

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			Address		
HOME TRUST COMPANY			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:	
05710017 _____ 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 TRUST COMPANY	
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
_____	_____