



Transfer from a Tax-Free Savings Account (TFSA) to another TFSA on breakdown of marriage or common-law partnership

- Use this form to transfer all or part of your TFSA funds to your current or former spouse or common-law partner, where required, in the division of property related to the breakdown of your marriage or common-law partnership.
- Simply complete Section 1 and mail the form to us at the address shown.

6807 Railway Street SE, Unit 120
Calgary, Alberta T2H 2V6

Section 1 - Account Holder

Last Name		First Name and Initial(s)		Social Insurance Number	
Street Address				City/Town	
Province	Postal Code	Telephone Number	Email		

Part A – Details of the TFSA you are transferring funds from

I am the account holder of the Tax-Free Savings Account (TFSA) _____
Individual Plan Name and Number

Name of Financial Institution (where TFSA is held)	Address of Financial Institution (where TFSA is held)
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Part B – Description of amount to be transferred IN CASH ONLY. Please transfer the TFSA funds as indicated below.

The entire balance of the account
A portion of the balance, in the amount of \$ _____
_____ % of the balance from the TFSA

I have requested a transfer from the TFSA listed in Part A, with transfer instructions indicated above. I agree to pay any applicable fees, charges or adjustments. _____
Initials

Part C – Details of the TFSA you are transferring funds to

Please transfer the TFSA funds noted above to my current or former spouse or common-law partner to the Financial Institution, listed below.

Name of Financial Institution (where TFSA will be sent)		Plan Name and Number	
Address of Financial Institution (where TFSA will be sent)			
Name of current or former spouse or common-law partner		Social Insurance Number of current or former spouse or common-law partner	
Address of current or former spouse or common-law partner			
Date		Account Holder's Signature	
		Or see attached letter/order*	

Section 2 – Receiving Financial Institution

We agree to the request above for a transfer of the funds. When we receive the funds, we will credit it to the account identified in Part C of Section 1.
The TFSA will conform with specimen plan number _____. We will check the plan in Part C of Section 1 and add or correct the information as necessary.

Name of Receiving Financial Institution	Authorized Person's Signature	Date	Position in Office
Current or Former Spouse's or Common-Law Partner's Signature		Date	
		Or see attached letter/order*	

The plan is registered under the Income Tax Act (Canada) or, if the plan is not registered, we will apply for such registration.

Section 3 – Transferring Financial Institution

We have transferred \$ _____ from the TFSA identified in Part A of Section 1 to the Receiving Financial Institution named in Part C of Section 1 and certify the information given is correct and complete.

Name of Transferring Financial Institution	Authorized Person's Signature	Telephone Number
Date	Position in Office	

Section 4 – Receiving Institution Confirmation of Receipt

We have received \$ _____ which we will credit to the account of _____
Current or Former Spouse's or Common-Law Partner's Name

Name of Receiving Financial Institution	Authorized Person's Signature	Telephone Number
Date	Position in Office	

*Please attach a letter or copy of the decree, order, judgement or written separation agreement only if you are unable to obtain the signature from the spouse of common-law partner.