

According to Parts XVIII and XIX of the *Income Tax Act*, Canadian financial institutions must collect the information required in this form to determine if they must provide information about your financial account to the Canada Revenue Agency (CRA). The CRA can provide this information to the government of a foreign jurisdiction in which you are a resident for tax purposes, or to the U.S. government if you are a citizen of that country. If such is the case, you can ask your financial institution about the nature of the information provided. **In the case of a joint account, each holder must fill out a separate CRS-FATCA self-certification form.**

Allocated or existing account No. _____

1. INFORMATION ABOUT THE REQUESTER

Ms. _____
 Mr. Last name _____ First name _____ Date of birth (YYYY MM DD) _____

2. ADDITIONAL INFORMATION FOR THE SELF-CERTIFICATION

Select all options that apply and complete the information requested.

2.1 I am a resident of Canada for tax purposes.

2.2 I am a citizen or resident of the United States for tax purposes.

Please enter your: SSN _____ ITIN _____

If you do not enter a U.S. SSN/ITIN, please provide the reason (A or C) by referring to the list below: _____

2.3 I am a resident of a country other than Canada and the U.S. for tax purposes.

If you ticked this box, indicate all your countries of residence for tax purposes and taxpayer identification numbers (TINs).

#	Country of residence for tax purposes	TIN	If you don't enter a TIN, please provide the reason (A, B or C)
1			
2			
3			

If you ticked box 2.2 or 2.3 and you have a Canadian social insurance number, enter it: _____

List of reasons why a specific country's SSN/ITIN/TIN is not indicated:

Reason A: *I will request it or I have already requested it, but I have not yet received it. If I have not yet requested one, I have 90 days to apply for it and 15 days after I receive it to provide it to my financial institution.*

Reason B: *I am a resident for tax purposes of a country that does not issue a TIN to its residents (excluding the United States).*

Reason C: *I have it, but not on hand. I will provide it within 15 days of the date of this application.*

3. DECLARATION AND SIGNATURE

I certify that the information provided in my CRS-FATCA self-certification regarding my citizenship or country of residence for tax purposes is accurate and complete. I hereby permit you to share this information with your subsidiaries or affiliated companies for the purposes of risk management, updates to my profile as well as legal and regulatory compliance. Moreover, I agree to inform you of any change in circumstances that would result in that information becoming incomplete or inaccurate no later than 30 days after such a change.

Important notice: If the reason why the SSN/ITIN/TIN is not provided is A or C in accordance with Part XVIII and/or XIX of the *Income Tax Act*, I understand that my financial institution may have to report my account based on any indicator of a foreign country of residence for tax purposes and that I could be subject to a penalty of \$500 imposed by the CRA for not having provided my foreign TIN, or \$100 for not having provided my U.S. TIN. I agree to assume any liability directly or indirectly related to this situation.

_____ **X** _____
 Date (YYYY MM DD) Signature of holder

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