

Momentum Malta Retirement Trust

Change of Contact Details and Tax Residency Form

Please use this form to update Momentum of any changes to your contact details and/or address and Tax Residence country. Once completed, please send the original with supporting documentation as proof of residency as outlined below, to the address noted at the foot of the form.

Forename	Surname	Date of Birth
Member Number		UK National Insurance Number
Employment Status: <input type="checkbox"/> Employed <input type="checkbox"/> Self -Employed <input type="checkbox"/> Pensioner <input type="checkbox"/> Other _____		
Occupation*	Industry	Employer* (if applicable)

*If you did not indicate employed or self-employed above, please confirm details of last employment/self-employment held.

Change of Address and Contact Details:

Previous Address	New Address <input type="checkbox"/> Residential <input type="checkbox"/> Correspondence Date of change <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Previous Phone Number (Please include country code)	New Phone Number (Please include country code)
Previous Email Address	New Email Address

Change in country of tax residence

If your country of tax residence has changed, please complete the following:

Please confirm your new country of tax residence ¹	Tax Identification Number (Or equivalent)
Please confirm in what tax year this change of tax residence applies from <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Please attach a Tax Residence Certificate or valid Utility Bill (less than 6 months old) showing proof of your address.

1. If you are tax resident in more than one country / jurisdiction, please provide the information within this section for each country by completing a separate copy of this section 4 for each additional country / jurisdiction.

Change in country of tax residence (continued)

If a TIN is unavailable please provide the appropriate reason A, B or C where indicated below:

☐ Reason A: The country / jurisdiction where you are resident does not issue TINs to its residents

☐ Reason B: I am unable to obtain a TIN or equivalent number, and have provided an explanation below

☐ Reason C: No TIN is required as the domestic law of the relevant jurisdiction does not require the collection of a TIN issued by such jurisdiction

If you have already taken retirement benefits, please also confirm the following where relevant:

If Irish or UK Tax Resident (including Wales, Scotland or Northern Ireland)
Please confirm country of domicile for tax purposes:²

If Australian Resident, please confirm if ☐ Permanent Resident Visa or Australian Passport Holder (please attach copy of the Visa/Passport) ☐ Temporary Resident Visa Holder

If US Citizen, please tick ☐

2. Domicile: Your Domicile for Tax purposes is usually determined at time of your birth and is commonly (but not always) based on your father's domicile/permanent home at that time. It remains this domicile of origin unless you elected and formally amended your country of tax domicile. If you are unclear on your domicile you can confirm this with the tax authority in the country where you were born.

I confirm that the information provided in this form is to the best of my knowledge true and correct.

Member's Signature

Date