

Guidelines for completion of form W-8BEN

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

Information required			Detail
Part I	Box 1	Name of individual who is the beneficial owner	Enter your full name.
	Box 2	Country of citizenship	Enter your country of citizenship. If you are a dual citizen enter the country where you are both a citizen and a resident at the time you complete this form. Please do not abbreviate the country 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.
	Box 3	Permanent resident address	Enter the details of your permanent resident address. This is the address in the country where you claim to be resident for the purposes of that country's income tax. Please do not abbreviate the country name.
	Box 4	Mailing address if different from above	Please enter mailing address if applicable. Otherwise please leave blank.
	Box 5	US taxpayer identification number	Please complete when appropriate.
	Box 6	Foreign Tax Identifying number	Please leave blank.
	Box 7	Reference number	Please enter your Dealing and/or ISA account numbers.
	Box 8	Date of birth	Please enter your date of birth in the format of MM-DD-YYYY.
Part II	Box 9	Residency of beneficial owner	Complete the blank section with your country of residence. This is the country where you claim to be resident for the purposes of that country's income tax. Please do not abbreviate the country 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.
	Box 10	Special rates and conditions	Please leave blank.

Information required			Detail
Part III	Box 11	Certification	<p>Sign and date the form making sure you use the date format MM-DD-YYYY. Print the name of the signer (and the capacity if the form is not signed by the beneficial owner) and scan and email the form to: dealingservices@youinvest.co.uk</p> <p>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 W-8BEN to us.</p>

For more detailed guidance notes please visit www.irs.gov and select:

Forms & Instructions

Current Year

Use the search option to find Inst W-8BEN and Form W-8BEN

Additional information

A completed W-8BEN 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 a W-8BEN, 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.