

Documentation Checklist

Remember to include the following documentation:

☐ Transfer Authorization for Non-Registered Investments, completed by you and any co-applicants	J
☐ Letter of Direction for Cash Distributions , to continue receiving your mutual fund distributions in cash if applicable.	ıl
☐ Supplemental Client Information form, completed by you and any coapplicants	

If you have any questions – or need help completing these forms, please contact a B2B Bank Client Service Representative at 1.800.387.2087

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