



# Letter of Explanation for U.S. Mailing Address Attachment to Form W-8BEN

To: TD AMERITRADE, Inc.

Full Legal Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ ZIP/Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

**As I have certified on my Form W-8BEN, I am not a citizen or resident of the United States (U.S.) or other U.S. person for purposes of U.S. tax law. I have provided you with the following U.S. mailing address on Form W-8BEN for my correspondence because (please check appropriate box and provide additional information in the space provided):**

**Note: The mailing address on your account may not belong to a Registered Investment or Financial Advisor.**

- I live in the U.S. temporarily (*less than 183 days during the calendar year*). I am not a U.S. resident alien and want all of my mail to go to this address.
- I am physically residing at the U.S. address provided because: (*Please provide detailed explanation.*)  
\_\_\_\_\_
- The U.S. address is that of my \_\_\_\_\_. (*Please provide the name of the party residing at this mailing address.*)  
\_\_\_\_\_
- Other (*Please provide a detailed explanation of why you are using a U.S. address and who resides at this address.*)  
\_\_\_\_\_  
\_\_\_\_\_

**I have provided, or will provide, TD AMERITRADE, Inc. with any other documentation requested to support my claim of non-U.S. status and/or tax treaty benefits and will refresh such documentation upon request. I also acknowledge that: (1) I must advise TD AMERITRADE, Inc. if I become a U.S. citizen, U.S. resident or other U.S. person for U.S. tax law purposes; and (2) such change in my U.S. tax status will impact on the U.S. tax treatment of my income from U.S. investments, which are held by TD AMERITRADE, Inc.**

**Note: Each account owner must complete and sign a separate "Letter of Explanation for U.S. Mailing Address" if a U.S. mailing address is provided by the account owner.**

Printed Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

Relation to account:  Account Owner  Account Co-Owner  Other \_\_\_\_\_

