Non-Resident Declaration & Banking Form

Please use this form to authorize direct deposit to a non-Canadian bank account and declare your country of residency for tax purposes.

Complete and submit **Sections 1 and 2** to declare your country of residence. This information will be used to determine the amount of tax HOOPP will deduct from your pension payments.

If you want HOOPP to deposit your pension payments into your non-Canadian bank account, please complete and submit **Sections 3 and 4** along with the required document.

For more information please see the Frequently Asked Questions (FAQ) below.

Please print clearly and ensure the information you provide is complete and accurate.

Section 1: Personal Information

First Name

Last Name

Date of Birth (MM/DD/YYYY)

Residential Address

City

Province / Territory / State

Postal Code / Zip Code

Country

Section 2: Tax Residency Status

Please provide the information below to confirm your residency status for tax purposes. If your country of residence has a tax treaty with Canada, you may qualify for a lower tax rate.

If you are not sure about your residency status for tax purposes, contact the Canada Revenue Agency or your tax advisor before completing this section.

Please check one of the following boxes to indicate your residency status for Canadian tax purposes. HOOPP will rely on the information provided in this section to determine the applicable tax deduction rate.

☐ **I am a resident of Canada for tax purposes.**

Please indicate your province or territory of residence for income tax purposes:

☐ **I am not a resident of Canada for tax purposes.**

Please indicate your country of residence for income tax purposes:

Section 3: Direct Deposit Information

Please provide your banking information to have your pension payments deposited electronically to a non-Canadian bank account, which must be in your name. When you submit your form to HOOPP, please attach a void cheque or direct deposit form from your financial institution with your name clearly indicated on it.

Please note that HOOPP will only pay in your local currency based on your country of residence (home address). Your financial institution may charge a fee for this type of transaction. You can ask them directly if any service fees will apply.

Bank Name

Bank Address

City

Province / Territory / State

Postal Code / Zip Code

Telephone Number

Country

Currency of Account

Taxpayer Identification Number (or equivalent)
Please note that this number is mandatory for the following currencies: AOS, ARS, AZN, BDT, BRL, CLP, COP, CRC, DOP, IDR, KZT, GTQ, MXN, PEN, PKR, PYG.

Please provide the following information for the country / region associated with your bank account. Your financial institution will be able to provide this information.

☐ **United States**	**Account Number:**	**ACH Routing Number:**
☐ **United Kingdom**	**Account Number:**	**Sort Code:**
☐ **Singapore / Hong Kong**	**Account Number:**	**Routing Code:**
☐ **Australia / New Zealand**	**Account Number:**	**BSB Code:**
☐ **Europe**	**IBAN:**	**SWIFT:**
☐ **Other Country:** _____	**Account Number or IBAN:**	**SWIFT:**
	☐ Chequing ☐ Savings	

Section 4: Authorization

I certify that the information I provided on this form is accurate and complete. I understand that my tax residency status will affect the amount of tax deducted from my pension payments. I agree to notify HOOPP if there is any change in my residency status, including if I move back to Canada.

I authorize HOOPP to deposit my HOOPP pension to my non-Canadian bank account I've provided above. I understand that HOOPP uses a service provider to process the transaction. I authorize HOOPP to collect, use and disclose my personal information for the purpose of administering my pension.

Signature

Date (MM / DD / YYYY)

Frequently Asked Questions

Why do I have to declare my tax residency?

HOOPP is required to deduct taxes on your pension. Using this form to declare your tax residency helps to ensure that you pay the appropriate amount of tax on your pension. For detailed information on determining your residency status, please visit the Canada Revenue Agency website.

What if my residence for tax purposes changes?

If your tax residency changes, notify HOOPP right away, as it may affect the tax deducted from your pension. Please keep your address up to date, and if you return to Canada, contact HOOPP to update your banking to a Canadian account.

When will this change be reflected in my pension payment(s)?

To ensure a timely monthly payment, HOOPP must receive your banking information prior to the middle of the month. If we receive this information later, we will set up your direct deposit for the following month's pension payment. Please refer to the pension payment schedule on **hoopp.com** for more information.

Can I set up my banking information online?

No, you cannot set up your banking information online. HOOPP requires this form to be completed to set up your payments, along with a void cheque or direct deposit form from your financial institution with your name clearly indicated on it. You can submit to HOOPP by mailing or sending a HOOPP Connect secure message.

Can I view my payments online?

Yes, you can view your latest pension payment amount online by signing in to HOOPP Connect. The amounts are displayed in Canadian dollars.

Can you tell me what my first pension payment will convert to in my local currency?

No, we cannot predict the exchange rates ahead of time as we will not know until the payment is processed each month. You can contact HOOPP Member Services after you receive your payment to confirm the exchange rate used.

Does HOOPP and / or my financial institution apply any handling fees?

HOOPP does not apply any handling fees for the transaction. However, it is important to note that financial institutions have different policies and may charge fees for this type of transaction. We recommend that you ask your financial institution about applicable fees.

Your privacy is important to us! At HOOPP, safeguarding the privacy of our members is a priority. We collect, use and disclose our members' personal information only for the purpose of administering the Plan; this refers primarily to administering pension benefits and paying pensions after retirement.

For more information on HOOPP's privacy policies and practices, please visit **hoopp.com/privacy**.

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