do not understand the consequences of not providing the correct information, please seek advice from a tax professional, lawyer, or other adviser before you complete this form. For more information about why you need to complete this form, see www.ird.govt.nz/infoshare.

SECTION 1. ACCOUNT HOLDER DETAILS

Full Name		Residential address (do not provide a PO Box or in-care of address)	
First Name(s)	Click or tap here to enter text.	Address	Click or tap here to enter text.
Surname	Click or tap here to enter text.		Click or tap here to enter text.
Date of Birth	Click or tap to enter a date.	City/Town	Click or tap here to enter text.
Country of Birth	Click or tap here to enter text.	Province/state	Click or tap here to enter text.
		Postal Code/zip code	Click or tap here to enter text.
		Country	Click or tap here to enter text.

SECTION 2. ACCOUNT HOLDER TAX RESIDENCE(S)

I confirm:

I am only a tax resident of New Zealand (go to section 3). OR

I am a tax resident of one or more countries other than New Zealand and I have listed all these below.

(Please note, United States of America Citizens are considered to be tax residents of the United States of America).

	Country of Tax Residence 1	Country of Tax Residence 2	Country of Tax Residence 3
List all countries of tax residence (other than New Zealand)	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
List Tax Identification Number (TIN) (or country equivalent)	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
OR Reason if TIN is not provided	<input type="checkbox"/> A Country doesn't issue TIN	<input type="checkbox"/> A Country doesn't issue TIN	<input type="checkbox"/> A Country doesn't issue TIN
	<input type="checkbox"/> B Country doesn't require TIN collection	<input type="checkbox"/> B Country doesn't require TIN collection	<input type="checkbox"/> B Country doesn't require TIN collection
	<input type="checkbox"/> C Applied for TIN, will provide soon	<input type="checkbox"/> C Applied for TIN, will provide soon	<input type="checkbox"/> C Applied for TIN, will provide soon
	<input type="checkbox"/> Z Cannot obtain TIN (explain below)	<input type="checkbox"/> Z Cannot obtain TIN (explain below)	<input type="checkbox"/> Z Cannot obtain TIN (explain below)
AND if reason Z, explanation for not being able to obtain TIN	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

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SECTION 3. DECLARATION

I have the authority to provide the information in this self-certification form, which is true and complete. I understand that not giving information or giving false information could be serious under New Zealand Law. I understand Covisory may need extra information from me about my tax residency status, and I will provide any extra information Covisory requests. I will also contact Covisory if any information I have given changes.

Signature

Name (Please print first and last name)

Click or tap here to enter text.

Date Click or tap to enter a date.

We take your privacy seriously and understand the need to keep your information confidential and secure. You can access or correct information we have about you – we may charge you a fee for access. We can also collect, use, and disclose information about you. We do this, among other things to manage accounts. Products or Services we offer or to comply with laws. Talk to us if you need more information about our full rights to collect, use, and disclose information about you.