Guide

Group Partners Member Change form

Dealer Services

Use this form to provide B2B Bank Dealer Services with important clerical and investment information about an applicant/client (i.e. employee) of the Group Plan Sponsor/Member (i.e. employer).

You may also use this form to provide initial investment instructions for payroll deductions as well as change or correct existing clerical and investment information affiliated with a B2B Bank Dealer Services Group Partners account.

How to complete the form:

Section	Required Fields	Tips
Header **Indicate the applicable Group number, Employer, Member Name, B2BBDS Account Number, SIN, and Province of Employment.**	All those that are applicable.	• For new accounts, indicate "New" in the group number and account number fields. • For existing accounts, indicate your B2B Bank Dealer Services account number(s). • Advisor information must be completed at the bottom of the page.
1. Termination/Retirement/Death	Optional. For use by Plan Sponsor (i.e. Employer) only. Complete all fields for any of the noted circumstances whereby plan sponsor contributions will cease.	The *Plan Administrator* on file at B2B Bank Dealer Services must sign and date.
2. Change of Beneficiary	Optional. For Group RSP/DPSP accounts only. Complete only if you would like to designate/change beneficiary.	
3. Change of Successor Holder and Beneficiary Designation	Optional For Group TFSA only. Complete only if you would like to designate/change successor holder.	
4. Address Change	Optional. Complete only if client/employee address or telephone number has changed.	A P.O. Box will not be accepted unless an actual street address is included.
5. Name Change	Optional. Complete only if client/employee name has changed.	1. *Reason for change* is required. If *Other*, please specify further. 2. A dealer signature guarantee stamp is required in addition to both the *Client's Signature prior to change and Client's new Signature.*
6. Investment Change	Optional. Complete only if client investment instructions are changing. Provides standing investment instructions for the payroll deductions contributed to the client/employee's Group Partners account by the plan sponsor/employer.	1. If no instructions are provided, all group contributions will default to Cash. 2. Ensure you indicate the full fund company code. 3. Only % amounts are allowed. 4. Instructions must add up to 100%. 5. Total authorized payroll deduction amount must be specified and dollar value of fund selection(s) must meet the minimum contribution amount(s) for each fund listed. 6. Employee must sign and date. For spousal accounts, the spouse must sign as client.

B2B BANK DEALER SERVICES

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7. Trades	Optional. Consult the Mutual Fund Trade Ticket Guide for further instructions on how to complete this section.	Client must sign whenever trade instructions are submitted.
Dealer/Financial Advisor Information (bottom of page)	Mandatory. For Dealer and/or Financial Advisor use only. Advisor must sign and date on each page where information/updates provided.	

For more information, please visit **b2bbank.com/dealerservices** or call Client Services at **1.800.387.2087.**