# Existing Individual Client – Self-Certification Form

## **Application form**



- Please use black ink and write clearly inside the boxes provided using capital letters
- Mark your answers with a cross in the appropriate box like this:
- If you make a mistake, please correct it but don't use correction fluid
- You must complete all sections of this form, except those marked 'if applicable'. Not doing so could delay your application.

### What's next?

Please send your completed application form to: Fidelity PO Box 391 Tadworth KT20 9FU

Tax regulations require us to collect information about each investor's tax residency. In certain circumstances (including if we do not receive a valid self-certification from you) we may be obliged to share information on your account with tax authorities.

If you have any questions about your tax residency, please contact your tax adviser. Should any information provided change in the future, please ensure you advise us of the changes promptly. If you require guidance please refer to the definitions here: **www.fidelity.co.uk/formsandguides**.

The term 'tax regulations' refers to regulations created to enable automatic exchange of information and include FATCA, various Agreements to Improve International Tax Compliance entered into between the UK and its Crown Dependencies and its Overseas Territories and the OECD Common Reporting Standard for Automatic Exchange of Financial Account Information.

**Reference number** (For us to be able to process this form correctly, please provide the reference number specified on the top of the letter enclosed with this form)

1 About you
Account Number or Customer Reference Number (if applicable)
Title       Mr     Mrs     Ms     Other:
Surname
First and other names in full
Gender       Male     Female
<b>Your residential address</b> – 'Care of' and PO Box addresses are not allowed for regulatory reasons. By entering your address you are confirming that you are a UK resident. Only UK addresses are eligible unless you are a Crown Employee or British Forces Posted Overseas (BFPO) or the spouse/civil partner of a Crown Employee or British Forces Posted Overseas (BFPO). House number/name
Street, city, county and country
Postcode

## C 0 0 1 0 3 0 1

## About you (continued)

1

Telephone number Alternate telep			
Email address			
2 Tax details			
Are you a resident in the UK for tax purposes? If yes please	mark this box		
Are you also a resident in any other country(s) for tax purp	oses? If so please complete the following fields		
First country	First country tax identifier		
I do not hold a tax identifier for this residency	ise mark an X in this box		
Additional country	Additional country tax identifier		
I do not hold a tax identifier for this residency If correct please mark an X in this box			
I do not hold a tax identifier for this residency	ise mark an X in this box		
I do not hold a tax identifier for this residency If correct plea Additional country	se mark an X in this box Additional country tax identifier		
Additional country			
Additional country	Additional country tax identifier		
Additional country	Additional country tax identifier		
Additional country	Additional country tax identifier		
Additional country  Additional country  I do not hold a tax identifier for this residency  I do not have a tax identification number for the tax reside  The relevant jurisdiction does not issue TINs	Additional country tax identifier		
Additional country  Additional country  I do not hold a tax identifier for this residency  I do not have a tax identification number for the tax reside  The relevant jurisdiction does not issue TINs  The account holder has not been issued with a TIN	Additional country tax identifier		

## 3 Birth details

Date of birth (DDMMYYYY)
Town of Birth
Country of Birth
Passport Territory

C 0 0 1 0 3 0 2

## 4 Declaration and signature

I declare that:

- The information given by me is correct to the best of myknowledge, and I will inform Fidelity immediately of any changes to the information contained therein.
- We agree to notify Fidelity immediately in the event the information on the self-certification changes.

#### Your signature

#### Signature

Print name		

### Company stamp

### Unique Adviser Number

#### **Date signed**

	(DDMMYYYY)
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