Import Data | Reset Form

B2B BANK DEALER SERVICES

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.

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.

PRINT LETTER SIZE

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 ☐ Shares/Units	☐ In Cash ☐ Dollars			
☐ In Kind ☐ Shares/Units	☐ In Cash ☐ Dollars			
☐ In Kind ☐ Shares/Units	☐ In Cash ☐ Dollars			
☐ In Kind ☐ Shares/Units	☐ In Cash ☐ 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.**

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)