



# Group Partners Member Change Form

Group Number: \_\_\_\_\_ Plan Sponsor (Employer): \_\_\_\_\_  
 Member Name: \_\_\_\_\_ B2BBDs Account Number: \_\_\_\_\_  
 Social Insurance Number: \_\_\_\_\_ Province of Employment: \_\_\_\_\_

In this form "B2B Bank Dealer Services" means B2B Bank Financial Services Inc., B2B Bank Securities Services Inc. or B2B Bank Intermediary Services Inc., as the case may be, which the identified B2B Bank Dealer Services ("B2BBDs") Account Number is related to.

## 1. TERMINATION / RETIREMENT / DEATH

Effective date of termination: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
 Month Day Year

### The reason for termination:

- Termination of employment       Retirement  
 Death (Please provide copy of death certificate or funeral director's statement)  
 Other, explain \_\_\_\_\_

Have all contributions been remitted in respect of plan membership to date of termination/retirement/death?

- Yes     No

If no, outstanding contributions will be remitted on (Date) \_\_\_\_\_

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

Signature **X** \_\_\_\_\_ Date(mm/dd/yyyy) \_\_\_\_\_

### Temporary suspension of contributions

- Temporary layoff From \_\_\_\_\_ to \_\_\_\_\_  
 Temporary leave of absence From \_\_\_\_\_ to \_\_\_\_\_

Please direct all future correspondence directly to the member at his/her home address, as follows:

Name \_\_\_\_\_

Address \_\_\_\_\_

## 2. CHANGE OF BENEFICIARY – Beneficiary designations are subject to the laws of each jurisdiction. (Group RSP/DPSP accounts only).

### Designation of Revocable Beneficiary

I hereby revoke any previous beneficiary designation applicable to my interest in the above mentioned Plan and, pursuant to the provisions of the Plan, designate the person named below as my beneficiary. I reserve the right to revoke this designation.

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

Client Signature **X** \_\_\_\_\_ Date(mm/dd/yyyy) \_\_\_\_\_

**To Appoint a trustee for a named Beneficiary under 18 years of age**  
 I hereby appoint the person below as trustee for any beneficiary under age 18, or any beneficiary who may not be able to get a valid discharge for payment (unless I have appointed a trustee in a separate trust agreement).

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

Client Signature **X** \_\_\_\_\_ Date \_\_\_\_\_  
 (mm/dd/yyyy)

## 3. CHANGE OF SUCCESSOR HOLDER AND BENEFICIARY DESIGNATION (Group TFSA accounts only).

I hereby revoke any previous successor holder designation and any previous beneficiary designation with respect to this B2B Bank Dealer Services 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 B2B Bank Dealer Services 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 \_\_\_\_\_

**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 B2B Bank Dealer Services Tax-free Savings Account in the event of my death. I reserve the right to revoke this designation.

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

\*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 your successor holder must be your spouse at the time of your death.

In the absence of a designated beneficiary or a successor holder, the proceeds of this B2B Bank Dealer Services Tax-free Savings Account will be paid to your Estate.

- Caution:**
- 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 B2B Bank Dealer Services 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 B2B Bank Dealer Services 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.

Client Signature **X** \_\_\_\_\_ Date (mm/dd/yyyy) \_\_\_\_\_

## 4. CLIENT ADDRESS

**NOTE:** 2 signatures are required - either Client and Advisor/Authorized Dealer **OR** Advisor and Authorized Dealer

ADDRESS \_\_\_\_\_  
 CITY \_\_\_\_\_ PROVINCE \_\_\_\_\_ POSTAL CODE \_\_\_\_\_ COUNTRY \_\_\_\_\_ RESIDENCE TELEPHONE NUMBER \_\_\_\_\_

CLIENT SIGNATURE \_\_\_\_\_ DATE (mm/dd/yyyy) \_\_\_\_\_

ADVISOR SIGNATURE \_\_\_\_\_ DATE (mm/dd/yyyy) \_\_\_\_\_

CLIENT SIGNATURE \_\_\_\_\_ DATE (mm/dd/yyyy) \_\_\_\_\_

AUTHORIZED DEALER SIGNATURE \_\_\_\_\_ DATE (mm/dd/yyyy) \_\_\_\_\_  
 (i.e. Branch Manager)

**Authorized Dealer:** By signing this form, you attest that client authorization for the address change has been obtained.

**OVER →**

**5. NAME CHANGE**

Please adjust your records to change the above mentioned member's name from:

\_\_\_\_\_ to \_\_\_\_\_

Reason for change:

- Marriage (please attach a copy of the marriage certificate)
- Return to maiden name (please attach a copy of the name change certificate, divorce document or separation agreement)
- Legally changed (please attach a copy of the name change certificate)
- Other, specify \_\_\_\_\_

Signature

**X** \_\_\_\_\_  
Client's Signature prior to change

**X** \_\_\_\_\_  
Client's new Signature

**6. INVESTMENT CHANGE**

I hereby elect to have future contributions allocated as shown below:

FUND NUMBER	ALLOCATION	FUND NUMBER	ALLOCATION
_____	_____ %	_____	_____ %
_____	_____ %	_____	_____ %
_____	_____ %	_____	_____ %
_____	_____ %	_____	_____ %

I authorize my employer to deduct \$ \_\_\_\_\_ from my payroll each pay period (minimum contribution amounts are subject to the individual Fund prospectus).

Client Signature **X** \_\_\_\_\_ Date(mm/dd/yyyy) \_\_\_\_\_ Employee Signature **X** \_\_\_\_\_ Date(mm/dd/yyyy) \_\_\_\_\_

**7. TRADES – See the B2B Bank Dealer Services fundamentals guide on Advisor Access for mutual fund trading tips.**

Please refer below for the Amount Type Legend.

SELL						BUY						
SWITCH	CONVERSION	Fund Code	AMOUNT TYPE	Amount	GROSS/NET	Fund Code	AMOUNT TYPE	Amount	SALES CHARGE	FUND OPTION	COMMISSION REBATE	WIRE ORDER # DEALER USE ONLY
S	C				G						\$	
W	V				N						%	
FUND NAME (optional)						FUND NAME (optional)						
S	C				G						\$	
W	V				N						%	
FUND NAME (optional)						FUND NAME (optional)						
S	C				G						\$	
W	V				N						%	
FUND NAME (optional)						FUND NAME (optional)						
S	C				G						\$	
W	V				N						%	
FUND NAME (optional)						FUND NAME (optional)						

Client Signature **X** \_\_\_\_\_ Date (mm/dd/yyyy) \_\_\_\_\_

**AMOUNT TYPE LEGEND – \*SPECIFY AN AMOUNT**

Verify if the "CSS Amount Type" is supported by the fund management company before placing trades.

**ALL FUNDS**

- A** – ALL
- D** – Dollars
- P** – Percentage of shares
- S** – Shares

**CSS MUTUAL FUNDS ONLY**

- F** – All shares/units not subject to DSC (also known as M + T free)
- M** – Matured shares/units ONLY
- T** – Shares/units allowed to be redeemed not subject to DSC, and excluding matured shares/units

**CSS LABOUR SPONSORED INVESTMENT FUNDS (LSIFs)**

- \*B** – contributor disabled or terminally ill
- C** – held longer than 5 - 8 years
- J** – death
- L** – free of DSC

**THIS SECTION MUST BE COMPLETED BY THE ADVISOR**

<b>For Advisor / Dealer Use Only</b>	
Dealer Name _____	Advisor Name _____
Dealer / Advisor Code _____	<b>X</b> _____
Date (mm/dd/yyyy) _____	Advisor Signature _____

B2B Bank Dealer Services includes B2B Bank Financial Services Inc. (an MFDA member), B2B Bank Securities Services Inc. (an IIROC member, Member — Canadian Investor Protection Fund) and B2B Bank Intermediary Services Inc. (an AMF-regulated dealer operating in Quebec). B2B Bank is a trademark used under license.