



One focus, many solutions.

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

Fund Code	Fund Name	Amount (\$/%)

Redemption Instructions

Send Proceeds via: EFT Withdrawal Cheque

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"/>

Transfer/Switch Instructions

FROM		TO	
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)

Y|Y|Y|Y|M|M|D|D

Date

Joint Account Holder's Signature
(if applicable)

Name (Please Print)

Y|Y|Y|Y|M|M|D|D

Date

Compliance Approval

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.



PLANNING



INVESTING



LENDING