

## GUIDELINES FOR COMPLETING THE FORM

### Transfer Form TRF 533 is used to request the following transactions on Canada Savings Bonds, Canada Premium Bonds, Canada Payroll Savings Plans and/or Government of Canada Marketable Bonds:

Add co-owner(s) and survivor to any bond series.

Add survivor to jointly held series for any bond series.

To transfer bonds held "in trust", into the registered owners name alone. In this instance, the signature of the trustee is required in Section F of this form.

Change ownership of any bond series due to separation or divorce. In this instance, please include one of the following legal documents:

**-Divorce Order** (refer to table below to determine if certification or notarization is required).

or

**-Written Separation Agreement - signed by both parties** (refer to table below to determine if certification or notarization is required).

### CERTIFICATION OR NOTARIZATION OF LEGAL DOCUMENTS

The following table outlines the certification or notarization requirements for legal documents required to process this transaction.

Estate par value	\$1000.00 or less	\$1000.01 - \$3500.00	Greater than \$3500.00
Requirement for legal documents	Photocopies of unnotarized documents	Photocopies of notarized documents or court certified documents	Original notarized documents or court certified documents
Requirement for forms	Signed (notarization not required)	Signed and notarized	Signed and notarized

### INSTRUCTIONS

The form must be completed in full in order to be processed. This includes the signatures of all bond owners or their legal representative and the account and/or plan number(s) impacted by the request.

*Note: For your protection, incomplete forms or forms with incorrect information will be rejected.*

**If the transaction involves physical certificate bonds, the unsigned physical certificates** in question must be sent along with the completed form. Matured bonds will be redeemed automatically. Unmatured bonds may be redeemed or transferred, but transferred bonds will not be accompanied by a new physical certificate. New registered owners will receive a letter confirming ownership and including all bond details. The confirmation letter will be sent to the address indicated on the form.

If there has been a legal name change, the Legal Name Change Form (LNC) must be completed and submitted with this form.

Co-owners and the words "**and Survivor**" may be added to the registration of bond(s)/plan(s); however, the individual must be a resident of Canada. You may add more than one co-owner to certificated bonds. By adding a co-owner(s) to any bond (s)/plan(s), you need to be aware that this name cannot be removed once the transaction has been processed, except in the case of a separation or divorce or upon death of one of the owners.

By adding "**and Survivor**" to your bond(s)/plan(s), you understand that your portion of the bond(s)/plan(s) will go to the other co-owner(s) in the event of death, except for residents of the Province of Quebec.

Where a deceased co-owner is a resident of Quebec, the words "**and Survivor**" will not be legally recognized. Therefore, the proceeds from bond(s)/plan(s) registered to a deceased Quebec resident will be distributed according to the deceased's Will, regardless of whether the "**and Survivor**" designation appears on the registration.

Please note that Government of Canada Retail Debt Instruments are also referred to as bonds, plans and securities.

### WHO CAN COMPLETE THIS FORM?

The registered bond owners can complete this form.

In the case where the registered owner is a minor, we require the signature of BOTH parents under Section F of the form.

*Note:* If a legal guardian or only **one parent** are legally acting on behalf of the minor, we require one of the following supporting documents which must contain a "**custody clause**" to identify who can legally represent the minor:

-**Divorce Order** (refer to table above to determine if certification or notarization is required).

or

-**Written Separation Agreement - signed by both parties** (refer to table above to determine if certification or notarization is required).

or

-**Custody Agreement** (refer to table above to determine if certification or notarization is required).

A Power of Attorney acting on behalf of the registered owner can complete this form. Legal documents must be provided (refer to table above to determine if certification or notarization is required).

### EXAMPLES OF ACCEPTABLE REQUESTS

REQUEST	NAME(S) CURRENTLY APPEARING ON THE BOND(S)/PLAN(S)	NEW NAME(S) TO APPEAR ON THE BOND(S)/PLAN(S)	APPLICABLE FOR WHICH BOND SERIES
Adding a co-owner and the rights of survivorship	John Doe	John Doe and Jane Doe and Survivor	Applicable to any bond series
Adding the rights of survivorship to a jointly held bond(s)/plan(s)	John Doe and Jane Doe	John Doe and Jane Doe and Survivor	Applicable to any bond series

### SPECIFIC INSTRUCTIONS

Please print clearly or type the required information into the form fields.

Please be sure to complete all required Sections to avoid delays in processing your request.

Sign page 3 (of the form) and mail your request to the destination indicated on page 3 (of the form).

If space is insufficient, please complete and attach a separate sheet that includes all the required fields, in the same order they appear. Please initial all attached sheets.

### INSTRUCTIONS SPECIFIC TO FILLING OUT SECTIONS B, D AND F OF THE FORM

#### SECTION B - ACCOUNT NUMBERS

Examples of a Payroll Savings Plan Number:

-10 digit number that begins with a "2", e.x.: 2123456789.

-Can be found on a copy of your statement, your T5 slip or **online at CSB Online Services: [mybonds.gc.ca](http://mybonds.gc.ca)**.

Examples of an account or serial number for certificated Canada Savings Bonds, Canada Premium Bonds or Government of Canada Marketable Bonds are:

**Account Number:**

-10 digit number, e.x.: 1234567890.

-Can be found on your T5 slip.

**Serial Number:**

-Located in the top of the bond.

e.x.: CS123F1234567M or CP15F7654321L or H85M023416.

#### SECTION D - REDEMPTION/TRANSFER INSTRUCTIONS

*Note:* Only unmatured bonds may be transferred. All matured bonds will be redeemed automatically.

Enter the names of all registered owners or their legal representatives.

In the "**redemption/transfer**" section, enter all the names of registered owners and the bond(s)/plan(s) information specific to this transaction. Provide the new co-owner's or owner's personal information, including their Social Insurance Number (required by the Income Tax Act).

*Note: If bond(s)/plan(s) quoted in Section B are to be "redeemed/transferred" to more than one registration, please complete an attachment that includes the information seen in Section D for each registration. Please initial all attachments.*

#### SECTION F - FINAL DECLARATION

All the **current** bond owners and co-owners or their legal representative(s) must sign the form.

If the value of the transaction exceeds \$1000.00, their signatures must be either:

- guaranteed by a Canadian Financial Institution acceptable to the Bank of Canada or a member of the Medallion Program.
- OR
- witnessed by a Commissioner for Oaths, properly identified with their stamp and signature present.
- OR
- witnessed by a Notary Public, properly identified with their Notary seal/stamp and signature present.

**SECTION A - CURRENT ACCOUNT DETAILS**

*Note: If you are unsure of the current address we have on file, please provide all your previous addresses on a separate sheet. Please initial all attached sheets.*

**REGISTRATION - currently appearing on the bonds/plans**

Social Insurance Number  
(required by the Income Tax Act)

Care of  (if applicable)

Address  (include Apt. No., R.R. or P.O. Box)

City  Province  Postal Code

Country  Telephone (primary)  -  -  Telephone (other)  -  -

**SECTION B - ACCOUNT NUMBERS**

*\*Refer to page 2 of the guidelines.*

Payroll Savings Plan Number

Canada Savings Bonds, Canada Premium Bonds or Government of Canada Par value \$

**Marketable Bonds Account Number(s)** Par value \$

*Note: If space is insufficient, please complete and attach a separate sheet that include all the required fields, in the same order they appear. Please initial all attached sheets.*

Par value \$

**or - the Bond Serial Number(s)**

<input style="width: 90%; height: 20px;" type="text"/> Par value \$ <input style="width: 80px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/> Par value \$ <input style="width: 80px;" type="text"/>
<input style="width: 90%; height: 20px;" type="text"/> Par value \$ <input style="width: 80px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/> Par value \$ <input style="width: 80px;" type="text"/>
<input style="width: 90%; height: 20px;" type="text"/> Par value \$ <input style="width: 80px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/> Par value \$ <input style="width: 80px;" type="text"/>
<input style="width: 90%; height: 20px;" type="text"/> Par value \$ <input style="width: 80px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/> Par value \$ <input style="width: 80px;" type="text"/>

I have attached the unsigned bond certificate(s) to this request.

**SECTION C - LEGAL DOCUMENTATION DETAILS**

*Note: Only original documents will be returned unless specified otherwise.*

Please acknowledge the following:

I have attached the required legal document(s) as per the guidelines.

**\*PLEASE REMEMBER TO COMPLETE SECTIONS D AND F ON PAGES 2 AND 3**

**SECTION D - REDEMPTION/TRANSFER INSTRUCTIONS**

Notes:

-All matured bonds will be redeemed automatically.

Redemption requests can be done by direct deposit or if the bond series being transferred is related to "regular interest bonds", the owner has the option to request their annual interest be deposited directly into their bank account, by completing Section E - Direct Deposit Set Up, on page 3.

-Cheque(s) or letters confirming ownership will be sent to the address provided below under **\*\*\*Mailing Address\*\*\***.

Know all men by these presents that I/we:

Name of the bond owner(s) or authorized representative(s)

for value received, do hereby request that the securities listed here:

<b>Bond Series</b>	<input type="text"/>	<b>Par value \$</b>	<input type="text"/>
--------------------	----------------------	---------------------	----------------------

be REDEEMED/TRANSFERRED in favour of the following:

**REDEEM:** Select this box if you are requesting to redeem Canada Savings Bonds (Series 32 and up), Canada Premium Bonds, old style CSBs (Series 1-31) and/or Government of Canada Marketable Bonds.  
All matured bonds will be automatically redeemed. By selecting this box, payment is to be issued as follows:

**PAYABLE TO:**

**TRANSFER:** By selecting this box, bond(s)/plan(s) will be created in one of the following **NEW REGISTRATIONS:**  
Note: Only unmaturred bonds may be transferred to a new registered owner.

**SINGLE REGISTRATION**

Name of new registered owner:

**JOINT REGISTRATION**

Names of new registered owners: (1)  and (2)

\*Check  this box to add "and Survivor" Option Only

Notes:

-In the Province of Quebec, the term "and Survivor" does not apply under the current law.  
-Series starting with CSB S114 and CPB P64 will automatically be registered "Joint and Survivor".

Preferred language of communication:  French  English

Date of birth (dd/mmm/yyyy)  /  /

Social Insurance Number (required by the Income Tax Act)

**\*\*MAILING ADDRESS\*\***

Care of  (if applicable)

Address  (include Apt. No., R.R. or P.O. Box)

City  Province  Postal Code

Country  Telephone (primary)  -  -  Telephone (other)  -  -

**SECTION E - DIRECT DEPOSIT SET UP** \*Attach a "PERSONALIZED VOID CHEQUE" to this form\*.

*Note: The Bank Account (cheque) must be in the names of ALL bond owner(s).*

**If you do not have a personalized void cheque, fields 1-5 below, MUST all be filled out. The financial institution MUST affix their branch stamp in field 5 once they have completed the verification of fields 1-4.**

<p><b>1</b> Name of the Registered Bank Account Holder(s)</p>	<b>5</b>
<p><b>2</b> Branch Number      <b>3</b> Institution Number      <b>4</b> Account Number</p>	
<p><i>Branch stamp here</i></p>	

**SECTION F - FINAL DECLARATION**

- I (We) give all right, title and interest in the securities described above absolutely and the Bank of Canada is hereby authorized to make such entries in the books of registration as are required to give effect to such redemption/transfer.
- In the case of jointly owned bonds, the registered owners consent to the Bank of Canada adding "and Survivor" to the registration.

Declared before me at  on \_\_\_\_ / \_\_\_\_ / \_\_\_\_ .  
City Date: dd/mmm/yyyy

<p>If the par value of transaction exceeds \$1000.00:</p> <p><input type="radio"/> Canadian Financial Institution: Signature Guaranteed stamp, Endorsement Guaranteed stamp or Medallion Guaranteed stamp and authorized signature required.</p> <p><input type="radio"/> Commissioner for Oaths: Stamp and signature required (not to be used for par values exceeding \$20,000).</p> <p><input type="radio"/> Notary Public/Lawyer: Notarial stamp/seal and signature required.</p>	<p><input type="radio"/> I am the registered owner of the bond(s)/plan(s).</p> <p><input type="radio"/> I am the legal guardian/parent of the minor bond owner.</p> <p><input type="radio"/> I am a legal representative acting on behalf of the bond owner.</p>	<p><input type="radio"/> I am the registered owner of the bond(s)/plan(s).</p> <p><input type="radio"/> I am the legal guardian/parent of the minor bond owner.</p> <p><input type="radio"/> I am a legal representative acting on behalf of the bond owner.</p>
<p><i>I swear that I have witnessed and guarantee that the person signing on the right, as the registered owner(s) or as the legal representative(s) for the registered owner, is/are whom they say they are.</i></p> <p>Place stamp / seal and sign here</p> <p style="text-align: center;">_____ Signature</p>	<p style="text-align: center;">_____ Signature</p>	<p style="text-align: center;">_____ Signature</p>
<p><i>Note: Any alterations must be initialed by the registered owner(s) or the legal representative(s) for the registered owner before the declaration is signed.</i></p>		

**Once fully completed, the form can be sent by:**

- MAIL to: P.O. Box 2770, Station D • Ottawa, Ontario K1P 1J7 -for Certificate Bonds and for Bonds purchased through the Payroll Savings Program.
- COURIER delivery: 2500 Solandt Rd • Suite 100 • Kanata, Ontario K2K 3G5

**If you require further information, please contact Customer Service, Monday to Friday, 9 a.m. to 5 p.m. (ET) at:**

<ul style="list-style-type: none"> <li>• for Bonds purchased through the Payroll Savings Program</li> </ul>	1 877 899-3599
<ul style="list-style-type: none"> <li>• for certificated Canada Savings Bonds (series 32 and up) and Canada Premium Bonds</li> </ul>	1 800 575-5151
<ul style="list-style-type: none"> <li>• by TTY(teletypewriter)</li> </ul>	1 800 354-2222
<ul style="list-style-type: none"> <li>• for Canada Savings Bonds (series 1 - 31) or Government of Canada Marketable Bonds (Monday to Friday, 8 a.m. to 4 p.m. (ET) Bank of Canada, Retail and Wholesale Debt Administration, 234 Wellington, 2 West, Ottawa, Ontario K1A 0G9</li> </ul>	1 800 665-8650

Please visit us online at: [csb.gc.ca](http://csb.gc.ca)

The personal information provided on this form is protected under the provisions of the **PRIVACY ACT** and will be used solely for the purpose for which it was collected.