

Tax-Free Savings Account Direct Transfer Form



You can use this form to record a direct transfer. Please print, and check the boxes that apply to you.

Section I - Account Holder

Last name		First name and initials		Social insurance number 	
Address				Telephone	
Part A - Transfer from a TFSA <input type="checkbox"/> I am the applicant under the Tax-Free Saving's Account (TFSA). Individual plan number, and name _____					
Name of TFSA issuer			Address		
Part B - Description of amount to be transferred <input type="checkbox"/> Please transfer in CASH all of the property (approximately) \$ _____ <input type="checkbox"/> Please transfer in CASH part of the property in the amount of \$ _____					
Part C - Identifying the TFSA the funds are being transferred to <input type="checkbox"/> Please transfer the above-mentioned TFSA property to my TFSA. Individual plan number, and name _____					
Name of TFSA issuer HOME TRUST COMPANY			Address 145 King Street West Suite 2300, Toronto, Ontario M5H 1J8		
Date		Applicant's signature			

Section II - Transferee

We agree to the above request for a direct transfer of property. When we receive the property, we will credit it to the applicant or member under the plan or fund identified in Part C of Section I. If the plan or fund is a TFSA that conforms to a specimen plan or fund, it will conform with the specimen identified as: <div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> TFSA05710017 _____ Specimen plan </div> <div style="text-align: center;"> We will check the plan in Part C of Section I, and add or correct information as necessary. </div> </div>			
Transferee's name		Date	
Authorized person's signature		Position or office	

Section III - Transferor

We have transferred \$ _____ from the TFSA identified in Part A of Section I to the transferee named in Part C of Section I. I certify that the information given on this form is correct and complete.			
Transferor's name		Date	
Agent Account Number	_____	Agent Name	_____