

Customers - Please visit any Greater Bank branch or contact Customer Service for further assistance

**This form is only to be completed by individuals or sole traders.  
Joint account holders must each complete a separate form.**

### 1. Identification

First Name

Middle Name(s)

Surname

Address

Date of Birth

Are you an existing Greater Bank customer?  
 Yes ▼       No

Please provide at least one (1) account number

### 2. Tax Residency

Are you a tax resident in a country other than Australia?  
 Yes ▼       No (proceed to Part 3 Declaration)

Country or Jurisdiction of Tax Residence

Tax Identification Number (TIN) or Equivalent

If applicable, reason for not providing a TIN or Equivalent  
(enter Reason A, B or C)

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If applicable, reason for not providing a TIN or Equivalent  
(enter Reason A, B or C)

If TIN or equivalent is not provided, please provide a reason from the following options:

**Please note, if you are a US resident for tax purposes, reasons A and C do not apply.**

**Reason A:** The country/jurisdiction where the person is resident does not issue TINs to its residents

**Reason B:** The person is otherwise unable to obtain a TIN or equivalent number

**Reason C:** No TIN is required. (Note. Only select this reason if the domestic law of the relevant jurisdiction does not require the collection of the TIN issued by such jurisdiction)

If Reason B is selected, please explain why you are unable to obtain a TIN:

### 3. Declaration

I confirm that I am the individual identified in Part 1 of this form, or I am authorised to complete this form on behalf of the individual identified in Part 1.

I acknowledge that the information contained in this form and additional information about the Account Holder and any Reportable Account(s) may be provided to the Australian Taxation Office (ATO) and exchanged with foreign tax authorities in the countries or jurisdictions where I am or may be a tax resident, pursuant to intergovernmental agreements to exchange financial account information.

I acknowledge that Greater Bank's handling of the personal information provided in this form is covered by Greater Bank's General Banking Terms and Conditions and its Privacy and Credit Reporting Policy, as available on its website ([www.greater.com.au](http://www.greater.com.au)).

I declare that the information I have provided in this form is true and correct and I undertake to advise Greater Bank within 60 days of any change in circumstance that affects the tax residency status of the individual identified in Part 1 of this form or otherwise causes the information provided in this form to become incorrect or obsolete. In such an instance, I undertake to provide Greater Bank with an updated Foreign Tax Residency Self-Certification form within 60 days.

Name

Signature

I am signing this form in the capacity of:

Account Holder       Other ▼

Specify:

Date (DD/MM/YYYY)

**Please note:** If you are signing this form under an authority, you will also need to provide supporting documentation to evidence this.