



TAX FREE SAVINGS ACCOUNT
Third Party Contribution Certification Form

TFSA Account Number: _____

A. THIRD PARTY CONTRIBUTION CERTIFICATION

Use this form where a contribution is made to a new or existing TFSA account by someone other than the TFSA account owner. It must be completed and submitted with the contribution.

The Canada Revenue Agency ("CRA") requires the TFSA account owner to make contributions into their TFSA account. If someone other than the TFSA account owner is making the contribution, the TFSA account owner must certify that they are receiving the contribution from the third party as a gift or from their employer, and the TFSA account owner is the beneficial owner of the contribution.

IMPORTANT NOTE: Should the CRA determine that the third party contribution does not satisfy CRA requirements, it may result in negative tax consequences to the TFSA account owner and the third party, including deregistration of the TFSA account. The TFSA account owner and the third party are responsible for ensuring that all CRA TFSA requirements are satisfied.

1. I certify that I have directed the contribution from the third party to be contributed directly into my TFSA account, and it was received as:

A Gift:

a) Name of third party: _____

b) Address: _____

c) Date of birth: _____

d) If an entity or company provide registration / incorporation number: _____

Nature of business: _____

d) Nature of relationship with the third party: _____

OR

A Contribution by Employer on Behalf of an Employee:

a) Employer's name: _____

b) Nature of business: _____

2. I certify that I am the beneficial owner of the contribution, and no other person or entity has or will have the use or access to the TFSA policy account value.

TFSA Account Owner Signature

Date (dd/mm/yyyy)

Print Name of TFSA Account Owner