

Change in Tax Residency – Information required

You have advised us that there has been a change to the foreign tax residency details which you provided to us. Before we update these details, we are required to obtain an explanation and supporting documentation from you, regarding this change. Please complete the sections below and provide the documentation set out on page 2. If the change relates to more than one entity or person, please complete an additional form for each.

Please note that if you previously advised that you were a US tax resident, if this was because you were a US citizen, you will remain a US tax resident unless you are no longer a US citizen.

SECTION 1: ACCOUNT HOLDER DETAILS

Full name of account holder:	
Member number:	
Name of person that the change relates to (if not the account holder listed above):	

SECTION 2: REASON/S FOR CHANGE

Previous country/ies of tax residence:	
Current country/ies of tax residence:	
Reason/s why no longer a foreign tax resident of applicable country:	

SECTION 3: DECLARATION

I declare that:

1. I am the account holder named above, or, the account holder is a minor and I am authorised to sign on their behalf, or, I am otherwise authorised to sign this declaration on behalf of the account holder;
2. I have consulted an independent advisor where necessary and acknowledge that IMB has not provided any advice;
3. I will provide IMB with any further information that it may request regarding the details on this form;
4. I will notify IMB within thirty (30) days if there is any change to my circumstances which causes the above details to become incorrect or incomplete;
5. The information I have provided above is true, correct and complete;
6. I understand that the provision of false, inaccurate or incomplete information may constitute an offence and penalties may apply.

Name:		Date:	____/____/____
Signature:		Position: (Entities only)	

OFFICE USE ONLY

Scan and email form and copies of supporting documents to the Foreign Tax Resident mailbox – foreigntaxres@imb.com.au
Create Prosper Note and attach copy of form and identification documents

Change in Tax Residency – Supporting Documents to provide

INDIVIDUALS AND SOLE TRADERS

An original **Australian photo ID** (such as driver's licence, passport or photo card)

OR

An original or certified copy of your **Certificate of Residency** issued by an Australian Government department.

ENTITIES

Any **official documentation** (original or certified copy) issued by an Australian Government department which includes:

1. The name of the entity
2. The entity's principal place of business, within Australia

AND

Any other documentation in support of the entity's change in tax residency.