

You must complete and return this form if you wish to trade shares listed in the United States on your stockbroking account. You will also receive dividends and interest on US shares at reduced rates of tax. Please note:

- Your W-8BEN form is valid for three calendar years after the year in which it was signed. We will contact you when you need to renew it
- You can fill in the form on your computer or complete it using black/blue ink. Please ensure that you sign it and then return it by either post or email to one of the addresses below
- If you make a mistake, either correct it and initial the change, or use a new form
- Make sure the W-8BEN form is printed on its own, on a blank piece of paper. Forms with anything printed on the back, including this page, will not be accepted

Return your W-8BEN form by email to [id-verification@ig.com](mailto:id-verification@ig.com) or by post to:

### IG Account Opening

Cannon Bridge House,  
25 Dowgate Hill  
London EC4R 2YA

1. Your full name as per your IG account

3. Your residential address. Do not use a PO Box, care of, or company address, and remember not to use abbreviations for the country

4. Can be left blank if your mailing address is the same as your residential address

5. Can be left blank if you don't have a US taxpayer identification number

7. Enter the account number of your IG stockbroking account. This can be found in the 'My Account' section of our platform

Sign the form – we cannot accept electronic signatures or forms not signed

Print your full name below, leaving 'Capacity in which acting' blank

**Form W-8BEN**  
(Rev. February 2014)  
Department of the Treasury  
Internal Revenue Service

**Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)**

► For use by individuals. Entities must use Form W-8BEN-E.  
► Information about Form W-8BEN and its separate instructions is at [www.irs.gov/formw8ben](http://www.irs.gov/formw8ben).  
► Give this form to the withholding agent or payer. Do not send to the IRS.

OMB No. 1545-1621

**Do NOT use this form if:**

- You are NOT an individual . . . . . W-8BEN-E
- You are a U.S. citizen or other U.S. person, including a resident alien individual . . . . . W-9
- You are a beneficial owner claiming that income is effectively connected with the conduct of trade or business within the U.S. (other than personal services) . . . . . W-8ECI
- You are a beneficial owner who is receiving compensation for personal services performed in the United States . . . . . 8233 or W-4
- A person acting as an intermediary . . . . . W-8IMY

**Instead, use Form:**

**Part I Identification of Beneficial Owner** (see instructions)

1 Name of individual who is the beneficial owner  
Mr Joe Bloggs

2 Country of citizenship  
United Kingdom

3 Permanent residence address (street, apt. or suite no., or rural route). **Do not use a P.O. box or in-care-of address.**  
123 Fake Street  
City or town, state or province. Include postal code where appropriate.  
Example City, AB12 3CD

4 Mailing address (if different from above)  
City or town, state or province. Include postal code where appropriate.

5 U.S. taxpayer identification number (SSN or ITIN), if required (see instructions)

6 Foreign tax identifying number (see instructions)

7 Reference number(s) (see instructions)  
Account number: 1234567

8 Date of birth (MM-DD-YYYY) (see instructions)  
12/25/1980

**Part II Claim of Tax Treaty Benefits** (for chapter 3 purposes only) (see instructions)

9 I certify that the beneficial owner is a resident of United Kingdom within the meaning of the income tax treaty between the United States and that country.

10 **Special rates and conditions** (if applicable—see instructions): The beneficial owner is claiming the provisions of Article of the treaty identified on line 9 above to claim a % rate of withholding on (specify type of income):  
Explain the reasons the beneficial owner meets the terms of the treaty article:

**Part III Certification**

Under penalties of perjury, I declare that I have examined the information on this form and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:

- I am the individual that is the beneficial owner (or am authorized to sign for the individual that is the beneficial owner) of all the income to which this form relates or am using this form to document myself as an individual that is an owner or account holder of a foreign financial institution,
- The person named on line 1 of this form is not a U.S. person,
- The income to which this form relates is:
  - (a) not effectively connected with the conduct of a trade or business in the United States,
  - (b) effectively connected but is not subject to tax under an applicable income tax treaty, or
  - (c) the partner's share of a partnership's effectively connected income.
- The person named on line 1 of this form is a resident of the treaty country listed on line 9 of the form (if any) within the meaning of the income tax treaty between the United States and that country, and
- For broker transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions.

Furthermore, I authorize this form to be provided to any withholding agent that has control, receipt, or custody of the income of which I am the beneficial owner or any withholding agent that can disburse or make payments of the income of which I am the beneficial owner. I agree that I will submit a new form within 30 days if any certification made on this form becomes incorrect.

**Sign Here** J.Bloggs  
Signature of beneficial owner (or individual authorized to sign for beneficial owner) Date (MM-DD-YYYY)

Mr Joe Bloggs  
Print name of signer Capacity in which acting (if form is not signed by beneficial owner)

For Paperwork Reduction Act Notice, see separate instructions. Cat. No. 25047Z Form **W-8BEN** (Rev. 2-2014)

2. Your country of citizenship. Do not use any abbreviations, eg put 'United Kingdom' not UK

6. Optional. If you have a UK National Insurance number you can enter it here. If not, you can leave this section blank

8. Optional. If you enter your date of birth, please use the US format (MM-DD-YYYY)

9. Enter your country of residence in full. Do not use any abbreviations, eg put 'United Kingdom' not UK

Enter the date in US format (MM-DD-YYYY)

Once you have completed your details, please:

- Print the form, ensuring nothing is printed on the back
- If you spot a mistake, correct it and initial the change
- Sign the form, date it and return it by post or email to the addresses above



**Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)**

(Rev. February 2014)

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- You are a beneficial owner claiming that income is effectively connected with the conduct of trade or business within the U.S. (other than personal services) . . . . . W-8ECI
- You are a beneficial owner who is receiving compensation for personal services performed in the United States . . . . . 8233 or W-4
- A person acting as an intermediary . . . . . W-8IMY

**Part I Identification of Beneficial Owner (see instructions)**

1 Name of individual who is the beneficial owner		2 Country of citizenship	
3 Permanent residence address (street, apt. or suite no., or rural route). <b>Do not use a P.O. box or in-care-of address.</b>			
City or town, state or province. Include postal code where appropriate.		Country	
4 Mailing address (if different from above)			
City or town, state or province. Include postal code where appropriate.		Country	
5 U.S. taxpayer identification number (SSN or ITIN), if required (see instructions)		6 Foreign tax identifying number (see instructions)	
7 Reference number(s) (see instructions)		8 Date of birth (MM-DD-YYYY) (see instructions)	

**Part II Claim of Tax Treaty Benefits (for chapter 3 purposes only) (see instructions)**

9 I certify that the beneficial owner is a resident of \_\_\_\_\_ within the meaning of the income tax treaty between the United States and that country.

10 **Special rates and conditions** (if applicable—see instructions): The beneficial owner is claiming the provisions of Article \_\_\_\_\_ of the treaty identified on line 9 above to claim a \_\_\_\_\_ % rate of withholding on (specify type of income): \_\_\_\_\_

Explain the reasons the beneficial owner meets the terms of the treaty article: \_\_\_\_\_

**Part III Certification**

Under penalties of perjury, I declare that I have examined the information on this form and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:

- I am the individual that is the beneficial owner (or am authorized to sign for the individual that is the beneficial owner) of all the income to which this form relates or am using this form to document myself as an individual that is an owner or account holder of a foreign financial institution,
- The person named on line 1 of this form is not a U.S. person,
- The income to which this form relates is:
  - (a) not effectively connected with the conduct of a trade or business in the United States,
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- The person named on line 1 of this form is a resident of the treaty country listed on line 9 of the form (if any) within the meaning of the income tax treaty between the United States and that country, and
- For broker transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions.

Furthermore, I authorize this form to be provided to any withholding agent that has control, receipt, or custody of the income of which I am the beneficial owner or any withholding agent that can disburse or make payments of the income of which I am the beneficial owner. **I agree that I will submit a new form within 30 days if any certification made on this form becomes incorrect.**

**Sign Here**



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Signature of beneficial owner (or individual authorized to sign for beneficial owner)

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Date (MM-DD-YYYY)

\_\_\_\_\_  
Print name of signer

\_\_\_\_\_  
Capacity in which acting (if form is not signed by beneficial owner)