



Transfer of TFSA on Relationship or Marriage Breakdown

Account Holder Information

Holder's Last Name _____ First Name _____ Social Insurance Number _____

Address Street City Province Postal Code Telephone Number

(Note: A transfer has to be made directly from the holder's TFSA to the TFSA of the holder's current or former spouse or common-law partner from whom the holder is living separate and apart. Attach a copy of the decree, order, judgment, or written separation agreement if unable to obtain the spouse or common-law partner's signature.)

Part A - Transfer From:

I am the holder of the TFSA _____
Individual TFSA Number and Name

Name of Issuer _____ Address of Issuer _____

Part B - Description of amount to be transferred:

- Please transfer all the property from the above mentioned TFSA
- Please transfer _____% of the property from the above noted TFSA
- Please transfer \$ _____, which is part of the property from the above noted TFSA

Part C - Transfer To:

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

Name of TFSA Issuer _____ Individual TFSA Number and Name _____

Address of TFSA Issuer _____

Name of Current or Former Spouse/Common-law Partner _____ Social Insurance Number _____

Date _____ Holder's Signature _____

Transferee

We agree to the request for a transfer of property.

When we receive the property, we will credit it to the TFSA of the current or former spouse or common-law partner identified above. The TFSA conforms, or will conform, to the specimen plan identified as:

Specimen Plan Number and Name

The plan is registered as a TFSA under the *Income Tax Act* or, if the plan is not registered, we will apply to have the plan registered as a TFSA.

Transferee's Name _____ Date _____

Transferee's Signature _____ Position or Office _____

LSM Authorized Signature _____ Date _____

Transferor

We transferred \$ _____ from the TFSA identified in Part A of Account Holder Information section to the transferee named in Part C of same section _____ (date of transfer).

The value of the property in the holder's TFSA just before the transfer was \$ _____.

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

Transferor's Name _____ Date _____

Authorized Person's Signature _____ Position _____