

Client Information Change Form

Last Updated: December 2024



PART 1: ACCOUNT INFORMATION

Plan Type

RRSP/LRSP/LIRA RRIF/LIF/LRIF TFSA RLSP RLIF RDSP

Account # _____

First Name _____

Last Name _____

PART 2: CLIENT ADDRESS

Address _____

Home Phone _____

Business Phone _____

City _____

Province _____

Postal Code _____

Cell Phone _____

Email _____

PART 3: AGENT INFORMATION

I hereby appoint the following agent named within and direct and authorize Community Trust Company ("CTC") to release and provide all or any information concerning my registered account to my agent. I further authorize CTC to accept instructions from my agent, signed by me, with respect to the acquisition or disposition of any investment held for my Plan and authorize CTC to make all required deposits and withdrawals from the plan for the purpose of carrying out such instructions.

Agent Name _____

Company _____

Email _____

Telephone Number _____

License/Agent Number _____

Remove the Agent currently on file for the account.

PART 4: RIF/LIF PAYMENT

Payment Frequency: Monthly Quarterly Semi-annually Annually

Payment Amount: Minimum (per ITA) Specified Amount \$ _____ (cannot exceed LIF Maximum amount) LIF Maximum

Payment Date: _____
(MM/DD)

Payment Instructions: Direct Deposit to my bank account _____
Bank _____ Transit Number _____ Account Number (attach "VOID" cheque) _____

PART 5: BANKING INFORMATION

Bank _____

Transit Number _____

Account Number (attach "VOID" cheque) _____

PART 6: SIGNATURE

I hereby authorize CTC to make the above stated changes.

I consent to having CTC use the email address that I have supplied herein to communicate with me regarding the status and on-going administration of my Plan.

I expressly request that this document and any related instruments be drawn up in the English language. Je demande expressément que la présente formule et tous les documents qui s'y rapportent soient rédigés en anglais.

Client Signature _____

Date _____

PRIVACY

Privacy Statement

Community Trust respects your privacy and is committed to protecting your personal information. Our Privacy Policy (communitytrust.com/privacy-policy/) contains information about our safeguards and practices, including how and why we may collect, use, and disclose your personal information. If you have any questions or concerns about the contents of our Privacy Policy, or would like to speak to a member of our team about your personal information rights, please email our Privacy Office at privacy@communitytrust.com.

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