



## Application Supplement – Individuals

Additional information required for Non-superannuation money investments in Guaranteed Annuity, Guaranteed Annuity (Liquid Lifetime) and CarePlus.

The Australian Government recently passed laws to implement the requirements of the OECD’s Common Reporting Standard (CRS). From 1 July 2017, these laws require Australian financial institutions like Challenger to obtain additional information from investors regarding their tax residency. Information about investors that are foreign tax residents must be reported to the Australian Tax Office (ATO). The information on this form is required in order to process your application.

This form is required to be submitted where, in relation to your investment, we received an application form issued prior to 1 July 2017 which did not include the new CRS requirements, or we received a form issued on or after 1 July 2017 with incomplete tax residency information.

If you require further information on the CRS, please visit the ATO’s website [www.ato.com.au](http://www.ato.com.au)

If you are investing with Non-superannuation money, please complete the following sections, sign and provide it with the application form.

### Investor 1 Tax information – please answer BOTH tax residency questions

Are you an Australian resident for tax purposes?  Yes  No

Are you a tax resident of another country?  Yes  No

If you are a tax resident of a country other than Australia, please provide your Tax Identification Number (TIN) or equivalent below. If you are a tax resident of more than one country, please list all relevant countries below.

1. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
2. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
3. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
4. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>

Reason A – The country of tax residency does not issue TINs to tax residents.

Reason B – I have not been issued with a TIN.

Reason C – The country of tax residency does not require the TIN to be disclosed.

### Investor 2 Tax information – please answer BOTH tax residency questions

Are you an Australian resident for tax purposes?  Yes  No

Are you a tax resident of another country?  Yes  No

If you are a tax resident of a country other than Australia, please provide your Tax Identification Number (TIN) or equivalent below. If you are a tax resident of more than one country, please list all relevant countries below.

1. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
2. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
3. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>
4. Country	<input type="text"/>	TIN	<input type="text"/>	If no TIN, list reason A, B or C	<input type="checkbox"/>

Reason A – The country of tax residency does not issue TINs to tax residents.

Reason B – I have not been issued with a TIN.

Reason C – The country of tax residency does not require the TIN to be disclosed.

I/We declare that all details provided are true and correct and I/we indemnify Challenger Life Company Limited (ABN 44 072 486 938) (AFSL 234670) against any liabilities whatsoever arising out of it acting on any incorrect or misleading information provided by me/us in connection with this application supplement.

#### Investor 1

Signature (please sign)

Date / /

Print name

#### Investor 2

Signature (please sign)

Date / /

Print name

