

STEP BY STEP

completing a Withholding Statement

Who is this form for?

This form allows a bare trust to hold and trade US and Canadian stocks.

NOTE: If the trust is a complex trust, you will need to complete a W-8BEN-E form. A trust is considered to be complex if the trustees have discretion over how and when income is paid to the beneficiaries.

Please do not complete your details on the form shown below - complete the form overleaf.

Trust Name
Enter your name followed by the trust name (usually the child's name plus 'Bare Trust', e.g. Mr A Smith - Robert Smith Bare Trust).

Withholding rates
Enter the full name of the child in the beneficiary column.

Trustee signature
Sign and date the form.

Beneficiaries
Enter the full name of the child and their address.

Income Split
Enter the full name of the child in the beneficiary column and how much income they should receive.
If there is one child, this should be 100%.
If there are two or more children, the income split must equal 100%.

WITHHOLDING STATEMENT			
ONLY COMPLETE THIS FORM IF YOUR ACCOUNT IS FOR A BARE TRUST			
Trust Name			
Beneficiaries (Please include full names and address)			
Income split between beneficiaries			
Beneficiary		Income split %	
1.			
2.			
3.			
4.			
5.			
Withholding rates			
Beneficiary		Dividends	Interest
1.		15%	0%
2.		15%	0%
3.		15%	0%
4.		15%	0%
5.		15%	0%
Trustee Signature		Date	
Please return this form together with a W-BEN in the name of the beneficiaries and a W-8IMY in the name of the trust. If you have any questions please call our helpdesk on 0117 900 9000.			

For help on completing this form, please contact our helpdesk on **0117 900 9000**.

Please return the form to:
Hargreaves Lansdown, 1 College Square South, Anchor Road, Bristol, BS1 5HL

WITHHOLDING STATEMENT

ONLY COMPLETE THIS FORM IF YOUR ACCOUNT IS FOR A BARE TRUST

Trust Name	
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Beneficiaries (Please include full names and address)

Income split between beneficiaries	
Beneficiary	Income split %
1.	
2.	
3.	
4.	
5.	

Withholding rates		
Beneficiary	Dividends	Interest
1.	15%	0%
2.	15%	0%
3.	15%	0%
4.	15%	0%
5.	15%	0%

Trustee Signature	Date

Please return this form together with a W-BEN in the name of the beneficiaries and a W-8IMY in the name of the trust. If you have any questions please call our helpdesk on 0117 900 9000.