



Account number(s): \_\_\_\_\_

**Client Information**

Last Name		First Name		Initial
Residential Address (street # and name, apt. #) (not only a P.O. Box number)				
City	Province	Postal code	Country of residence	

**Advisor Information**

Last Name	First Name	Advisor/Agent Number
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**Dealer Information (optional)**

Dealer Name	Dealer Number
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**Power of Attorney Information**

Please provide details of two original pieces of identification (including one with photo) for each Power of Attorney authorized to transact on the account. The identification must be viewed and verified by the Guarantor signing below. Please refer to the Personal Identification Requirements Checklist on page 3 for a list of acceptable identification documents. For additional Power of Attorneys please attach additional forms. Please provide Original or Certified True Copy of the Power of Attorney Document.

**Power of Attorney #1**

Last Name		First Name		Initial
Residential Address (street # and name, apt. #) (not only a P.O. Box number)				Citizenship
City	Province	Postal code	Country of residence	Date of birth (mm/dd/yyyy)
Home phone number ( )	Cell phone ( )	Business phone ( )	Email	
Name of Employer			Employer telephone number ( )	
Address of Employer		City	Province	Postal code
Detailed Occupation (examples: actor, cook)		Status (examples: employed, unemployed, retired, student)		
Industry/Type of Business (examples: entertainment, food service)				

1. Full name as it appears on ID	Issuing authority	Date of issue (if applicable) (mm/dd/yyyy)
ID Type	ID number	ID Expiry date (mm/dd/yyyy)
ID Place of issue (jurisdiction)	Issuing Country	ID Verification date (mm/dd/yyyy)
2. Full name as it appears on ID	Issuing authority	Date of issue (if applicable) (mm/dd/yyyy)
ID Type	ID number	ID Expiry date (mm/dd/yyyy)
ID Place of issue (jurisdiction)	Issuing Country	ID Verification date (mm/dd/yyyy)



**Power of Attorney #1 (continued)**

Power of Attorney Signature \_\_\_\_\_

Date (mm/dd/yyyy) \_\_\_\_\_

**GUARANTOR'S CERTIFICATE OF SIGNATURE AND IDENTITY VERIFICATION (see list of acceptable Guarantors below)**

I hereby certify that I have personally met with the individual identified as Power of Attorney on this form, that I have seen the original identification records listed herein, and that I have witnessed the individual sign this form.

Guarantor Signature \_\_\_\_\_

Date (mm/dd/yyyy) \_\_\_\_\_

Print Name \_\_\_\_\_

Affix stamp or seal in the space below (not applicable if Guarantor is a lawyer)

**Acceptable Guarantors**

- Lawyer
- Notary Public
- Commissioner of Oaths
- Medallion "Stamp" program member
- Financial institution (bank/trust/securities dealer)
  - must affix "Signature Guarantee" stamp

**Power of Attorney #2**

Last Name			First Name			Initial	
Residential Address (street # and name, apt. #) (not only a P.O. Box number)						Citizenship	
City		Province	Postal code		Country of residence		Date of birth (mm/dd/yyyy)
Home phone number ( )	Cell phone ( )		Business phone ( )		Email		
Name of Employer					Employer telephone number ( )		
Address of Employer			City		Province		Postal code
Detailed Occupation (examples: actor, cook)			Status (examples: employed, unemployed, retired, student)				
Industry/Type of Business (examples: entertainment, food service)							
1. Full name as it appears on ID			Issuing authority			Date of issue (if applicable) (mm/dd/yyyy)	
ID Type			ID number			ID Expiry date (mm/dd/yyyy)	
ID Place of issue (jurisdiction)			Issuing Country			ID Verification date (mm/dd/yyyy)	
2. Full name as it appears on ID			Issuing authority			Date of issue (if applicable) (mm/dd/yyyy)	
ID Type			ID number			ID Expiry date (mm/dd/yyyy)	
ID Place of issue (jurisdiction)			Issuing Country			ID Verification date (mm/dd/yyyy)	



**Power of Attorney #2 (continued)**

Power of Attorney Signature

Date (mm/dd/yyyy)

**GUARANTOR'S CERTIFICATE OF SIGNATURE AND IDENTITY VERIFICATION (see list of acceptable Guarantors below)**

I hereby certify that I have personally met with the individual identified as Power of Attorney on this form, that I have seen the original identification records listed herein, and that I have witnessed the individual sign this form.

Guarantor Signature

Date (mm/dd/yyyy)

Affix stamp or seal in the space below (not applicable if Guarantor is a lawyer)

Print Name

**Acceptable Guarantors**

- Lawyer
- Notary Public
- Commissioner of Oaths
- Medallion "Stamp" program member
- Financial institution (bank/trust/securities dealer)
  - must affix "Signature Guarantee" stamp

**Personal Identification Requirements Checklist**

Details of **two** pieces of **valid** identification are required for each power of attorney for **personal** accounts. Each form must clearly indicate the Full name as provided on the ID, ID type, unique ID number, ID Place of issue (jurisdiction), Issuing authority, Issuing country, ID Verification date, Date of issue of the document (if applicable) and the ID Expiration date.

Details of the following are required:

- One piece of Type 1 Documentation and one piece of Type 2 Documentation
- OR**
- Two pieces of Type 1 Documentation

**Type 1 Documentation**

- Driver's Licence issued in Canada (DND 404 Driver's Licence is acceptable)
- Passport issued by Canadian or Foreign Government
- Certificate of Indian Status - issued by the Government of Canada
- Canadian Permanent Residence Card
- Quebec Health
- BC Services Card
- Identification Card - issued by Province (not available in Quebec)
- Citizenship Card - issued prior to February 2012
- NEXUS Card

[NOTE: Health Cards in Quebec must be offered by clients - they cannot be requested.]

**Type 2 Documentation**

- Certificate of Canadian Citizenship or Naturalization
- Provincial Health Card without photo issued by a province or territory — excluding Ontario, Prince Edward Island, Manitoba and Yukon
- Birth Certificate - issued in Canada only (by the Government, Church issued not accepted)
- Employee Identification Card issued by a recognized employer (bearing the individual's name and photograph)
- Old Age Security Card issued prior to 2008 (with cardholder's name and Social Insurance Number (SIN) embossed on card)
- Credit card or Bank Card issued by an institutional member of Payments Canada (bearing the individual's name and signature)
- Canadian Firearms Licence (bearing the individual's name, photograph, date of birth and expiry date)
- Canadian National Institute for the Blind Card (bearing the individual's signature and photograph)
- CANPASS Air membership card issued by Canada Border Services Agency (bearing the individual's name, date of birth, a client's ID number and photograph)
- Veteran Service Card (bearing the individual's name, service number and photograph)
- Canadian Forces Identification Card (bearing the name of the individual, photograph and expiry date)