

# Individual Tax Residence Self-Certification Form

Please read these instructions before completing both sides of the form.

Please write clearly in BLOCK CAPITALS with a BLACK ballpoint pen in the white spaces or mark (X) in the boxes.

UK tax regulations require us to collect information about each investor's tax residence status. If you have any questions about your tax residence, please contact your tax adviser.

If your tax residence (or that of the account holder, if you are completing the form on his or her behalf) is located outside the United Kingdom, we may be obliged to pass on the information in this form and other financial information with respect to your financial accounts to HM Revenue & Customs. We may also be required to do this if we do not receive a valid, completed Self-Certification form from you.

We shall treat the information on this form as valid and correct unless we are informed of a change in circumstance relating to the account holder's tax status or other fields included on this form.

Please fill in this form if you are an individual account holder, sole trader or sole proprietor.

For joint or multiple account holders, please complete a separate form for each individual person.

If you are filling in this form on behalf of someone else then please tell us in what capacity you are signing in Part 3.

## 1 Identification of individual account holder

### Name of account holder:

Title    Mr    Mrs    Miss    Ms    Other title  
                   

Surname

Forename(s)

Middle name(s):

### Address:

Residential address

Country of address

Postcode   

Date of birth   

Please complete parts 2 and 3 overleaf



Please go to [schroderspw.co.uk](https://schroderspw.co.uk)  
or call us on **0344 822 8910**

Please contact us if you'd like this  
information in an alternative format  
such as Braille or large print.

Calls may be monitored or recorded in case we need to check we have carried out your instructions correctly and to help improve our quality of service. Not all telephone services are available 24 hours a day, 7 days a week. Please speak to an Adviser for more information. Call costs may vary depending on your service provider.

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Registered Office for both companies: 25 Gresham Street, London EC2V 7HN. Eligible investments with us are protected by the Financial Services Compensation Scheme. We are covered by the Financial Ombudsman Service.