

acupay SPECIAL Update

Friday, 13 March 2015



Obtaining an IRS Form 6166 - Streamlined application for U.S. certificates of residence

A great deal of jurisdictions require a certificate of residence (COR) to process a tax relief request, especially in the world of equities and long form reclaims. The process of obtaining a COR directly from the U.S. tax authority is especially cumbersome and takes at least 8 weeks to receive.

Acupay has developed an easy-to-use online application tool called the 8802 Wizard to help investors and their representatives, including custodians, apply for an IRS Form 6166. The Wizard guides applicants through the steps necessary to request the IRS Form 6166, asking only the minimum amount of information required for each individual situation. For example, an individual will not be asked questions related to complicated fund structures. Once completed, investors will simply need to print out the form, sign, and either fax or email a scanned copy to Acupay. We will then handle all interaction with the IRS on the investor's behalf, ensuring that each request is processed in a timely manner for the quickest possible turnaround. There will be no need for any intervention by the custodian.

The IRS charges an \$85 processing fee to produce an IRS Form 6166, and there is a small Acupay processing / shipping and handling fee of \$15 for each application. Please note that one request can also cover certificates for multiple past years, enabling investors to recover excess tax withheld on past payments with one wizard application.

To get started, please visit [our 8802 Wizard website](#). For any questions or assistance with the application process itself, please contact Acupay's [A-Team](#).

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