

W-8BEN 表格簡要說明
Instructions for Completing Form W-8BEN

表格用途：本表格用於非美國人士向美國國稅局確認其外國納稅人身份。如果您所居住的國家為美國的稅務減免互惠國，您可能符合減稅或免稅的資格。請到美國國稅局網站 www.irs.gov 做進一步瞭解。請將您的W-8BEN表格原件寄到史考特證券，不要送到美國國稅局。

Purpose of Form: Form W-8BEN is used by a foreign person to establish foreign taxpayer status and, if applicable, to claim a reduced rate of, or exemption from, withholding tax as resident in a country that has a tax treaty with the United States. Please refer to the Internal Revenue Service (IRS) website at www.irs.gov for more information. Complete and return the original form to Scottrade. Do not send to the IRS.

第一部分：賬戶持有人資料 Part I: Identification of Beneficial Owner

第1欄: 姓名。Line 1: Enter your name.

第2欄: 國籍。Line 2: Enter Country of Citizenship.

第3欄: 永久住址（請勿使用郵政信箱PO Box 或轉寄位址，國家名稱請勿簡寫）。

Line 3: Enter your permanent residence address. Do not provide a P.O. Box or an "in care of" address. Do not abbreviate the name of the country.

第4欄: 通訊位址（如果與第3欄地址不同，國家名稱請勿簡寫）。

Line 4: Enter your mailing address only if it is different from the address on line 3. Do not abbreviate the name of the country.

請注意：如果使用美國通訊位址，客戶需提交下列檔：

- 有效護照或身份證影本
- W-8美國通訊位址說明表（最近90天內填妥並簽名）
- 在原居住國的居住證明，例如最近六個月內的銀行月結單或家用水電瓦斯費賬單。如果已經提供替代檔中的某一項檔，則無需再提供居住證明。

Additional Documentation Requirements if Using a U.S. Mailing Address

- A copy of valid passport or national ID card
- "W-8 Explanation of U.S. Mailing Address" form, completed and signed within the last 90 days
- Proof of residency in the home country, such as a bank statement or utility bill issued within the past six months.

This requirement is met if a document from the alternative list has been supplied.

第5欄: 美國稅號SSN, ITIN 或EIN號碼(如果沒有則無須填寫)。

Line 5: U.S. Taxpayer Identification Number (If available).

第6欄: 外國稅號(填入您居住報稅國所核發的稅務號碼。如未填則需在第8欄提供您的出生日期)。

Line 6: Foreign Taxpayer Identification Number. Provide the tax identification number issued to you by your jurisdiction of tax residence. If not provided, you must provide your date of birth on line 8.

第7欄: 列出所有您的史考特賬戶號碼(新賬戶此欄可以不填)。Line 7: List all account numbers at Scottrade.

Line 8: Date of birth (MM-DD-YYYY) .Provide your date of birth if you leave blank on line 6.

第8欄: 出生日期(月-日-年)。如果第6欄未填，則需填寫出生日期。

第二部分：稅務減免申報(如果適用) Part II : Claim of Tax Treaty Benefits (if applicable)

第9欄: 如果您的國家與美國是稅務減免互惠國，請在虛線上填寫國家名稱(請勿簡寫)。

Line 9: Enter the country where you claim to be a resident for income tax treaty purposes.

Please print the name of the country in the space provided. Do not abbreviate the name of the country.

第三部分：確認和簽名。

賬戶持有人簽名/ 日期 (月-日-年)

Part III: Certification

Beneficial Owner's signature / Date (MM-DD-YYYY)