

Checklist for completing the W-8BEN-E Form

Below is a checklist to assist in the completion of the W-8BEN-E form

- The most recent form available (July 2017) on the tax website has been used
- Name of organization that is the beneficial owner
- Country of incorporation
- Chapter 3 status (please select only one)
- Chapter 4 status (please select only one)
- Permanent address
- US or Foreign TIN Number
- Relevant sections completed between Part II and Part XXVIII (please refer to the W-8BEN-E Instruction)
- If claiming tax treaty benefits (Part III), 14 a, 14b & 15 must be fully completed.
- Only one director, trustee or executor signs each form
- The document has been dated
- Tick the box at the bottom certifying the form
- Send the form to the departmental address that your company is doing business with.

Common errors

- Remember to tick Part III Item 14a, 14b, as well as the relevant limitation on benefit (LOB) provision as the submission of this form is a claim to have a reduced withholding tax rate applied.
- Part III Item 15 must be filled out completely. Beneficial owner must claim correct provisions of Article and Paragraph, reduced rate per country treaty and any additional conditions per treaty.

Failure to complete any of the items identified in this checklist may result in the form being rejected by the University Controller's office and the full rate of withholding tax being applied.