



Forms W-8BEN-E and 8966 Final Instructions & Updated FFI Agreement

Closing the distance

Global Financial Services Industry



IRS Releases Final Instructions for Forms W-8BEN-E and 8966 & Updated FFI Agreement

The IRS has released the highly anticipated Instructions to accompany the final Forms W-8BEN-E and 8966. This follows the release of the Instructions to Form W-8IMY. The IRS additionally released an updated FFI Agreement for Participating FFIs and Reporting Model 2 FFIs. Deloitte's FATCA PMO is currently reviewing the new guidance and will provide comments in the near future.

Instructions to Form W-8BEN-E and Form 8966, and updated FFI Agreement for Participating FFIs and Report Model 2 FFIs are available for download.

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