

EUSD - Exemption Declaration (Form B)

Please complete in BLOCK CAPITALS and black ink. If you need help to complete this form, please call us on 0800 289 936 (Freephone UK only) or +44 (0) 1624 645000

Please **only** complete this form if you believe you are Exempt and should not be subject to Retention Tax or Exchange of Information.

About you ("the Accountholder")

Name	<input type="text"/>
Residential Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>
Account Number	<input type="text"/>

Second Party to the Account (Only complete where more than one Accountholder)

Name	<input type="text"/>
Residential Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>
Account Number	<input type="text"/>

Your declaration ("the Accountholder")

Please tick the appropriate box below to confirm why you believe you are exempt:

- ☐ 1. I am taxed on interest earned in Jersey or the Isle of Man only if it is remitted into my country of residence. I confirm that no taxable remittances are made into my country of tax residence and I also confirm that if I should subsequently make a taxable remittance, I will inform the relevant tax authority. If my tax circumstances change and I am no longer eligible to be exempt, I agree to inform Fairbairn Private Bank immediately, in which case I will be subject to either retention tax on interest received or automatic exchange of information.

- ☐ 2. I permanently live outside the EU and therefore am not subject to the EUSD.

Do you want us to amend our mailing address records to show the residential address you have stated above?

- ☐ No, please continue to send correspondence to the address to which you sent this letter which I confirm is a c/o address only
- ☐ Yes, please send all future correspondence to my current residential address as confirmed above

Please note: If you confirm you are living outside of the EU and we do not already hold documentary evidence of your residential address, we will require sight of a certified copy or original utility bill or bank statement.

Please tick the appropriate box below to confirm why you believe you are exempt:

- ☐ 1. I am taxed on interest earned in Jersey or the Isle of Man only if it is remitted into my country of residence. I confirm that no taxable remittances are made into my country of tax residence and I also confirm that if I should subsequently make a taxable remittance, I will inform the relevant tax authority. If my tax circumstances change and I am no longer eligible to be exempt, I agree to inform Fairbairn Private Bank immediately, in which case I will be subject to either retention tax on interest received or automatic exchange of information.

- ☐ 2. I permanently live outside the EU and therefore am not subject to the EUSD.

Do you want us to amend our mailing address records to show the residential address you have stated above?

- ☐ No, please continue to send correspondence to the address to which you sent this letter which I confirm is a c/o address only
- ☐ Yes, please send all future correspondence to my current residential address as confirmed above

Please note: If you confirm you are living outside of the EU and we do not already hold documentary evidence of your residential address, we will require sight of a certified copy or original utility bill or bank statement.

EUSD - Exemption Declaration (Form B)

Please complete in BLOCK CAPITALS and black ink. If you need help to complete this form, please call us on 0800 289 936 (Freephone UK only) or +44 (0) 1624 645000

☐

3. I attach a Tax Exemption Certificate issued by the tax authority in the country in which I am tax resident

☐

4. I am exempt from income tax in my country of residence. Please provide additional details and reasons below:

Signature

Date of signature

☐

3. I attach a Tax Exemption Certificate issued by the tax authority in the country in which I am tax resident

☐

4. I am exempt from income tax in my country of residence. Please provide additional details and reasons below:

Signature

Date of signature

Please return your completed form to Fairbairn Private Bank using the reply paid envelope enclosed for your convenience.