



Transaction Request Form

Client Name: _____

Joint Owner (if applicable): _____

Email: _____

Account Number: _____

Please Check (✓)

- RRSP
- Non-Registered
- RRIF
- RESP
- TFSA
- LIRA
- LIF

Purchase Instructions

Source of Funds: Cheque Bill Payment Retirement Gratuity

Fund Code	Fund Name	Amount (\$/%)
Total:		

Redemption Instructions

Send Proceeds via: Cheque EFT Withdrawal (Please specify the bank account if there are multiple) Redeem 100% of Account

Fund Code	Fund Name	Amount (\$/%)	Gross	Net
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
Total:				

Transfer/Switch Instructions

FROM A/C#		TO A/C#	
Fund Code / Fund Name	Amount (\$/%/Units)	Fund Code / Fund Name	Amount (\$/%/Units)

- Please note that conversion of units of a mutual fund with a deferred sales charge into units of the same mutual fund carrying 0% front-end load may 1) have tax implications for trades in non-registered plans; and 2) result in increased trailer fees to the dealer. Please read the applicable fund prospectus for additional information.
- A DSC (Deferred Sales Charge) or a LSC (Low Sales Charge) of approximately \$ _____ will be charged by redeeming the fund(s) specified above.
- A withdrawal from a registered plan (i.e. RRSP, RRIF) may be subject to withholding tax. The amount you have requested to redeem from your RRSP/RRIF plan as specified above will be subject to approximately \$ _____ in withholding taxes.

Special Instructions

Authorization

_____ _____
 Account Holder's Signature Name (Please Print) Date

_____ _____
 Joint Account Holder's Signature Name (Please Print) Date
(if applicable)

For a joint bank account, provide all signatures required on cheques issued against the bank account. If not an existing member of Educators Financial Group, please ensure a completed application form is provided.

Compliance Approval

