

YOUR QUESTRADE ACCOUNT
(eight digits, numbers only)

Fill out this form to transfer your registered account to us. Registered transfers include your RRSP, Spousal RRSP, LRSP, LIRA, TFSA, RRIF, Spousal RRIF, LRIF, and LIF. **RESP transfers are filled out on a [different form](#).** You may only transfer **one registered account** per form. Please ensure the account you are transferring is the same account type as your account at Questrade (i.e. RRSP to RRSP).

ACCOUNT HOLDER INFORMATION

FIRST NAME OF ACCOUNT HOLDER (please print)		LAST NAME OF ACCOUNT HOLDER (please print)	
ADDRESS	CITY	PROVINCE	POSTAL CODE
SOCIAL INSURANCE NUMBER		PRIMARY PHONE NUMBER	

DELIVERING INSTITUTION INFORMATION (institution you're transferring from)

NAME OF BANK/BROKERAGE	ACCOUNT NUMBER	GROUP PLAN NUMBER (if applicable)	
ADDRESS OF BANK/BROKERAGE	CITY	PROVINCE	POSTAL CODE

ACCOUNT TRANSFER INSTRUCTIONS

There are three ways to transfer your money to us:

- **All in cash** – you want your financial institution to sell your investments and send us cash
- **All in kind** – you want your financial institution to transfer all of your investments and cash exactly as they are now in your current account
- **Partial** – you want your financial institution to transfer specific investments and/or cash. You need to list the investments and how much cash you want to transfer to your Questrade account on page 3

For Registered Income Fund (RIF), Life Income Fund (LIF), or Locked-in Retirement Income Fund (LRIF) transfers:

The broker you're transferring from is generally required to pay you the full year's minimum payment, including payments you want to withdraw up to your maximum amount. This must be done before the transfer can be processed. To avoid delays, please ensure that there are sufficient funds in your account to cover the payment.

Rejected transfers:

An account transfer may be rejected by the broker you're transferring from for several reasons, such as insufficient funds to cover fees or an account is not in good standing, etc. We will let you know if your transfer is rejected.

REGISTERED ACCOUNT TRANSFER DETAILS

Fill in this section if you are transferring a registered account to us. **Select only one registered account.** If you select LRSP, LIRA, LRIF, or LIF, please include the governing legislation (province).

REGISTERED ACCOUNT TYPE – RSP574-571	REGISTERED ACCOUNT TYPE – RIF1447	TFSA	TYPE OF TRANSFER (select one)
<input type="radio"/> RRSP <input type="radio"/> Spousal RRSP <input type="radio"/> LRSP Province: _____ <input type="radio"/> LIRA Province: _____	<input type="radio"/> RRIF <input type="radio"/> Spousal RRIF <input type="radio"/> LRIF Province: _____ <input type="radio"/> LIF Province: _____	<input type="radio"/> TFSA	<input type="radio"/> All in kind <input type="radio"/> All in cash <input type="radio"/> Partial (see below)

Transfer ID: _____

PARTIAL TRANSFER DETAILS

Fill out this section **only if you selected partial transfer** in the account transfer section.

SYMBOL/CUSIP	SECURITY NAME	QUANTITY	CURRENCY	TRANSFER TYPE
			<input type="radio"/> CAD <input type="radio"/> USD	<input type="radio"/> In kind <input type="radio"/> In cash
			<input type="radio"/> CAD <input type="radio"/> USD	<input type="radio"/> In kind <input type="radio"/> In cash
			<input type="radio"/> CAD <input type="radio"/> USD	<input type="radio"/> In kind <input type="radio"/> In cash

SIGNATURE(S)

Please include a copy of your most recent statement from the delivering institution.

In the event that, for any reason, any of the securities held for my account cannot be delivered to Questrade Inc. in accordance with this instruction, I request that you contact me in writing immediately, indicating the security affected and the reason for the inability to deliver. I acknowledge that you may require a fee to be paid prior to delivery of this account(s) and hereby instruct Questrade Inc. to pay or deduct from any credit balance with you this fee in accordance with your current published schedule. I have also requested Questrade Inc. to act on my behalf in the resolution of any incidental account differences or adjustments which may arise with you as a result of this transfer request. **Please cancel all open orders (G.T.C./SFW/PAC, etc.) for my account(s) on your books.**

I certify that the information in this form is accurate and authorize the transfer of my account to Questrade. Where I have requested a transfer in cash, I authorize the liquidation of all or part of my investments. I agree to pay any applicable fees, charges or adjustments. **If this is a joint account, both the account holders must sign.**

SIGNATURE	DATE (dd/mmm/yyyy)

UPLOAD AND MAILING INSTRUCTIONS

Once you have **completed and signed** this form, you can either upload or mail it to us.

[Upload](#) this form:

- Log in to Questrade
- In the top navigation menu, hover over **ACCOUNT MANAGEMENT**
- Click or tap **Upload documents**

OR

Mail this form:

Questrade, Inc.
5700 Yonge Street, Unit G1 – Ground Floor
Toronto, ON M2M 4K2

You can also monitor the status of your transfer in the Questrade customer portal. In the **ACCOUNTS** area, hover over **FUNDING** in the top navigation menu, and then click or tap **Transfer account to Questrade history**.

FOR USE BY DELIVERING INSTITUTION ONLY

Questrade agrees to administer any locked-in funds transferred under this transfer authorization according to the governing pension legislation indicated in the registered account transfer details. It is the legal responsibility of the delivering institution to provide this information to the receiving institution. Failing to receive it, we will assume that the information in the registered account transfer details is accurate.

REGISTERED ACCOUNT TYPE		SPOUSAL PLAN: <input type="radio"/> NO <input type="radio"/> YES If yes, provide:		LOCKED-IN: <input type="radio"/> NO <input type="radio"/> YES If yes, provide:	
<input type="radio"/> RRSP	<input type="radio"/> RRIF	FIRST AND LAST NAME	SIN NUMBER	LOCKED-IN FUNDS	GOVERNING LEGISLATION
<input type="radio"/> LRSP	<input type="radio"/> LRIF				
<input type="radio"/> LIRA	<input type="radio"/> LIF				
<input type="radio"/> TFSA					

QUESTRADE INFORMATION

NAME OF BROKERAGE		C/O:	ADDRESS			
QUESTRADE, INC.		ACCOUNT TRANSFERS	NORTH AMERICAN CENTRE, 5700 YONGE STREET, UNIT G1, TORONTO, ON M2M 4K2			
DTC #	CUID #	DEALER	REP CODE	PHONE NUMBER	FAX NUMBER	EMAIL ADDRESS
5084	QSTR	7900	BSN	416-227-7601	416-227-0078	transferin@questrade.com