## BMO (A) Wealth Management

**BMO InvestorLine** 

Welcome to BMO InvestorLine	TAX-FREE SAVINGS ACCOUNT (TFSA) SUCCESSOR ACCOUNT HOLDER APPOINTMENT AND/OR BENEFICIARY DESIGNATION FORM
Account Holder's	
Account	
$\cdot$ A TFSA account holder may appoint his/her s	pouse or common-law partner as the successor account holder, or may designate a beneficiary (or beneficiaries), or may do both.
	er or beneficiary may be made for all provinces and territories excluding Quebec.
partner will acquire all of the rights under the	pouse or common-law partner as successor account holder, then upon the death of the account holder, the spouse or common-law PTFSA and the TFSA will continue in the spouse or common-law partner's name. The appointment will not, however, take effect if the FSA account holder's spouse or common-law partner at the time of death or if he/she has died before the account holder.
<ul> <li>If the TFSA account holder does not appoint a the TFSA will be paid out to the beneficiary (</li> </ul>	successor account holder and designates a beneficiary (or beneficiaries), then upon the death of the account holder the proceeds of or beneficiaries), and the TFSA will be closed.
	her spouse or common-law partner as successor account holder and designates a beneficiary (or beneficiaries), then the appointment . The spouse or common-law partner who was appointed will become the successor account holder, even though a beneficiary was also
paid to the legal representative(s) or estate of	successor account holder nor designates a beneficiary, then upon the death of the account holder the proceeds of the TFSA will be of the account holder. The proceeds of the TFSA will also be paid to the legal representative(s) or estate if, at the time of death, the not effective (because the person who was appointed is no longer the TFSA account holder's spouse or common-law partner or has lied.
Minor Child: If a designated beneficiary is a r applicable provincial or territorial law to received	ninor child at the time of the account holder's death, there must be a trustee and/or guardian of property validly appointed under ve the proceeds of the TFSA.
A APPOINTMENT OF SPOUSE OR CO	DMMON-LAW PARTNER AS SUCCESSOR ACCOUNT HOLDER*
appoint my spouse or common-law partner (na partner will acquire all of my rights as the accound have the meaning given to them under the Inco I understand that this appointment will not be me). I understand that I may revoke or change	pointment of successor account holder that I have made for this TFSA (whether on the TFSA Application Form or separately in writing), and med below) to be the successor account holder of the TFSA upon my death. As the successor account holder, my spouse or common-law unt holder of the TFSA upon my death, and the TFSA will continue in his/her name. (The words "spouse" and "common-law partner" here ome Tax Act.) effective if the person named below is no longer my spouse or common-law partner at the time of my death (or if he/she dies before this appointment at any time, and that it is my responsibility to make a new appointment if my marriage or common-law partnership before me) and I wish to appoint another person.
Spouse or Common-Law Partner's	
Last Name	First     Name
SIN	
TFSA Account Holder Signature	Date Y Y M M D D
*This appointment cannot be made in Quebec	because of the differences under Quebec Law.
<b>B</b> DESIGNATE BENEFICIARY For all	provinces and territories except Quebec*
	ring person(s) as beneficiary (beneficiaries) to receive the proceeds of the TFSA upon my death, subject to the information outlined in ted dies before me, then that beneficiary's percentage entitlement will be shared among any other beneficiaries I have designated who ntitlement.
I, the TFSA Account holder, revoke any prior des writing), and designate the following person(s)	ignation of beneficiary (or beneficiaries) that I have made for this TFSA (either on the TFSA Beneficiary Designation Form, or separately in as beneficiary (or beneficiaries) to receive the proceeds of the TFSA on my death, subject to the information outlined in the notes above.
share equally)	100% (if any percentage entitlement is indicated, then all entitlements must be completed, otherwise all beneficiaries are deemed to
not valid under applicable provincial or territoria	, 5
of a beneficiary (or beneficiaries) – or may mak	<b>Beneficiary Designations:</b> The TFSA account holder may revoke or change the appointment of a successor account holder or designation e an appointment or designation where one has not been made before – at any time. To do this, the account holder should use the A) Successor Account Holder Appointment and/or Beneficiary Designation Form, which must be signed, dated and delivered to BMO
made automatically as a result of a new marria marriage or common-law relationship or the br appointment and/or revoke or change a desigr	nolder will become ineffective upon divorce or the breakdown of the common-law relationship. However, a new appointment will not be ge or common-law relationship. Also, the designation of a beneficiary will not be revoked or changed automatically as a result of a future eakdown of a marriage or common-law relationship. It is the TFSA account holder's responsibility in these circumstances to make a new ation, if he/she wishes. If the appointment of a successor account holder takes effect (upon the death of the TFSA account holder), the ange the designation of beneficiaries and may appoint a new spouse or common-law partner to be his/her successor account holder.

\*Law of Quebec: Due to differences under the law of Quebec, where Quebec law applies neither an appointment of a successor account holder (on the application form) nor a beneficiary designation (on this form) can be made or given effect. Such an appointment or designation should be made in a will or other written document that meets the requirements for a testamentary disposition under Quebec law.

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