



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

PO Box 2760 ■ Omaha, NE 68103-2760
Fax: 816-243-3769

To: TD Ameritrade, Inc.

Full Legal Name:

Home Address:
(no PO box or mail drop)

City:

State:

ZIP Code:

Mailing Address:
(if different from above)

City:

State:

ZIP Code:

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 a 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:

Title:

 Signature:

Date:

Relation to account: ☐ Account Owner ☐ Account Co-Owner ☐ Other _____

Investment Products: Not FDIC Insured * No Bank Guarantee * May Lose Value

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