

Tax-Free Savings Account Successor Holder/Beneficiary Designation Form Guidelines

Please read prior to completing your designation

To ensure this form meets requirements, please use the following as a guide when completing the form.

1. Insert full legal name of the Account Holder, which should be the same name under which the TFSA was opened.
2. Insert the TFSA account number. Your account number would have been included in your New Account package, welcome letter, or if you gave us your email address, instructions would have been included on how to access your account via our online trading. If you are an existing RBC Royal Bank client and you have provided RBC Direct Investing with your client card number, you can access your new account by signing into Online Banking using your existing password and client card number and click “**View my home page**” under the Investments heading on the Account Balances page.
3. **Part 1** – if you designate your spouse or common-law partner please insert his/her full legal name. Also include his/her Social Insurance Number, if available.
4. **Part 2** – You may designate a *sole beneficiary, multiple beneficiaries or contingent beneficiary(ies)* in this section (**NOTE: do not include your spouse or common-law partner’s name in this section if you have already designated him/her in Part 1**). Please ensure the full legal names of all designated beneficiaries are included in this section, including relationship** and percentage allocation for each beneficiary designated.
5. Include Province or Territory where the form is executed.
6. Date and sign the form.
7. Do not delete or modify any sections of the form. This is a legal document.
8. Should you make any errors, all changes must be initialed. Or, if you prefer, you may print a new form and start again.

***Acceptable Designations:** Only persons (e.g. Trusts, Corporations, children are **not** acceptable)

**** Acceptable relationships:** Son, Daughter, Spouse, Friend, etc.