

## Transfer from a Tax-Free Savings Account (TFSA) to Another TFSA on Breakdown of Marriage or Common-Law Partnership

- Transfers documented in this form must be made directly from a Holder's TFSA to the TFSA of the Holder's Spouse.
- A transfer of property that is not made under an Order can impact both the Holder's and the Spouse's TFSA contribution room.
- Attach a copy of the Order ONLY if unable to obtain the Spouse's signature. Some financial institutions may request supporting documentation in addition to the Holder's signature.
- Tick all boxes which apply. See the reverse of this form for definitions and more information.

### USE OF PERSONAL INFORMATION NOTICE

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#### Area I

##### Holder

Last Name		First Name	Initial(s)	Social Insurance Number	
Address		Date of Birth		yy	mm dd
City	Province	Postal Code	Business Tel. Number		Home Tel. Number

##### Part A Transfer from a TFSA

Individual Account Number and Name \_\_\_\_\_

Name of TFSA Issuer \_\_\_\_\_

TFSA Issuer's Address \_\_\_\_\_

##### Part B Description of amount to be transferred

(check one box only for asset transfer instructions and an additional box if asset list is attached)

- All in kind (as is)     Cash balance only as at date of transfer by Relinquishing Institution     Partial\*; see list below or check here  if list attached
- All in cash\*     All assets\*, but mixed in cash and in kind; see list below or check here  if list attached
- \* By signing in the signature section of Part C where I have requested a transfer in cash, I authorize the liquidation of all or part of my investments as indicated. I agree to pay any applicable fees, charges or adjustments as per disclosure related to this transfer.

	Investment Amount	Symbol and/or Certificate Number or Policy Number	Investment Description
<input type="checkbox"/> In Kind <input type="checkbox"/> In Cash <input type="checkbox"/> Shares/Units <input type="checkbox"/> Dollars <input type="checkbox"/> If a GIC, at maturity			
<input type="checkbox"/> In Kind <input type="checkbox"/> In Cash <input type="checkbox"/> Shares/Units <input type="checkbox"/> Dollars <input type="checkbox"/> If a GIC, at maturity			

##### Part C Destination of Transfer

Please transfer the above-mentioned TFSA property to the TFSA of my Spouse.

Individual Account Number and Name \_\_\_\_\_

Name of TFSA Issuer \_\_\_\_\_

TFSA Issuer's Address \_\_\_\_\_

Spouse's Last Name                      First Name                      Initial(s)

Social Insurance Number \_\_\_\_\_

See letter attached     See Order attached

#### Area II

##### Transferee/ Receiving Issuer

- We agree to the request for a transfer of property.
1. When we receive the property, we will credit it to the TFSA of the Spouse identified in Part C of Area I. The TFSA conforms, or will conform, to the TFSA identified as:
- TFSA Identification Number and Name \_\_\_\_\_

##### Part A Transferee/ Receiving Issuer

2. The arrangement is registered under the *Income Tax Act* as a TFSA, or, if the arrangement is not registered as a TFSA, we will apply for such registration pursuant to the requirements under the applicable section(s) of the *Income Tax Act*, which govern(s) TFSA registrations.
- Transferee's Name \_\_\_\_\_

##### Part B Receiving Spouse

Date \_\_\_\_\_ Authorized Person's Signature \_\_\_\_\_ Position or Office \_\_\_\_\_

Date \_\_\_\_\_ Spouse's Signature \_\_\_\_\_

See letter attached     See Order attached

**Area III**

**Transferor/  
Delivering Issuer**

1. We transferred \$ \_\_\_\_\_ from the TFSA identified in Part A of Area I to the Transferee named in Part C of Area I, on \_\_\_\_\_  
(date of transfer).
2. The market value of the property in the Holder's TFSA just before the transfer was  \$ \_\_\_\_\_ . or  see attached.
3. The information in this area is true, correct and complete.

\_\_\_\_\_  
Transferor's Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Person's Signature

\_\_\_\_\_  
Position or Office