

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 Canada Revenue Agency (CRA). The CRA may share this information with the government of a foreign jurisdiction of which you are a resident for tax purposes, or to the U.S. government if you are an American citizen. 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. \_\_\_\_\_  
 Mr. \_\_\_\_\_

Surname \_\_\_\_\_ First name \_\_\_\_\_ Date of Birth (MM DD YYYY) \_\_\_\_\_

**2. ADDITIONAL SELF-CERTIFICATION INFORMATION**

Select all options that apply and complete the requested information.

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 provide your: SSN \_\_\_\_\_ ITIN \_\_\_\_\_

If you don't provide a SSN/ITIN of the United States, please provide the reason (A or C) in reference to the list below: \_\_\_\_\_

2.3  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 or C)
1			
2			
3			

If you have checked box 2.2 or 2.3 and you also have a Canadian social insurance number, please provide it: \_\_\_\_\_

List of reasons why the SSN/ITIN/TIN of a country was 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.*

**3. 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, profile update and legal and regulatory compliance purposes. I also agree to inform you of any changes in circumstances that may cause the information to become incomplete or inaccurate within 30 days of such change.

**4. SIGNATURE**

**Important Notice:** if the reason for not providing my SSN/ITIN/TIN is A or C, I understand that in accordance with Part XVIII and/or XIX of the Income Tax Act 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 a penalty from the CRA of \$500 for each foreign TIN not provided or \$100 in the case of a US TIN not provided as a result of my negligence. I agree to assume any liability directly or indirectly related to this situation.

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

\_\_\_\_\_  
Signature of Applicant