

Foreign Accounts Tax Self Certification Form

Wealthport (Pty) Ltd (2012/025878/07)

Wealthport (Pty) Ltd ("Wealthport") is an Authorised Financial Services Provider (FSP No. 44158)
 Ballyoaks Office Park, 35 Ballyclare Drive, Bryanston Johannesburg • Postal address: Postnet Suite 451, Private Bag X51,
 Bryanston, 2021

Contact number: 010 593 3103 • Facsimile: 087 231 6972 • Email: admin@wealthport.co.za



Important Information:

- Please read the latest Terms and Conditions applicable to this investment. This is available from your Financial Advisor, the Client Services Centre at 010 593 3103 or at www.wealthport.co.za
- The following information is required as part of the compliance obligations under the Foreign Account Tax Compliance Act ("FATCA") Kindly complete this form and submit applications for processing to admin@wealthport.co.za or fax to 087 231 6972.
- Please inform Wealthport immediately should any of the details change in the future or if there are any changes in circumstances that could affect your tax residency or FATCA classification.

1. Beneficial owner details (the Client)

First name:

Surname / Legal Entity name:

ID / Registration number:

Email address:

	Countries of Citizenship	Passport Number
1		
2		
3		
4		

2. Tax Details

Are you a resident for tax purposes anywhere other than South Africa? Yes No

If you have answered 'Yes' please complete the table below:

	Country(ies) of Tax Residency	Tax Number
1		
2		
3		
4		

3. Declaration and undertaking

The governments of South Africa and the United States of America (USA) have agreed to share information in respect of financial assets held within their boundaries. The overall aim is to improve information gathering from financial institutions. What this means for you as a client is that Wealthport is legally obliged to provide the South African Revenue Service (SARS) with certain information you provide to Wealthport when you invest or transact with us. SARS in turn will pass such information to the Internal Revenue Services of the USA.

- I hereby agree to provide all documentation and information required in terms of Wealthport's business rules. I confirm that all information provided herein is true and correct and that I have read and understood the contents of this form.
- I understand that Wealthport may be legally obliged to disclose the information contained in this form to the South African Revenue Services, and do not object to this disclosure.

Signature of Beneficial Owner:

Date:

Capacity of Signatory (if not the beneficial owner): _____