



TD Canada Trust Tax Residency Self-Certification – Individual

(Includes Sole Proprietor)

Part 1: Account Holder Information			
Account Holder Name:	Date of Birth (YYYY/MM/DD):	Social Insurance Number (or reason for not providing)	
Owner Name (for Sole Proprietor):			
Permanent Residence Address			
Suite number – street number and name:			
City or Town:	Province or State:	Postal Code/ZIP Code:	Country:
Mailing address (only if different from permanent residence address)			
Suite number – street number and name:			
City or Town:	Province or State:	Postal Code/ZIP Code:	Country:
Part 2: Country(ies) of Residence Declared for Tax Purposes			
Please complete sections A, B, C, and D confirming your country(ies) of residence for tax purposes.			
A. Are you a resident of Canada for tax purposes? <input type="checkbox"/> Yes <input type="checkbox"/> No			
B. Are you a resident of another country for tax purposes? <input type="checkbox"/> Yes <input type="checkbox"/> No			
C. If you answered "Yes" to B above, you are required to declare all countries in which you are considered a resident for tax purposes. For each country declared, please provide your Taxpayer Identification Number (TIN), if applicable.			
Country:		Taxpayer Identification Number (TIN):	

**If additional space is required, please copy this page, sign and include with your package.*

D. Are you a U.S. citizen?

Yes No

If yes, provide your TIN; including SSN: _____ or EIN (for Sole Proprietors): _____

Part 3: Declarations and Signature

I certify that the information given on this form is correct and complete. I will give TD Canada Trust a new form within 30 days of any change in circumstances that causes the information on this form to become incomplete or inaccurate.

Print Full Name

Signature

Capacity – Please indicate the capacity in which you are signing the form (e.g. 'Authorized Officer').

Date (YYYY/MM/DD)

Personal information is collected under the Income Tax Act to administer tax, benefits, and related programs. It may also be used for any purpose related to the administration or enforcement of the Act such as audit, compliance and the payment of debts owed to the Crown. It may be shared or verified with other federal, provincial/territorial government institutions, and foreign governments to the extent authorized by law. Failure to provide this information may result in interest payable, penalties or other actions. Under the Privacy Act, individuals have the right to access their personal information and request correction if there are errors or omissions. Refer to Info Source at www.cra.gc.ca/gncy/tp/nfsrc/nfsrc-eng.html, Personal Information Bank CRA PPU 005.

Part 4: FATCA & CRS Definitions

Tax Resident

Generally, an individual will be a **tax resident** of a jurisdiction if, under the laws of that jurisdiction, they pay or should be paying tax there because of their domicile, residence, or a similar criterion.

Taxpayer Identification Number (TIN)

A **taxpayer identification number**, often referred to by its abbreviation TIN, is a unique identifier made of letters or numbers that the jurisdiction assigns to an individual (this includes SIN). The jurisdiction uses the TIN in administering its tax laws to identify the individual.

U.S. Person

An individual is considered a U.S. person if they are a citizen or resident of the U.S. (including a greencard holder). If they spend considerable time in the U.S. in one year or over a period of years, they may also be considered a U.S. person.

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