



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.

Area I Holder

Last Name _____ First Name _____ Initial(s) _____ Social Insurance Number _____
 Address _____ Date of Birth _____
 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 _____

Date _____ Authorized Person's Signature _____ Position or Office _____

Part B Receiving Spouse

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 _____