

# STEP BY STEP COMPLETING A WITHHOLDING STATEMENT

HARGREAVES  
LANSDOWN

## 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 the name of the trust (usually 'The Bare Trust for' and the child's name, e.g. 'The Bare Trust for Robert Smith').

**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%.

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

**Trustee signature**  
Sign and date the form.

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, One College Square South, Anchor Road, Bristol, BS1 5HL.

0325

# 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.**