

Transfer-in Program

Our Transfer-in Program (T.I.P.) will help pay the transfer fees that your clients may incur when they transfer their accounts to B2B Bank Dealer Services (minimum of 25 accounts required).



B2B Bank Dealer Services will cover the following transfer costs for clients:

\$175.00 + applicable taxes	For the primary registered account and/or for each standalone non-registered account
\$50.00 + applicable taxes	For each linked registered and non-registered account
\$25.00 + applicable taxes	For each Tax-Free Savings Account (TFSA)

Plus:

In addition to the financial support, B2B Bank Dealer Services provides a fast and efficient transfer process of your clients' assets and accounts. Let us help you spend less time on administrative tasks so you can better serve your clients.

EXAMPLE:

Transferring multiple client accounts¹:

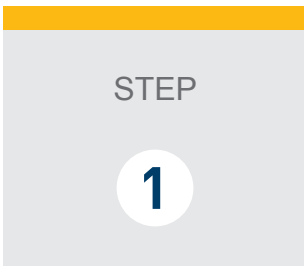
A client has multiple accounts at different financial institutions. He is looking to consolidate his accounts to a nominee platform to benefit from: a single application, single transfer form, consolidated statements, single RRIF payments and online access to his accounts.

Accounts to be transferred

Eligible transfer fees covered by B2B Bank Dealer Services

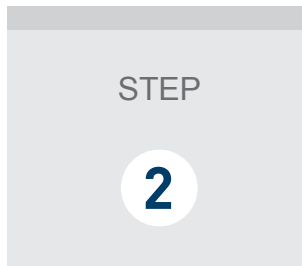
RRSP account with Financial Institution 1	\$175.00
Non-registered account with Financial Institution 2	\$50.00
TFSA 1 with Financial Institution 3	\$25.00
TFSA 2 with Financial Institution 3	\$25.00
Total eligible transfer out costs paid by B2B Bank Dealer Services	\$275.00

Get Started



Contact your Business Development Manager (BDM)

Your BDM will work with you to review your accounts to ensure you qualify for the program.



Move your accounts

Complete and send in the appropriate transfer and account application forms to our New Accounts & Transfers department.



Let us do the rest

Our dedicated team will track and monitor the entire transfer process and will notify you once it's complete.

Talk to your BDM today.

If you're interested in learning how B2B Bank Dealer Services can help you cover the transfer costs for your clients, talk to your BDM or call Client Services at 1-800-387-2087.

¹For illustrative purposes only. Account type and registration of account will determine the transfer eligibility amounts provided by B2B Bank Dealer Services. B2B Bank Dealer Services includes B2B Bank Financial Services Inc., B2B Bank Securities Services Inc., and B2B Bank Intermediary Services Inc. B2B Bank Financial Services Inc. and B2B Bank Securities Services Inc. are members of the Canadian Investment Regulatory Organization (CIRO) and members of the Canadian Investor Protection Fund (CIPF). B2B Bank Intermediary Services Inc. is operating in Quebec and regulated by the Autorité des marchés financiers (AMF). B2B Bank Dealer Services does not endorse or promote any investments products, programs and strategies. This document is intended for licensed financial advisors exclusively and is for information purposes only. B2B Bank is a trademark under license.