W-8BEN – Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)

For Joint Accounts, each account holder must complete a separate form. A form W-8BEN must be completed correctly without any alterations. If you make a mistake, please start over using a new form. Do not use liquid paper or any other correctional tool.

All W Forms must be completed in English.

A. Please read this section and the associated instructions to ensure you are completing the correct W form.

B. PART I (Identification of Beneficial Owner)

1. Full Name (First Name and Last Name).
2. Country of Citizenship
3. Insert full street address on the first line, and the City or town, state or province including post code on the 2nd line.

DO NOT USE:
- PO Box or C/O address
- Name of a third party
- Address at a Financial Institution
- US address

C. PART II (Claim of Tax Treaty Benefits)

1. Only complete this section if you are resident in a treaty country and entitled to claim tax treaty benefits, ie if you are receiving fixed or determinable, annual or periodical (FDAP) income, for example dividend payments, and the payment is from sources within the US. If you have any queries regarding your eligibility to claim tax treaty benefits, we suggest that you seek independent tax advice.

D. PART III (Certification)

1. Please sign the form and print your name on the line below your signature.
2. Please date the form using the MM/DD/YYYY format.
3. If you are signing on behalf of the person stated on Line 1, please tick here ‘I certify that I have the capacity to sign for the person identified on line 1 of this form’.

Note: This form cannot be signed under a Power of Attorney (POA) unless the POA document specifically mentions that the agent/attorney is able to sign on tax matters or on tax forms (and a copy is provided, or held), or alternatively if an IRS Form 2848 is provided.

* HSBC are unable to provide any Tax advice. If you require any advice please refer to an independent tax advisor.