Tax-Free Savings Account Direct Transfer Form

HOME TRUST

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

☐ 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

☐ Please transfer in CASH all of the property (approximately) $ _____

☐ Please transfer in CASH part of the property in the amount of $ _____

Part C - Identifying the TFSA the funds are being transferred to

☐ Please transfer the above-mentioned TFSA property to my TFSA.

Individual plan number, and name _____

Name of TFSA issuer	Address
HOME BANK	**145 King Street West Suite 2500, 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:

06410013
_____
Specimen plan

We will check the plan in Part C of Section I, and add or correct information as necessary.

Transferee's name	Date
HOME BANK	

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