

Guide to completing your W-8BEN form



How to complete this form

Please review the guidance below before completing and signing your W-8BEN form and sending it back to us. We do not provide tax advice and it is your responsibility to complete the W-8BEN based on your circumstances. Further guidance and instructions are available at www.irs.gov under 'Forms & Instructions' or speak to your tax adviser.

Form **W-8BEN**
(Rev. October 2021)
Department of the Treasury
Internal Revenue Service

Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)
► For use by individuals. Entities must use Form W-8BEN-E.
► Go to www.irs.gov/FormW8BEN for instructions and the latest information.
► Give this form to the withholding agent or payer. Do not send to the IRS.

OMB No. 1545-1621

Do NOT use this form if:

- You are NOT an individual
- You are a U.S. citizen or other U.S. person, including a resident alien individual
- You are a beneficial owner claiming that income is effectively connected with the conduct of trade or business within the United States (other than personal services)
- You are a beneficial owner who is receiving compensation for personal services performed in the United States
- You are a person acting as an intermediary

Instead, use Form:

- W-8BEN-E
- W-9
- W-8ECI
- 8233 or W-4
- W-8IMY

Note: If you are resident in a FATCA partner jurisdiction (that is, a Model 1 IGA jurisdiction with reciprocity), certain tax account information may be provided to your jurisdiction of residence.

Part I Identification of Beneficial Owner (see instructions)

1

1 Name of individual who is the beneficial owner

2

2 Country of citizenship

3

3 Permanent residence address (street, apt. or suite no., or rural route). Do not use a P.O. box or in-care-of address.

City or town, state or province. Include postal code where appropriate.

Country

4

4 Mailing address (if different from above)

City or town, state or province. Include postal code where appropriate.

Country

9

U.S. taxpayer identification number (SSN or TIN), if required (see instructions)

6a

Foreign tax identifying number (see instructions)

5

7 Reference number(s) (see instructions)

8

8 Date of birth (MM-DD-YYYY) (see instructions)

Part II Claim of Tax Treaty Benefits (for chapter 3 purposes only) (see instructions)

7

9 I certify that the beneficial owner is a resident of within the meaning of the income tax treaty between the United States and that country.

8

10 Special rates and conditions (if applicable—see instructions): The beneficial owner is claiming the provisions of Article and paragraph of the treaty identified on line 9 above to claim a % rate of withholding on (specify type of income):

SECTION 10 GENERALLY NOT REQUIRED

Explain the additional conditions in the Article and paragraph the beneficial owner meets to be eligible for the rate of withholding:

Part III Certification

Under penalties of perjury, I declare that I have examined the information on this form and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:

- I am the individual that is the beneficial owner (or am authorized to sign for the individual that is the beneficial owner) of all the income or proceeds to which this form relates or am using this form to document myself for chapter 4 purposes;
- The person named on line 1 of this form is not a U.S. person;
- This form relates to:
 - (a) income not effectively connected with the conduct of a trade or business in the United States;
 - (b) income effectively connected with the conduct of a trade or business in the United States but is not subject to tax under an applicable income tax treaty;
 - (c) the partner's share of a partnership's effectively connected taxable income; or
 - (d) the partner's amount realized from the transfer of a partnership interest subject to withholding under section 1446(f);
- The person named on line 1 of this form is a resident of the treaty country listed on line 9 of the form (if any) within the meaning of the income tax treaty between the United States and that country; and
- For broker transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions.

Furthermore, I authorize this form to be provided to any withholding agent that has control, receipt, or custody of the income of which I am the beneficial owner or any withholding agent that can disburse or make payments of the income of which I am the beneficial owner. I agree that I will submit a new form within 30 days if any certification made on this form becomes incorrect.

9

Sign Here

☐ I certify that I have the capacity to sign for the person identified on line 1 of this form.

Signature of beneficial owner (or individual authorized to sign for beneficial owner)

Date (MM-DD-YYYY)

Print name of signer

For Paperwork Reduction Act Notice, see separate instructions.

Cat. No. 25047Z

Form **W-8BEN** (Rev. 10-2021)

Part I

1

Step 1
Enter your **FULL** name (not initials)

2

Step 2
Enter your country of citizenship in **FULL**, e.g. United Kingdom

3

Step 3
Enter your residential address including country. Do not enter PO Box, 'care of' or company addresses

4

Step 4
Only enter your mailing address if different from residential address

5

Step 5
Leave Section 7 blank

6

Step 6
Enter date of birth in US format (MM-DD-YYYY)

Part II

7

Section 9 Enter your country of residence in **FULL** if it has a tax treaty with the U.S. and you qualify as a resident of that country under the terms of that treaty (the UK has a treaty with the US, to check other countries refer to www.irs.gov/individuals/international-taxpayers/tax-treaties)

8

Section 10 This section is generally not applicable to treaty benefits in respect of dividends or interest (you should check the specific tax treaty for the country you are resident, refer to www.irs.gov/individuals/international-taxpayers/tax-treaties)

Part III

9

Sign and date the form – the form must be dated in US format (MM-DD-YYYY)

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