

## CRS and FATCA certification form - Individuals

The completion of this form is a compulsory legislative requirement.

- You are required to complete this form if:
  - you are an individual investor declaring whether or not you have tax responsibilities outside of South Africa
  - you are a **controlling person** of a managed **investment entity** outside of a CRS **participating jurisdiction** or a **passive non-financial entity**; or
  - your tax responsibilities outside of South Africa have changed.
- Send the completed form to [crs@psg.co.za](mailto:crs@psg.co.za).
- If you need assistance, please contact your financial adviser or one of our client service consultants on 0860 774 774 or at [clientservice@psg.co.za](mailto:clientservice@psg.co.za).

If an investor or any controlling person of an entity has tax responsibilities in another country, PSG is required to provide the South African Revenue Service (SARS) with information that they may share with the relevant foreign tax authority in terms of the Foreign Account Tax Compliance Act (FATCA) and the Organisation for Economic Cooperation and Development's (OECD) Common Reporting Standard (CRS).

We cannot help you complete this form because it may be seen as providing tax advice, which we are not allowed to do. If you need help completing this form, we recommend that you get independent tax advice from a tax professional.

Many of the terms used in this form have specific technical meanings. If a word or phrase is in **bold**, you should look it up in the CRS and FATCA Certification Form Glossary [on our website](#).

### Investor details

If you are completing this form as the **controlling person** of an **entity**, please provide the entity details here.

Name and surname/Name of company or trust	<input type="text"/>
ID/Passport number/Registration number	<input type="text"/>
Investment number	<input type="text"/>

### Personal details

Title	<input type="checkbox"/> Ms <input type="checkbox"/> Mr <input type="checkbox"/> Dr <input type="checkbox"/> Prof <input type="checkbox"/> Adv <input type="checkbox"/> Other	<input type="text"/>
First names	<input type="text"/>	Surname <input type="text"/>
Date of birth	<input type="text"/>	
Country of birth	<input type="checkbox"/> South Africa <input type="checkbox"/> Other	<input type="text"/>
Country of citizenship	<input type="checkbox"/> South Africa <input type="checkbox"/> Other	<input type="text"/>
Country of Residence	<input type="checkbox"/> South Africa <input type="checkbox"/> Other	<input type="text"/>
ID/Passport number	<input type="text"/>	
Passport country of issue	<input type="text"/>	



## Country of residence for tax purposes

Are you a registered tax payer in South Africa? ☐ Yes ☐ No

South African income tax number

Do you have tax obligations in another country? ☐ Yes ☐ No

If yes, please indicate all countries in which you are a tax resident or have tax responsibilities, or both.

	Country(ies) of tax residency	Tax Identification Number (If you do not have a TIN, please provide reason)
1.		
2.		
3.		

If you are investing as an individual and you are a **US national** or **US person** you must also complete an IRS W-9 form [available here](#).

## Signatures

By signing this form, I confirm that:

- I have given PSG accurate information.
- I will inform PSG immediately if there is any change in circumstances that affect my tax status or tax obligations or that may change the information provided in this form. I will also provide PSG with an updated self-certification form within 90 days of the change in circumstances.
- The information provided in this form and any other information regarding the investor and any **reportable account** may be provided to SARS and exchanged with tax authorities of other country(ies) or jurisdiction(s) in which the investor may be tax resident in accordance with intergovernmental agreements to exchange financial account information.

Investor / controlling  
person signature

Date

Designation\* (if you are the controlling person)

\*Please indicate the capacity in which you are signing the declaration, e.g. trustee/director/beneficiary etc.

## Contact details

**Physical address:** Building 1, The Ingress, Corner of Magwa and Lone Creek Crescents, Waterfall City, Waterfall, 2090, Gauteng, South Africa

**Postal address:** PO Box 61295, Marshalltown, 2107, South Africa

**Sharecall:** 0860 774 774

**Email:** [clientservice@psg.co.za](mailto:clientservice@psg.co.za)

**Website:** [www.psg.co.za](http://www.psg.co.za)