

TRANSFER FROM A TAX-FREE SAVINGS ACCOUNT (TFSA) TO ANOTHER TFSA ON BREAKDOWN OF MARRIAGE OR COMMON-LAW PARTNERSHIP

Transfers documented in this form must be made directly from the Owner's TFSA to the TFSA of the Owner's spouse. Empire Life reserves the right to request supporting documentation in addition to the Owner's signature.

Throughout this form "Spouse" means Spouse or Common-law partner (or former Spouse or Common-law partner) as defined in the Income Tax Act (Canada).

1. TFSA Owner Identification			
Owner name (first, middle, last)			
Address (number, street name)		City	Province Postal code
Social Insurance Number		Personal telephone	Business telephone
Name of TFSA issuer			Account/policy number
Address		City	Province Postal code
2. Owner Direction to Relinquishing Institution			
I hereby request the transfer, IN CASH , from the account/policy number noted in section 1 to my spouse's policy/application number noted below. Select one of the following: <input type="radio"/> all of the value OR <input type="radio"/> a partial surrender as specified below:			
Fund name or investment description		FundSERV code	% of total investment or \$ amount
Destination of Transfer			
The Empire Life Insurance Company 259 King Street East, Kingston ON K7L 3A8 Telephone: 1 800 561-1268 Fax: 1 866 762-6163			
Receiving spouse's name (first, middle, last)			
Receiving spouse's policy/application number		Social Insurance Number	
I authorize the surrender of all or part of my investment as indicated above and agree to the value being reduced by any applicable fees, charges or adjustments.			
Signature of Owner X			Date (dd/mmm/yy)
3. Receiving Institution			
We agree to the request for transfer of property. When property is received, it will be credited to the TFSA of the Spouse identified in section 2. The TFSA conforms, or will conform to the TFSA identified. The arrangement is registered under the <i>Income Tax Act</i> as a TFSA, or, if the arrangement is not registered as a TFSA, Empire Life will apply for such registration pursuant to the requirements under the applicable section(s) of the <i>Income Tax Act</i> , which govern(s) TFSA registrations.			
Signature of authorized person X		Position or office	Date (dd/mmm/yy)
Receiving Spouse			
By signing below, the receiving spouse verifies that the request for transfer is true to the Order of Judgment and understands that Empire Life reserves the right to request a copy of the Order if the spouse's signature cannot be obtained.			
Signature of Receiving Spouse X			Date (dd/mmm/yy)
4. For Use by Relinquishing Institution Only			
Amount transferred \$		Market value of the TFSA before the transfer \$	Date of transfer (dd/mmm/yy)
Signature of authorized person X		Position or office	Date (dd/mmm/yy)

SEE REVERSE FOR INSTRUCTIONS



INSTRUCTIONS FOR COMPLETION

This form is to be used for transfers from one TFSA to another TFSA on breakdown of marriage or common-law partnership.

Who completes this form and why?

This form is for use by a TFSA Owner, the Relinquishing Institution, the TFSA Owner's spouse and the Receiving Institution, to request the transfer of an amount from the Owner's TFSA to the TFSA of the Owner's Spouse where:

- those individuals were Spouses;
- the transfer is required as part of the division of property in the settlement of the individuals' rights with respect to the breakdown of marriage or common-law partnership; and
- the transfer is in accordance with the terms of a valid Order.

If an amount will be transferred from your TFSA:

Complete and sign the form and submit it to the Relinquishing Institution. The Receiving Institution (the financial institution of your Spouse) may complete the Spouse's TFSA information in Section 2 if not known.

If an amount will be transferred to your TFSA:

Provide the Relinquishing Issuer, through your financial institution, with your written instructions, including a copy of the Order if requested (you can include a copy of the decree, order, judgement or agreement to the Transferor sealed in an envelope).

Are there any tax implications?

No amount transferred in accordance with this form is reported as a TFSA withdrawal or a contribution to a TFSA for income tax purposes, nor does such a transfer alter the permitted TFSA contributions of either individual. A tax receipt for income tax purposes will not be issued.