

Legal Name of Trustee	
Member Name	
Member Number and Branch	

I am a (check one):

- ☐ Trustee (where the Trustee is an Individual)
☐ Co-Trustee (where the Trustee is an Individual)
☐ Senior Officer of the Trustee (where the Trustee is not an Individual)
☐ Co-Trustee (where the Trustee is not an Individual)

Contact Information (check one):

- ☐ I am providing contact information for the first time (complete table below)
☐ Contact information has changed (complete table below)
☐ Contact information has not changed since the last Beneficiary Form submission

GENERAL TRUSTEE(S) INFORMATION:

Name			
Street Address			
City		Province	
Postal Code		Phone Number	
Email			

GENERAL CO-TRUSTEE(S) INFORMATION:

Name			
Street Address			
City		Province	
Postal Code		Phone Number	
Email			

Name			
Street Address			
City		Province	
Postal Code		Phone Number	
Email			

BENEFICIARY(IES) INFORMATION:

Name						
Street Address						
City				Province		
Country				Postal Code		
Email				Phone Number		
Beneficial Interest		Primary Beneficiary		Contingent Beneficiary	Percentage Interest	

Name						
Street Address						
City				Province		
Country				Postal Code		
Email				Phone Number		
Beneficial Interest		Primary Beneficiary		Contingent Beneficiary	Percentage Interest	

Name						
Street Address						
City				Province		
Country				Postal Code		
Email				Phone Number		
Beneficial Interest		Primary Beneficiary		Contingent Beneficiary	Percentage Interest	

Name						
Street Address						
City				Province		
Country				Postal Code		
Email				Phone Number		
Beneficial Interest		Primary Beneficiary		Contingent Beneficiary	Percentage Interest	

Name						
Street Address						
City				Province		
Country				Postal Code		
Email				Phone Number		
Beneficial Interest		Primary Beneficiary		Contingent Beneficiary	Percentage Interest	