

# Morgan Stanley

## CRS Self-Certification

### Individual

#### Please read before completing this form:

Tax authorities require Morgan Stanley to collect and report certain information about its account holders' tax residency status. To enable Morgan Stanley to comply with its obligation to report to the relevant tax authorities, you are required to state the residency for tax purposes of the person or persons identified as the holder(s) of an Account. On this form these persons are cumulatively referred to as the "Account Holder (s)". For joint accounts, each account holder should complete a separate certification.

## I. Account Holder Information

First Name		Family Name/Surname	
Current Residence Address			
City/Town	State/Province	Postal Code	Country (do not abbreviate)
Date of Birth (DD/MM/YYYY)		City/Town of Birth	Country of Birth

## II. Tax Residence

Please provide details for all jurisdictions in which the Account Holder is resident for tax purposes. If you have no residence for tax purposes then enter "none".

**Taxpayer Identification Number (TIN)** - A taxpayer identification number (TIN) or functional equivalent should be provided for each country of residence for tax purposes. A TIN is a unique combination of letters and/or numbers assigned to the individual by a government, or its tax authorities, which is used to identify the account holder for the purposes of administering taxes. In some countries this may be a number that is specifically referred to as a TIN, while other countries may use other numbers (such as a social insurance number) to identify their residents for tax purposes.

Country of Tax Residence 1	Taxpayer Identification Number 1	TIN Unavailable: <input type="checkbox"/>
Country of Tax Residence 2	Taxpayer Identification Number 2	TIN Unavailable: <input type="checkbox"/>
Country of Tax Residence 3	Taxpayer Identification Number 3	TIN Unavailable: <input type="checkbox"/>

**TIN Unavailable Explanation(s)** – If any "TIN Unavailable" box is checked, please provide an explanation.

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I certify the tax residence countries provided represent all countries in which I am considered a tax resident.

If Account Holder has additional countries of tax residence please attach a statement to this form containing the Country and TIN for each such additional country.

## III. Declarations and Signature

- I understand that the information supplied by me is covered by the full provisions of the terms and conditions governing my/the Account Holder's relationship with Morgan Stanley setting out how Morgan Stanley may use and share the information supplied by me to Morgan Stanley.
- I acknowledge and agree that information contained in this form and information regarding the account(s) set out above may be reported to the tax authorities of the country in which the account is maintained and those tax authorities or Morgan Stanley may provide the information to the country or countries in which I/the Account Holder am/is resident for tax purposes.
- Where required, I agree to provide a waiver to allow this information to be reported to the competent authorities.
- I undertake to advise Morgan Stanley promptly of any change in circumstances which causes the information contained herein to become incorrect and to provide Morgan Stanley with a suitably updated Certification within 30 days of such change in circumstances.
- I certify that I am the Account Holder (or am authorised to sign for the Account Holder) of all the account(s) to which this form relates.
- I declare that all statements made on this form/in this declaration are, to the best of my knowledge and belief, true correct and complete.
- I acknowledge and agree Morgan Stanley may disclose and transfer information contained in this form in accordance with the Morgan Stanley Privacy Policy to its affiliates, representatives, agents and third party vendors for the purposes of automatic exchange of information relating to my Account(s).
- I understand Morgan Stanley is able to, on my behalf, share this information with other Financial Institutions who invest, administer or otherwise manage any Financial Assets I acquire through my Morgan Stanley Account(s). I authorise and consent to Morgan Stanley sharing this information with those other Financial Institutions who require this information.

Name of Signer	Signature
Capacity in which Signing (if not signed by account holder)	
Date (DD/MM/YYYY)	