Transaction Request Form

Please Check (✓)

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

Client Name: _____

Joint Owner *(if applicable)*: _____

Email: _____

Account Number: _____

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
			☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐
	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

_____ _____ Y Y Y Y M M D D

Account Holder's Signature | Name *(Please Print)* | Date

_____ _____ Y Y Y Y M M D D

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

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

(10/19)

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