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Human Financial Managed Investments

TFN and tax residency declaration form

Issued by Human Financial Management Limited (ABN 99 067 544 549, AFSL 227677) as responsible entity for the Human Financial Managed Investments.

1 DECEMBER 2024

Purpose of this form

Use this form to declare your tax residency for your Managed Investments account.

If you need any assistance in completing this form, please call us on **1300 048 135**.

Section 1: Investor and Joint investor details

Account number or SRN

e.g. TINV / 123456, I00000123456

Account number or SRN

e.g. TINV / 123456, I00000123456

Title (Investor)

Mr Mrs Ms Dr Other

Gender

Male Female Other

Date of birth

DD MM YYYY

Given name(s)

Surname

Title (Joint investor)

Mr Mrs Ms Dr Other

Gender

Male Female Other

Date of birth

DD MM YYYY

Given name(s)

Surname

Section 2: Tax File Number/Australian Business Number/exemption

Please refer to section titled 'Tax File Numbers (TFN)/Australian Business Numbers (ABN)' in the Human Financial Managed Investments PDS for information about quoting your TFN/ABN.

It is not a legal requirement to provide your Tax File Number (TFN), however if you don't, we are required by law to withhold tax from your investment income at the highest individual income tax rate plus Medicare levy.

Is the Investor a tax resident of Australia?

Yes No (Please complete **Section 3: Tax Residency**)

Tax File Number (Investor 1)

- -

Tax File Number (Investor 2)

- -

Exemption Code (if applicable)

Exemption Code (if applicable)

Company/Trust/Partnership/Trustee of a Superannuation fund

Tax File Number

- -

Australian Business Number

- - -

Section 3: Tax Residency

If you are not a resident of Australia for tax purposes, or a resident of Australia for tax purposes but have additional tax residencies, please complete this section.

Is the Investor a tax resident of Australia?

No Yes

Is the Investor a tax resident of another country or countries?

No Yes (Please provide Tax Identification Number or equivalent below)

If you are a tax resident of more than one other country, please list all relevant countries below.

A Tax Identification Number (TIN) is the number assigned by each country for the purposes of administering tax laws. This is the equivalent of a Tax File Number in Australia or a Social Security Number in the US. If a TIN is not provided, please list one of the three reasons specified (A, B or C) for not providing a TIN.

Reason A: The country of tax residency does not issue TINs to tax residents

Reason B: You have not been issued with a TIN

Reason C: The country of tax residency does not require the TIN to be disclosed

Country	TIN, or select a Reason if none	Reason A	Reason B	Reason C
Country	TIN, or select a Reason if none	Reason A	Reason B	Reason C
Country	TIN, or select a Reason if none	Reason A	Reason B	Reason C
Country	TIN, or select a Reason if none	Reason A	Reason B	Reason C
Country	TIN, or select a Reason if none	Reason A	Reason B	Reason C

Section 4: Declaration

By signing this request form, I/we make the following statements:

- declare that all the details given in this form are true and correct; and
- declare that, if signing under a power of attorney, I/we verify that, at the time of signing, I/we have not received a notice of revocation of that power.

We are committed to handling your personal information and sensitive information in a secure manner and in accordance with the *Privacy Act 1988 (Cth)*. For a copy of our Information Handling Policy, please visit humanfinancial.com.au/privacy.

Full name (print clearly in block letters)

Type of investor

Individual Joint investor 1 Director 1 Sole director and sole company secretary
Trustee 1 Partner 1 Power of Attorney

Signature

Date

DD MM YYYY

Note: If signing under a power of attorney, please provide an original certified copy of the power of attorney.

Full name (print clearly in block letters)

Type of investor

Joint investor 2 Director 2 Company secretary
Trustee 2 Partner 2 Power of Attorney

Signature

Date

DD MM YYYY

Note: If signing under a power of attorney, please provide an original certified copy of the power of attorney.

Sending your form

Please send this form to us via email or mail.

Mailing address

Email address

Human Financial
Level 24, 68 Pitt Street
Sydney NSW 2000

help@humanfinancial.com.au

If you have any questions or need help, please call us on **1300 048 135**.