

Non-Registered Joint Account Disclosure Form



Effective date: April 2023

☐ New ☐ Amendment ☐ Annual Reporting (CDIC Annual Reporting as at April 30th)

ACCOUNT NUMBER	ACCOUNT NAME	TOTAL AMOUNT OF DEPOSIT \$
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Beneficiary information

Beneficiary Name (add each individual beneficiary in the separate lines below)	Share of Trust Account (\$ or %)	Address	City	Province	Postal Code

SIGNATURE OF TRUSTEE X	DATE (MM/DD/YY)
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Note: An informal trust is an investment account registered in the name of an adult but is "in trust for" a beneficiary. This form is not to be used to designate beneficiary or successor holder/qualified beneficiary/successor annuitant on any registered plan.