

# Canadian Tire Tax Free Savings® Account - Successor Holder and Beneficiary Designation



The designation of a successor holder or beneficiary is currently available in all provinces/territories except Quebec and Nunavut. Please complete and sign the form below if you would like to designate a successor holder or beneficiary for your Canadian Tire Tax Free Savings Account.

## Account Holder Information

First Name  Last Name   
Street Number  Unit Number (if applicable)   
Street Name   
City  Province  Postal Code

## Successor Holder Designation

Please note that you may only designate, as Successor Holder, an individual who is considered, under the *Income Tax Act* (Canada), to be your spouse or common-law partner.

I hereby designate my spouse or common-law partner ("Spouse"), named below, to become the Holder and acquire all of my rights as the Holder of my Canadian Tire Tax Free Savings Account in the event of my death before termination of my Canadian Tire Tax Free Savings Account, if he or she survives me. I reserve the right to change or revoke this designation as permitted by applicable law.

Spouse's First Name   
Spouse's Last Name   
Spouse's Social Insurance Number

## Beneficiary Designation

Please note that you may designate one or more individual(s) as beneficiary(ies) to receive the proceeds of your Canadian Tire Tax Free Savings Account if you have not designated your Spouse as Successor Holder or, if you have designated your Spouse as Successor Holder, he or she does not survive you.

I hereby designate each person named below as the beneficiary of my Canadian Tire Tax Free Savings Account to receive all or a portion (as specified below) of the amounts payable under my Tax Free Savings Account in the event of my death, before termination of my Canadian Tire Tax Free Savings Account, if he or she survives me. I reserve the right to change or revoke this designation as permitted by applicable law.

Beneficiary First Name	Beneficiary Last Name	Relationship	Allocation (must add up to 100%)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

I acknowledge that:

- this Successor Holder and Beneficiary Designation form is part of the documentation evidencing my Canadian Tire Tax Free Savings Account and will apply to all property held under my Canadian Tire Tax Free Savings Account on my death; and
- I am solely responsible for ensuring that this Successor Holder and Beneficiary Designation form is, and continues to be, valid under applicable law. As a result of a future relationship or relationship breakdown, a Successor Holder or Beneficiary designation that I make in this form may no longer be effective and it may be necessary for me to complete a new designation for this purpose.

Date  Province or Territory of Execution

Account Holder Signature  Contract Number