

Under Part XVIII and XIX of the *Income Tax Act*, Canadian financial institutions are required to collect the information you provide on this form to determine if they have to report your financial account to the Canadian Revenue Agency (CRA). CRA may share that information with the government of a foreign jurisdiction that you are resident for tax purposes, or to the U.S. government in you are a citizen of his country. You may ask your financial institution the nature of the information it has provided. **In the case of a joint account, each holder must complete a separate Schedule to CRS-FATCA Self-Certification.**

\_\_\_\_\_  
New or existing account No.

**1. INFORMATION ON APPLICANT**

- Ms. \_\_\_\_\_  
 Mrs. Surname \_\_\_\_\_ First name \_\_\_\_\_ Date of Birth (MM DD YYYY) \_\_\_\_\_  
 Mr. \_\_\_\_\_

**2. ADDITIONAL SELF-CERTIFICATION INFORMATION**

Select all options that apply and complete the requested information.

- I am a resident of Canada for tax purposes.  
If you ticked this box, give your Social Insurance Number: \_\_\_\_\_
- I am a citizen or resident of the United States for tax purposes.  
Please provide your: SSN \_\_\_\_\_ ITIN \_\_\_\_\_  
If you don't provide a SSN/ITIN of the United States, please provide the reason (A, C or D) in reference to the list below: \_\_\_\_\_
- I am a resident of a country other than Canada and the United States for tax purposes.  
If you checked this box, specify all your countries of residence for tax purposes and your taxpayer identification number (TIN).

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

**List of reasons why the SSN/ITIN/TIN of a country selected is not provided:**

- Reason A:** *I will 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 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 a 15-day period from the date hereof.*
- Reason D:** *I refuse to provide it, as required as per Part XVIII and/or XIX of the Income Tax Act.*

**3. REFUSAL TO PROVIDE SELF-CERTIFICATION INFORMATION (CHECK IF APPLICABLE)**

- I refuse to provide the information required about my citizenship and residency for tax purposes as per part XVIII and/or XIX of the *Income Tax Act*

**4. ATTESTATION**

- I certify that the information provided in this schedule to CRS-FATCA self-certification about my citizenship and residency for tax purposes is correct and complete. I authorize you to share this information with your subsidiaries and parent companies for risk management, profil update and legal and regulatory compliance purposes. I also agree to inform you of any changes in circumstances that causes the information provided to become incomplete or inaccurate within 30 days of such change.

**5. SIGNATURE**

**Important Notice:** if the reason for not providing a SSN/ITIN/TIN is A, C or D, or if I refuse to provide the information required as per Part XVIII and/or XIX of the *Income Tax Act*, I understand that my financial institution may have to declare my account based on any indicia that may indicate a foreign tax residence and that I may be subject to penalties from CRA as a result of my refusal or negligence to provide these information. I agree to assume any liability directly or indirectly related to this situation.

\_\_\_\_\_  
Date (MM DD YYYY)

**X**  
\_\_\_\_\_  
Signature of Applicant