



# Transfer Authorization

for individual or joint Investment accounts

## 1 ACCOUNT INFORMATION

Last Name (Primary account holder)		First Name	
Last Name (Joint account holder)		First Name	
Street Address	Apt.	City	Province Postal Code
Date of Birth (YYYYMMDD)	Social Insurance Number		
Home Tel.	Business Tel. Number		

## 2 TRANSFER FROM (note: if possible, please attach a photocopy of a recent statement for your account)

Name of Relinquishing Institution	Account Number
Street Address	City Province Postal Code

## 3 THE TRANSFER PROCESS & INSTRUCTIONS

- If you request a transfer in cash, the specified assets are sold or redeemed by the relinquishing institution. Your account is transferred in cash to a Franklin Templeton Investments Corp. account, where it is invested per your instructions. We will invest your Franklin Templeton Investments Corp. transfer on the valuation date that we receive the funds from the relinquishing institution. If you request a transfer in kind, your existing holdings are transferred as is (only Franklin Templeton Investments Corp. funds may be transferred as is).
- Once we receive your Transfer Authorization and investment instructions we forward the Transfer Authorization to the relinquishing institution. If your account information is incomplete the relinquishing institution may delay or reject your transfer request. To assist in the process, we recommend that you include a copy of your account statement from the relinquishing institution that details the investments to be transferred.
- If your holdings from the relinquishing institution are in a fixed term investment that is close to maturity, such as a GIC or term deposit, we recommend that you contact the institution directly to ensure that the investment(s) will not be automatically renewed. It may be locked-in for another term, in which case your transfer request could be rejected. As well, the relinquishing institution may honor your transfer but impose a penalty for the liquidation of your investment prior to its maturity.
- The turnaround time for Franklin Templeton Investments Corp. to receive the cheque or funds for the transfer depends on the relinquishing institution. Typically, the entire process will take about three weeks, with additional delays possible during the RSP season deadline.

Please indicate the amount you are transferring from the above account by checking ONE box only:

- All assets in the account, transferred as cash     Partial withdrawal in cash (specify investments in table below)  
 All Franklin Templeton Investments Corp. assets in kind investments in table below

For partial withdrawals only, please provide details of the investments you wish to transfer. If you have additional investments, please attach a list.

NAME OF INVESTMENT	AMOUNT
	\$
	\$
	\$
	\$
<b>TOTAL</b>	<b>\$</b>

## 4 TRANSFER TO: Franklin Templeton Investments Corp. 5000 Yonge Street, Suite 900, Toronto, Ontario M2N 0A7

For use by Mutual Fund Broker/Dealers Only

Dealer Name	Dealer Number
Agent Name	Agent Number Franklin Templeton Account Number
Business Tel. Number	Business Fax Number Dealer Account Number

Investment Instructions:

INVESTMENT NAME	SYMBOL	% OR \$ AMOUNT

## 5 CLIENT AUTHORIZATION

By signing here, you request the transfer of your investments as described above. If you have requested a transfer in cash, you understand that all or part of your investments will be liquidated and you agree to pay any fees or penalties charged by the relinquishing institution that may apply.

Signature (Primary Account holder)	2 0                     Date (YYYYMMDD)
Signature (Joint Account holder)	2 0                     Date (YYYYMMDD)