

TRANSFER AUTHORIZATION FORM

(one required for each account being transferred)



SECTION 1									
CLIENT INFORMATION									
Last Name			First Name and Initials				Social insurance number		
Street Address					Apt #	City, Town or Post Office			
Province		Postal Code		Telephone (optional)			Email (optional)		
CLIENT DIRECTION TO RELINQUISHING INSTITUTION									
Name of relinquishing trustee									
Street Address				City, Town or Post Office		Province		Postal Code	
Type of Account (choose one)									
RRSP	Spousal RRSP		Locked-In RRSP		TFSA	Non-Registered			Account Number
Transfer the following: (choose ONE of the four options)		Full Account Transfer – In-Cash			Full Account Transfer – Mixed In-Cash & In Kind				
		Partial Account Transfer – Cash Balance as per below			Partial Account Transfer – Mixed In-Cash & In Kind as per below				
In-Cash	In-Kind	Net Amount (\$)		# of Securities	All	Security Name			
TRUSTEE TO WHICH ASSETS ARE BEING TRANSFERRED									
Name of issuer Computershare Trust Company of Canada						Account Number C			
Street Address 510 Burrard Street, 2 nd Floor				City, Town or Post Office Vancouver		Province BC		Postal Code V6C 3B9	
CLIENT AUTHORIZATION									
I hereby authorize the transfer of my investments as described above.									
Client's Signature						Year	Month	Day	
SECTION 2									
CONFIRMATION OF COMPUTERSHARE AS TRANSFEREE									
I. We agree to the above request for a direct transfer of property. When we receive the property, we will credit it to the Computershare RRSP or TFSA, as applicable, of the annuitant or holder of the account identified above.									
II. The plan or account is registered under the Income Tax Act or, if the plan or account is not registered, we will apply for such registration.									
Transferee's name Computershare Trust Company of Canada									
Computershare authorized person's signature						Year	Month	Day	
SECTION 3									
RELINQUISHING TRUSTEE (Do not issue T4RSP slip for the amount transferred)									
Name of relinquishing trustee									
I. We have transferred, as directed above, the assets from the: RRSP Spousal RRSP Locked-In RRSP TFSA Non-registered									
If spousal, complete the line below.									
Spouse or common-law partner Last name			Spouse or common-law partner First name and initials			Social Insurance Number			
I certify that the information given in this Area 3 is correct and complete.									
Relinquishing trustee's authorized person's signature						Year	Month	Day	

Privacy Notice

Computershare is committed to protecting your personal information. In the course of providing services to you and our corporate clients, we receive non-public personal information about you – from transactions we perform for you, forms you send us, other communications we have with you or your representatives, etc. This information could include your name, address, social insurance number, securities holdings and other financial information. We use this to administer your account, to better serve you and our clients' needs and for other lawful purposes relating to our services. Computershare may transfer personal information to other companies in or outside of Canada that provide data processing and storage or other support in order to facilitate the services it provides. We have prepared a Privacy Code to tell you more about our information practices, how your privacy is protected and how to contact our Chief Privacy Officer. It is available at our website, www.computershare.com, or by writing us at 100 University Avenue, Toronto, Ontario, M5J 2Y1.

Instructions

Who can use this form?

Issuer of an unmaturred RRSP

You can use this form to record a direct transfer, under paragraph 146(16)(a) of the *Income Tax Act* (Canada), of all of the property of the plan to the issuer of another RRSP having the same annuitant.

Note

You do not have to use this form. If, as the transferor, you provide the transferee with the information needed to correctly complete the transfer (for example, funds are from a locked-in plan or funds are from a spousal or common-law partner plan) you can use the method of documentation of your choice.

Issuer of a TFSA

You can use this form to record a transfer of the property in a TFSA to the issuer of another TFSA having the same account holder.

Who completes this form?

Section 1

The client asking for the transfer completes and signs Section 1. The form should then be sent to the issuer to which the property is to be transferred (the trustee). In place of a signature, a transferee who completes Section 1 for the client can attach a copy of a signed letter from him or her, asking for the direct transfer.

Section 2

The transferee completes and signs Section 2. The transferee then sends form to the existing trustee.

Section 3

The transferor completes and signs Section 3. The transferor keeps the original, and sends a copy to the transferee, along with the property being transferred.

Reporting requirements

A direct transfer under subsection 146(16) does not cause the amount transferred to become income of the annuitant. So, the transferor should not report the amount transferred on a T4RSP slip. Similarly, the transferee should not issue an official receipt, since the annuitant cannot deduct the amount transferred.

Delivery

This form must be submitted to Computershare Trust Company of Canada either by fax (604) 661-9401 or by mail to the following address:

Computershare Trust Company of Canada

Attn: Private Capital Solutions

2nd Floor, 510 Burrard St.

Vancouver, BC V6C 3B9

Email: PCSprocessing@computershare.com