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Aware Investment Fund
Individuals and sole traders

Use this form to provide the tax residency status of an individual if it hasn't been previously provided or if you have changed your tax residency.

You may be treated as a non-Australian taxpayer if not all information requested is provided.

Please use a dark pen and CAPITAL letters. Insert (when you have to choose an option). If you have any questions, please contact our Member Support Team on 1300 650 873.

i * Indicates that providing this information is mandatory. Not doing so may delay the processing of your request.

Step 1: Personal details

Member number*

Title

Date of birth*

First name*

Middle name

Last name*

Home address* (must not be a PO Box)

Suburb*

Country*

Postcode*

Mobile number*

Daytime contact number

i Tax Residency rules differ by country. Whether an individual is tax resident of a particular country is often (but not always) based on the amount of time a person spends in a country, the location of a person's residence or place of work. For the US, tax residency can be as a result of citizenship or residency.

Step 2: Tax information

Please answer both tax residency questions:

1. Are you a tax resident of Australia?

Yes No **28427 Td ()Tj EM**

Step 3: Read our privacy information

The personal information provided on this form is collected and held by Aware Super, in accordance with the Australian Privacy Principles of the Privacy Act 1988 (Cth), for the purpose of administering accounts and providing services associated with fund membership. For further information about how personal information is handled, please call us on 1300 650 873 or visit aware.com.au/privacy to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

Step 4: Declaration

Please read this declaration before you sign and date this form.

- The information I have provided is true and correct.
- I acknowledge that the information contained in this form may be reported to the Australian Taxation Office and exchanged with tax authorities of another jurisdiction or jurisdictions in which I may be a tax resident where those jurisdictions have entered into Agreements to exchange Financial Account Information.
- I undertake to advise Aware Financial Services of any change in circumstances which affects my tax