

General information	
TRANSFEROR (client transferring securities)	ASSIGNEE (client receiving securities)
I, the undersigned, am giving/transferring the following security(ies)	To
_____	_____
Transferor's full name (in block letters)	Assignee's full name (in block letters)
_____	_____
Transferor's account number	Assignee's account number
_____	_____

Transferor's statement

I hereby state that the transfer is being conducted free of charge and involves no compensation in any form whatsoever. I assume all responsibilities related to this statement. I the undersigned, the transferor, give instructions to Desjardins Securities inc. (Desjardins Securities) to transfer to the assignee the securities mentioned below.

Description of the transfer

Establishing the value of transferred securities: For a **gift**, the value of the securities is established at fair market value on the day before the advisor receives the form. For a **tax rollover** between an individual and a company of which he or she is the sole owner, or between an individual and a trust, the value of the securities is based on book value, when an accountant's letter confirms the possibility of a rollover.

Description of the securities (equity securities, debt securities and mutual funds)	Quantity	For Desjardins Securities only	
		GRD request no.	IBM no.

The transfer of securities is accompanied by an instruction from the transferor to transfer to the assignee the amount of \$ _____

For Desjardins Online Brokerage only (all third party transfers):

Transfer fees apply to Transferor Assignee

Transferor's account number: _____

Assignee's account number: _____

Type of transfer (select the situation that applies to the transfer type requested)

Tax rollover:

- between an individual and his or her solely owned company (attach accountant's letter, REQ)
- between an individual and an inter-vivos trust (attach accountant's letter, trust document)

Gift:

- between an individual and his or her solely owned company (attach the *Registre des entreprises du Québec* (REQ))
- to a member of the immediate family
 - child sister or brother father or mother
 - spouse or so that the spouse may contribute to his or her RRSP* or TFSA
- to a charitable organization duly registered with the Canada Revenue Agency (CRA)

CRA registration number: _____

Other:

- Transfer type: _____
- Transfer circumstances: _____

Additional information

Is this an isolated situation for the transferor? _____

Have there been other requests in the last 24 months? If so, please provide details. _____

Signatures

Transferor's signature

Date (YYYY-MM-DD)

Assignee's signature

Date (YYYY-MM-DD)

Investment advisor's or representative's signature

Date (YYYY-MM-DD)

Branch manager's signature

Date (YYYY-MM-DD)

Signature of the compliance advisor in charge of approval

Date (YYYY-MM-DD)

*It is the client's responsibility to consult an independent tax advisor, if required, to determine the provisions of the securities transfer pursuant to the *Income Tax Act*.