

Attach a copy of the decree, order, judgement, or written separation agreement only if unable to obtain the spouse's or common-law partner's signature.

**Part I – Account holder**

Mr.  Ms. Last name: \_\_\_\_\_ First name: \_\_\_\_\_

Social insurance number: \_\_\_\_\_ Home Telephone: \_\_\_\_\_

Number and street: \_\_\_\_\_ Apartment/Suite: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Country: \_\_\_\_\_ Postal code: \_\_\_\_\_

**Division A – Origin of the transfer**

I am the account holder of the TFSA:

Name of the TFSA issuer: \_\_\_\_\_ Individual plan number and name: \_\_\_\_\_

Number and street: \_\_\_\_\_ Apartment/Suite: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Country: \_\_\_\_\_ Postal code: \_\_\_\_\_

**Division B – Description of amount to be transferred**

Please transfert \$ \_\_\_\_\_ which is all of the property form the TFSA identified in Division A.

Please transfert \_\_\_\_\_ % of the property form the TFSA identified in Division A.

Please transfert \$ \_\_\_\_\_ of the property form the TFSA identified in Division A.

**Division C – Destination of transfer**

Please transfer the above-mentioned TFSA property to the TFSA of my current or former spouse or common-law partner.

Name of the TFSA issuer: \_\_\_\_\_ Individual plan number and name: \_\_\_\_\_

Number and street: \_\_\_\_\_ Apartment/Suite: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Country: \_\_\_\_\_ Postal code: \_\_\_\_\_

**IDENTIFICATION of current or former spouse's or common-law partner**

Mr.  Ms. Last name: \_\_\_\_\_ First name: \_\_\_\_\_

Social insurance number: \_\_\_\_\_

\_\_\_\_\_  
Date (YYYY-MM-DD)

\_\_\_\_\_  
Account holder signature

Or See letter attached

In this form, the singular includes the plural and vice versa, and the masculine includes the feminine and vice versa.

**Part II – Transferee**

We accept the above-mentioned transfer.

1. When we will receive the property, we will credit it to the TFSA of the current or former spouse or common-law partner identified in Division C of Part I. The TFSA conforms, or will conform, to the plan identified as:

\_\_\_\_\_

Plan number and name

We will check the plan identification in Division C of Part I, and add or correct the information as necessary.

2. The plan is registered under the Income Tax Act or, if the plan is not registered, we will apply for such registration.

\_\_\_\_\_

Transferee's name

\_\_\_\_\_

Date (YYYY-MM-DD)

\_\_\_\_\_

Authorized person's signature

\_\_\_\_\_

Position or office

\_\_\_\_\_

Date (YYYY-MM-DD)

\_\_\_\_\_

Current or former spouse's or common-law partner's signature

Or See letter attached

**Part III – Transferor**

1. We transferred the following amount from the TFSA identified in Division A of Part I to the transferee named in Division C of Part I.

\$ \_\_\_\_\_

Amount (dollars and cents)      Date of transfert (YYYY-MM-DD)

2. The value of property in the annuitant's TFSA just before the transfer was? \$ \_\_\_\_\_ .

The information in this area is true, correct and complete.

\_\_\_\_\_

Transferor's name

\_\_\_\_\_

Date (YYYY-MM-DD)

\_\_\_\_\_

Authorized person's signature

\_\_\_\_\_

Position or office

**Part IV – Receipt by transferee**

We have received \$ \_\_\_\_\_ which we will credit to the account of \_\_\_\_\_

Current or former spouse's or common-law partner's name

\_\_\_\_\_

Transferee's name

\_\_\_\_\_

Date (YYYY-MM-DD)

\_\_\_\_\_

Authorized person's signature

\_\_\_\_\_

Position or office

In this form, the singular includes the plural and vice versa, and the masculine includes the feminine and vice versa.