

REQUEST FOR CHANGE WITH REGARD TO THE HOLDER/ CO-HOLDER/BENEFICIARY

F51-230A-3



IMPORTANT – Only the original document will be processed if a participant signature is required.

Agency code Agency Agent code Agent S.U. Date of the request Y Y Y Y M M D D

or or

Account no. Holder's first and last name (in block letters) FundSERV Dealer Code Agent Code

A **CHANGE OF ADDRESS** → Effective date Y Y Y Y M M D D

No. Street Apt. PO Box

City Province Postal code

Email Telephone no.: Home Area code Office Area code

B **CHANGE OF BENEFICIARY/SUCCESSOR HOLDER** (Note: This section is not applicable in Quebec.)

New beneficiary

Last and first name	Relationship to the holder	%
1. <input type="text"/>	<input type="text"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>	<input type="text"/>
3. <input type="text"/>	<input type="text"/>	<input type="text"/>
4. <input type="text"/>	<input type="text"/>	<input type="text"/>

New successor holder (for a TFSA; must be the spouse or common-law partner)

Last and first name

Beneficiary under the age of legal majority (name a trustee)

I authorize the trustee to receive any payments on behalf of the beneficiary under the age of legal majority and to use the proceeds, at the trustee's discretion, solely for the support, maintenance, education and benefit of such beneficiary.

Last and first name	Name of the trustee	Relationship to the holder
<input type="text"/>	<input type="text"/>	<input type="text"/>

C **NAME CORRECTION**

I would like to correct the name of the holder co-holder, according to the following instructions:

Last name	First name
<input type="text"/>	<input type="text"/>

Due to: An error on the application Legal adoption (attach adoption papers) Reinstatement of the maiden name A legal name change (attach legal documents)

An error when data was entered in the system

D **CORRECTION TO THE DATE OF BIRTH**

I would like to correct the date of birth of the: holder co-holder subscriber, according to the following instructions:

Date of birth Y Y Y Y M M D D Due to: An error on the application (attach proof of date of birth) An error when the data was entered in the system

E **SPECIAL INSTRUCTIONS** **RESERVED FOR ADMINISTRATIVE USE**

Y Y Y Y M M D D

F **STATEMENT/SIGNATURES** → Signature date Y Y Y Y M M D D

I request that the changes indicated be made in accordance with the rights, conditions and stipulations of the Account.

X Holder (before change) **X** New holder

X Co-holder (before change) **X** Co-holder (after change) **X** Agent/witness