

Guidelines for completion of Form NR301

These guidelines are relevant to our ISAs and Dealing accounts for **individuals** only.

Information required		Detail
Part 1	Legal name of non-resident taxpayer	Enter your first and last name.
Part 2	Mailing address including Apt no. – street no., street name and city; State, province or territory; Postal or zip code; Country	In the relevant boxes enter the details of your permanent address. This is the address of the country where you claim residency for the purposes of that country's income tax. Please do not abbreviate the country's name. Please insert United Kingdom (in full, not U.K.) for England, Scotland, Wales and Northern Ireland. Jersey, Guernsey and the Isle of Man should be accounted for separately.
Part 3	Foreign tax identification number	Enter your national insurance number or foreign tax ID if you are not a UK resident.
Part 4	Recipient type	Tick the box for the relevant recipient type.
Part 5	Canadian tax number (if you have one)	Only enter a social insurance number or individual tax number if you are a Canadian resident or taxpayer.
Part 6	Country of residence for treaty purposes	Enter your country of residence for tax purposes. Please do not abbreviate the country's name. Please insert United Kingdom (in full, not U.K.) for England, Scotland, Wales, and Northern Ireland. Jersey, Guernsey and the Isle of Man should be accounted for separately.
Part 7	Type of income for which the non-resident taxpayer is making this declaration	Tick box for interest, dividends and/or other royalties.
Part 8	Certification and undertaking	Sign and date the form making sure you use the date format YYYY/MM/DD. Print the name and position/title of the authorised person (if the form is not signed by the beneficial owner) and telephone number. Scan and email the form to: dealingservices@youinvest.co.uk If the form is signed under a duly authorised power of attorney for the beneficial owner or account holder, please also attach a copy of the power of attorney form when emailing the NR301 to us. Please note: The position/title of authorised person is only required if signed for a corporation or trust on behalf of a minor or POA. If the form is completed by an individual as the beneficial owner, it can be left blank or say beneficial owner.

Additional Information

A completed NR301 form is valid for three years. However, if any of the information you gave us changes (for example, you move house) you'll need to submit a new form within 30 days.

If you prefer, you can post your form to us at the below address:

AJ Bell Youinvest
Tax Management Team
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

It normally takes us three days to process an NR301, if all the information is correct. You'll receive a secure message from us when we've processed your form, or if we need further information from you.