

TAX FREE SAVINGS ACCOUNT
Third Party Contribution Certification Form

TFSA Contract Number: _____

A. THIRD PARTY CONTRIBUTION CERTIFICATION

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

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

e) 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 contract value.

TFSA Contract Owner Signature _____ Date (dd/mm/yyyy) _____

Print Name of TFSA Owner _____