

**APPOINTMENT OF SPOUSE OR COMMON-LAW PARTNER AS  
SUCCESSOR ACCOUNT HOLDER\***

\_\_\_\_\_  
**Account #**

\_\_\_\_\_  
**Account Holder's Last Name**

\_\_\_\_\_  
**First Name**

I, the TFSA Account Holder, appoint my spouse or common-law partner (named below) to be the successor account holder of the TFSA upon my death. As the successor account holder, my spouse or common-law partner will acquire all of my rights as the account holder of the TFSA upon my death, and the TFSA will continue in his/her name. (The words "spouse" and "common-law partner" here have the meaning given to them under the *Income Tax Act*.)

I understand that this appointment will not be 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 me). I understand that I may revoke or change this appointment at any time, and that it is my responsibility to make a new appointment if my marriage or common-law partnership breaks down (or the person named below dies before me) and I wish to appoint another person.

\_\_\_\_\_  
Spouse or Common-Law Partner's Last Name  
[Please Print]

\_\_\_\_\_  
First Name

\_\_\_\_\_  
Spouse or Common-Law Social Insurance Number

\_\_\_\_\_  
TFSA Account Holder Signature

\_\_\_\_\_  
Date (DD/MM/YYYY)

\* This appointment cannot be made in Quebec, because of differences under Quebec law.