



5. BANKING INFORMATION – Attach a Void Cheque

Change my banking information for the following:

ANNUAL ACCOUNT FEE PAC, PAC, RIF/LIF/LRIF/PRIF/RLIF (EFT), SWP (INVESTMENT & TFSA ACCOUNTS ONLY) (EFT), LOANS (B2B BANK INVESTMENT LOAN PAYMENT), EFFECTIVE DATE (mm/dd/yyyy)

CHANGE BANKING INFORMATION AT FUND COMPANY FOR CASH DISTRIBUTIONS (INDICATE FUND CODES):

BANK NAME, BANK TRANSIT NO., BANK ACCOUNT NO.

You authorize B2BBDS to share updates to this information with B2B Bank if your investment account is associated with a B2B Bank investment loan.

DEPOSITOR SIGNATURE, DATE (mm/dd/yyyy), DEPOSITOR SIGNATURE, DATE (mm/dd/yyyy)

NOTE: Bank account holder(s) must sign.

ADVISOR SIGNATURE, DATE (mm/dd/yyyy)

6. CLIENT NAME

PREVIOUS LAST NAME, FIRST NAME, PREVIOUS SIGNATURE

NEW LAST NAME, FIRST NAME, NEW SIGNATURE

NOTE: Client must sign both previous and new. Dealer must signature guarantee or attach a legal document with client's new name.

SIGNATURE GUARANTEE, DATE (mm/dd/yyyy), ADVISOR SIGNATURE, DATE (mm/dd/yyyy)

You authorize B2B Bank Dealer Services ("B2BBDS") to share updates to your personal information with B2B Bank if your investment account is associated with a B2B Bank Investment Loan. You authorize B2B Bank to update your B2B Bank accounts with your updated personal information that includes your legal name.

7. SUCCESSOR ANNUITANT AND BENEFICIARY DESIGNATION (optional) – applicable only to B2BBDS Registered Accounts, with the exception of TFSA Accounts

I hereby revoke any previous successor annuitant designation and any previous beneficiary designation with respect to this account.

A For RSPs, Locked-in RSPs/LIRAs and RLSPs: In the event of my death, I hereby designate the following person as my designated beneficiary entitled to receive my interest in this Account if living at my death. I reserve the right to revoke this designation.

NAME, RELATIONSHIP

ADDRESS

Caution: Any designation made in Section 8A or 8B above is subject to the following:

- For the purposes of this designation, spouse refers to a person recognized as your spouse or common-law partner for the purposes of the Income Tax Act (Canada).
The validity of a designation of a beneficiary or successor annuitant is subject to the applicable pension legislation and the laws of the jurisdiction where you reside, if any, permitting designations to be made otherwise than by way of a will.
In the absence of a designated beneficiary or successor annuitant, the proceeds of your Account will be paid to your estate.
Notwithstanding any designation by you to the contrary, your spouse (within the meaning of the applicable pension legislation) may automatically be entitled to the benefits under one or more of your Accounts including your Locked-in RSP/LIRA, RLSP, LIF, RLIF, PRIF or LRIF.
Your designation above will not be revoked or changed automatically by any future marriage or divorce. Should you wish to change your designated beneficiary or successor annuitant, you will have to do so by means of a new designation.
Any designation made above shall apply to this Account only. If you have other accounts for which you wish to designate a beneficiary or successor annuitant you must complete a separate designation for each of these accounts.

NOTE: Client must sign.

CLIENT SIGNATURE, DATE (mm/dd/yyyy), ADVISOR SIGNATURE, DATE (mm/dd/yyyy)

B For RIFs, LIFs, LRIFs, RLIFs and PRIFs: In the event of my death (pick one or both):

- I hereby elect that my spouse, if living and remaining my spouse at the time of my death shall continue to receive payments as successor annuitant under my Account and to the extent possible and permitted by law shall acquire all rights I have as holder thereof. I reserve the right to revoke this designation; or

SPOUSE'S NAME

SPOUSE'S SOCIAL INSURANCE NUMBER

- If: (a) the successor annuitant named above, if any, predeceases me or is not my spouse at the time of my death; or (b) I have not elected any successor annuitant under my Account; then I hereby designate the following person as my designated beneficiary entitled to receive my interest in this Account if living at my death. I reserve the right to revoke this designation.

NAME, RELATIONSHIP

ADDRESS

8. SUCCESSOR HOLDER AND BENEFICIARY DESIGNATION (optional) – applicable only for TFSA Accounts

I hereby revoke any previous successor holder designation and any previous beneficiary designation with respect to this B2BBDS Tax-free Savings Account.

A In the event of my death I hereby designate my spouse\*, if living at my death, as the successor holder of this B2BBDS Tax-free Savings Account to acquire all rights I have as the holder thereof. I reserve the right to revoke this designation.

SPOUSE'S NAME, SPOUSE'S SOCIAL INSURANCE NUMBER

\* Spouse refers to a person recognized as your spouse or common-law partner for the purposes of the Income Tax Act (Canada). The person you designate as a successor holder must be your spouse at the time of your death.

B In the event that the successor holder designated by me in A predeceases me or where I have not named a successor holder in A, I hereby designate the following person as my designated beneficiary entitled to receive the proceeds of this B2BBDS Tax-free Savings Account in the event of my death. I reserve the right to revoke this designation.

NAME, RELATIONSHIP

ADDRESS

In the absence of a designated beneficiary or successor holder, the proceeds of this B2BBDS Tax-free Savings Account will be paid to your Estate.

Caution: 1. The validity of a designation of a beneficiary or successor holder is subject to the laws of the jurisdiction where you reside permitting designation made otherwise than by way of a will.

- Your designation of a successor holder and/or beneficiary to this B2BBDS Tax-free Savings Account by means of this designation form will not be revoked or changed automatically by any future marriage or divorce. Should you wish to change your successor holder or beneficiary in the event of a future marriage or divorce, you will have to do so by means of a new designation.
This designation of successor holder and/or beneficiary will apply to this B2BBDS Tax-free Savings Account only. If you have other tax-free savings accounts with B2B Trustco as trustee for which you want a successor holder or beneficiary to be designated, you must complete a separate designation for each of these accounts.

NOTE: Client must sign.

CLIENT SIGNATURE, DATE (mm/dd/yyyy), ADVISOR SIGNATURE, DATE (mm/dd/yyyy)