Import Data | Reset Form

B2B BANK
DEALER SERVICES

Internal Transfer Form

For BBS Deliveries Only, Use FINS #T080
Fax Completed Form To 416.979.0638

- This form is to be used for "In-Kind" or Cash transfers between accounts held at B2B Bank Financial Services Inc., B2B Bank Securities Services Inc., B2B Bank Intermediary Services Inc. and B2B Bank.
- Data entered on this form may be scanned and stored electronically.
- Please print neatly to ensure completeness, accuracy and machine-readability.

This form cannot be used to transfer:
- From a RIF, LIF or LRIF to an RSP. (Use Revenue Canada Form T2030)
- Between registered accounts with different trustees. (Use T2033 or TARI Form)
- Between accounts due to marriage breakdown or death.

A: Client Identification

Last Name	First Name	Initial(s)
Joint Account Holder Last Name (if applicable)	First Name	Initial(s)

Address

City	Province	Postal Code

Social Insurance Number	Residence Telephone ( )	Business Telephone ( )

B: Transfer From (Check one only):

☐ B2B Bank Financial Services Inc. (MFDA) ☐ B2B Bank Intermediary Services Inc. (AMF) ☐ B2B Bank Securities Services Inc. (IIROC) ☐ B2B Bank

Account Number

Account Type (Check one only):

☐ SPOUSAL RSP ☐ GROUP RSP ☐ RSP ☐ SPOUSAL RIF ☐ SPOUSAL GROUP RSP ☐ RLSP ☐ RLIF
☐ TFSA ☐ GROUP TFSA ☐ LOCKED-IN RSP/LIRA ☐ LIF ☐ RIF ☐ LRIF ☐ PRIF

☐ INVESTMENT (Check one of the following):

☐ INDIVIDUAL ☐ JOINT RIGHTS OF SURVIVORSHIP ☐ CORPORATE ☐ IN TRUST FOR
☐ ESTATE ☐ TENANTS IN COMMON (TIC) ☐ UNINCORPORATED ORGANIZATION ☐ FORMAL TRUST

C: Transfer To (Check one only):

☐ B2B Bank Financial Services Inc. (MFDA) ☐ B2B Bank Intermediary Services Inc. (AMF) ☐ B2B Bank Securities Services Inc. (IIROC) ☐ B2B Bank

Account Number

Account Type (Check one only):

☐ SPOUSAL RSP ☐ GROUP RSP ☐ RSP ☐ SPOUSAL RIF ☐ SPOUSAL GROUP RSP ☐ RLSP ☐ RLIF
☐ TFSA ☐ GROUP TFSA ☐ LOCKED-IN RSP/LIRA ☐ LIF ☐ RIF ☐ LRIF ☐ PRIF

☐ INVESTMENT (Check one of the following):

☐ INDIVIDUAL ☐ JOINT RIGHTS OF SURVIVORSHIP ☐ CORPORATE ☐ IN TRUST FOR
☐ ESTATE ☐ TENANTS IN COMMON (TIC) ☐ UNINCORPORATED ORGANIZATION ☐ FORMAL TRUST

D: Assets Transferred

Transfer: (check one box only for asset transfer instructions)

☐ All in kind (as is) ☐ Partial*; see list below or attached list ☐ All in cash* ☐ All assets*, but mixed in cash and in kind; see list below or attached list
☐ Check box if minimum payout amount should be made for transfers of income funds

*Please refer to statement in bold in Client Authorization section below.

	Investment Amount	Symbol and/or Certificate Number or Policy Number	Investment Description
☐ In Kind ☐ In Cash ☐ Shares/Units ☐ Dollars			
☐ In Kind ☐ In Cash ☐ Shares/Units ☐ Dollars			
☐ In Kind ☐ In Cash ☐ Shares/Units ☐ Dollars			
☐ In Kind ☐ In Cash ☐ Shares/Units ☐ Dollars			

E: Authorization

I hereby request and authorize the transfer of my account and/or investments as described above,

***WHERE I HAVE REQUESTED A TRANSFER IN CASH, I AUTHORIZE THE LIQUIDATION OF ALL OR PART OF MY INVESTMENTS AND AGREE TO PAY ANY APPLICABLE FEES, CHARGES OR ADJUSTMENTS. ANY MUTUAL FUND TRADE PLACED BY B2B BANK DEALER SERVICES WILL BE SUBJECT TO A $25 MUTUAL FUND TRADE FEE.**

X
AUTHORIZED CLIENT SIGNATURE (MANDATORY) DATE (mm/dd/yyyy)

X
AUTHORIZED CLIENT SIGNATURE (MANDATORY) DATE (mm/dd/yyyy)

ADVISOR NAME ADVISOR #

X
ADVISOR SIGNATURE DATE (mm/dd/yyyy)

DEALER NAME DEALER #

X
DEALER SIGNATURE DATE (mm/dd/yyyy)

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 is a trademark used under license.