Trust Account Beneficiary Form

! Please note, this form is only to be used for **non-registered** accounts, It cannot be used to designate beneficiary(ies) on any registered plans.

Instructions:

1. Complete this form if you are a trustee and can confirm that the deposits in this account are held in trust.
2. If you have multiple deposit accounts that are held in trust, please submit a separate form for each account.

ACCOUNT NUMBER	ACCOUNT NAME	TOTAL AMOUNT OF DEPOSIT $

Trustee information

Full Name	Address	City	Province	Postal Code

Beneficiary information

Full Name	Share of Trust Account ($ or %)	Address	City	Province	Postal Code

SIGNATURE OF TRUSTEE	DATE (MM/DD/YY)
X	

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