SiTCRS

CRS - Controlling Persons Information for Directors and/or Senior Officers

Account number	Rep code		

Provide the information on all controlling persons (use additional sheets if there are more than 3).

A Account Information						
Legal Entity Name (for account number a	bove)					
Director and/or Senior Off	icer 1					
Full name, including middle initial	Date of birth (mm-dd-yyyy)	Social Insurance Number (S.I.N		Controlling person type		
Address (number, street, apartment, rura	I route) (P.O. boxes only are not acceptable)	I			<u> </u>	
City	Province	Postal Code Country (do not abbreviate)			t abbreviate)	
If you do not have a TIN for one of the be Reason Code 1: I will apply or have appl Reason Code 2: My jurisdiction of tax re: Reason Code 3: Other - Specify (TIN is re	t of a jurisdiction other than Canada or the U elow noted jurisdictions, please indicate one ied for a TIN, but have not yet received it (TIN sidence does not issue TINs to its residents equired within a year) Reason Code	of the following reason codes: I is required within a year)				
	Reason Code _					
	Reason Code _					
Tick (✓) the option that applies to you No Yes. What Country? 2. Do you hold residence rights in ar Tick (✓) the option that applies to you No Yes. What Country? 3. Have you spent more than 90 day Tick (✓) the option that applies to you No Yes. What Country? 4. In which jurisdictions have you fi Tick (✓) the option that applies to you I have not filed personal taxes in I have filed in. Name of Country	ny other jurisdiction? bu. s in any jurisdiction during the previous bu. led personal income tax returns during to bu.	year? he previous year?				
Director and/or Senior Off	icer 2					
Full name, including middle initial	Date of birth (mm-dd-yyyy)	Social Insurance Number (S.I.N.		Controlling person type		
Address (number, street, apartment, rura	I route) (P.O. boxes only are not acceptable)					
City	Province	Postal Code		Country (do no	t abbreviate)	



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Are you (individual or entity) a tax resident for you do not have a TIN for one of the Reason Code 1: I will apply or have a Reason Code 2: My jurisdiction of tax Reason Code 3: Other - Specify (TIN in the code is the code	below noted jurisdictions, poplied for a TIN, but have not residence does not issue TIN	lease indicate one c t yet received it (TIN	of the following reason codes:	ist up to three juris	dictions and the	Tax Identification Number (TIN).	
1 TIN		_ Reason Code _	Other - specify				
2 TIN		_ Reason Code	Other - specify				
3 TIN		_ Reason Code	Other - specify				
If the jurisdiction(s) of tax residency Antigua and Barbuda, Bahamas, Bahra United Arab Emirates and Vanuatu. 1. Have you obtained residency ri Tick (✓) the option that applies to No Yes. What Country? 2. Do you hold residence rights in Tick (✓) the option that applies to No Yes. What Country? 3. Have you spent more than 90 of Tick (✓) the option that applies to No Yes. What Country? 4. In which jurisdictions have you	you listed above in Section in, Barbados, Cyprus, Domin ghts under a Citizenship by you. any other jurisdiction? you. ays in any jurisdiction during you.	n is one of the foll ica, Grenada, Malta y Investment (CBI)	owing countries please answ , Panama, Qatar, Saint Kitts and) or Residence by Investment rear?	er the 4 question I Nevis, Saint Lucia	s below. , Seychelles, Turk		
Tick (✓) the option that applies to you. ☐ I have not filed personal taxes in another jurisdiction. ☐ I have filed in. Name of Country If you have answered "Yes" in this section please verify that all the required countries and TINs have been provided.							
Director and/or Senior O	TTICER 3					I	
Full name, including middle initial			Date of birth (mm-dd-yyyy)	Social Insurance Number (S.I.N.)		Controlling person type	
Address (number, street, apartment, rural route) (P.O. boxes only are not acceptable)							
City	Province		Postal Code		Country (do not	t abbreviate)	
Are you (individual or entity) a tax resident of a jurisdiction other than Canada or the U.S.? No Yes If yes, list up to three jurisdictions and the Tax Identification Number (TIN). If you do not have a TIN for one of the below noted jurisdictions, please indicate one of the following reason codes: Reason Code 1: I will apply or have applied for a TIN, but have not yet received it (TIN is required within a year) Reason Code 2: My jurisdiction of tax residence does not issue TINs to its residents Reason Code 3: Other - Specify (TIN is required within a year) 1							
2 TIN							
3 TIN.			• •				
If the jurisdiction(s) of tax residency you listed above in Section is one of the following countries please answer the 4 questions below. Antigua and Barbuda, Bahamas, Bahrain, Barbados, Cyprus, Dominica, Grenada, Malta, Panama, Qatar, Saint Kitts and Nevis, Saint Lucia, Seychelles, Turks and Caicos Islands, United Arab Emirates and Vanuatu. 1. Have you obtained residency rights under a Citizenship by Investment (CBI) or Residence by Investment (RBI) offering for this country? Tick (✓) the option that applies to you. No Yes. What Country? 2. Do you hold residence rights in any other jurisdiction?							
Tick (\checkmark) the option that applies to \bigcirc No	you.						

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3.	Have you spent more than 90 days in any jurisdiction dur	ing the previous year?					
	Tick (\checkmark) the option that applies to you.						
	No						
	Yes. What Country?						
4.	In which jurisdictions have you filed personal income tax	returns during the pre	vious year?				
	Tick (\checkmark) the option that applies to you.						
	I have not filed personal taxes in another jurisdiction.						
	I have filed in. Name of Country						
If	If you have answered "Yes" in this section please verify that all the required countries and TINs have been provided.						
В	Certification and Undertaking						
As	As a representative authorized to sign on behalf of the legal entity, I:						
	 Certify that the information provided on this form is correct a 	ind complete;					
 Authorize Scotia iTRADE to provide, directly or indirectly, to any relevant tax authorities or any party authorized to audit or conduct a similar review of Scotia iTRADE for tax purposes, the information contained in this form and/or a copy of this form and to disclose to such tax authorities or such party any additional information that Scotia iTRADE may have in its possession that is relevant to my qualification claimed on the basis of this certification; 							
	 Acknowledge that information contained in this form and information regarding my Scotia iTRADE accounts (including information on account balances and payments received) may be reported to Canadian tax authorities, and that those tax authorities may provide the information to any additional country I have listed above as being a country in which I am (or another party to the account is) a resident for tax purposes; and 						
	Undertake to advise Scotia iTRADE immediately of any change in circumstances that causes the information contained herein to become incorrect and to provide Scotia iTRADE with a suitably updated Tax Residency Self-Certification form within 30 days of such change in circumstances.						
	Understand that it is my obligation to provide Scotia iTRADE any applicable TINs at the time they are requested. I understand that my failure to provide the applicable TIN(s) may result in my incurring regulatory fines, either directly or indirectly.						
Signing Authority for the Legal Entity							
5	Signature	Title	Print name	Date (mm-dd-yyyy)			

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