



# Power of Attorney Identification Form

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) \_\_\_\_\_

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

## 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
- Passport issued by Canadian or Foreign Government
- Certificate of Indian Status - issued by the Government of Canada
- Canadian Permanent Residence Card
- Quebec Health Card (with photo ID and expiry date)
- Identification Card - issued by Province (not available in Quebec)
- Citizenship Card - issued prior to February 2012

**[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 (that has no photo and/or expiration date)
- Birth Certificate - issued in Canada only (by the Government, Church issue not accepted)
- Social Insurance Card - issued by the Government of Canada
- Old Age Security Card issued prior to 2008 (contains the SIN of the individual)
- Major Credit Card (bearing the name of the individual and the individual's signature)
- College/University Student ID Card (bearing the individual's name, signature and photograph)
- Firearms Licence - issued federally with photo ID
- NEXUS Card (bearing the individual's name, photograph and passport number)
- CNIB Card
- Canadian Forces Identification Card (bearing the name of the individual, photograph and expiry date)

**[NOTE: Health Cards are not acceptable identification for Manitoba, Ontario, Prince Edward Island or Nova Scotia.]**