

# 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	Member Number
Date of Birth	UK National Insurance Number	

### Change of Address and Contact Details:

Previous address	<input type="checkbox"/> Residential	<input type="checkbox"/> Correspondence
New address	<input type="checkbox"/> Residential	<input type="checkbox"/> Correspondence
Date of change <input type="text" value="DDMMYY"/>		
Previous Phone Number (Please be sure to include country code)	New Phone Number (Please be sure to 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 <sup>1</sup>	Tax Reference Number
Please confirm in what tax year this change of tax residence applies from <input type="text" value="YYYY"/>	Please attach a Tax Residence Certificate or valid Utility Bill (less than 6 months old) showing proof of your address.

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: <sup>2</sup>
If Australian Resident, please confirm if <input type="checkbox"/> Permanent Resident Visa or Australian Passport Holder (please attach copy of the Visa/Passport) <input type="checkbox"/> Temporary Resident Visa Holder
If US Citizen, please tick <input type="checkbox"/>

#### 1. Tax Residence:

You will generally be considered tax resident in a country if you reside or live there for more than a prescribed number of days in a tax year (commonly 183 days) although a country may have other prescribed conditions to be deemed tax resident. The exact number of prescribed days or any other condition(s) is bespoke to each country and if unsure must be confirmed with your local Revenue authority. It is not always where you pay tax.

#### 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
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