



Holder Information

Name (Last name, first name)

Gender

Birthdate

SIN

Surname, birthdate and SIN must match CRA records.

(DD/MM/YYYY)

Residential Address Contact:

Street

Apt./ Suite

H. Ph.

City

Prov.

B. Ph.

PC

Country

Email

Address

Please Review Carefully and Sign Below

To: Concentra Trust – Trustee

- I hereby apply for participation in the Canadian Worker Co-operative Federation Tax-Free Savings Account (TFSA) in accordance with the Declaration of Trust supplied to me.
- I request the Trustee to file an election to register my qualifying arrangement as a TFSA under the *Income Tax Act* (Canada).
- I request that this contribution, and any subsequent contributions be deposited with Canadian Worker Co-operative Federation by the Trustee and I acknowledge that the terms and conditions of such deposits have been and will be agreed upon between myself and Canadian Worker Co-operative Federation and such deposits will be held by the Trustee.
- I hereby acknowledge that I am solely responsible for determining the amount of contribution to the TFSA.
- I hereby agree to notify the Trustee in the event that I am no longer a resident of Canada.
- I hereby acknowledge that I am at least 18 years of age.
- I hereby acknowledge that I am of the age of majority.
- I confirm that the information provided to Concentra Financial Services Association, its agents or affiliates (collectively "Concentra Financial") as set out in this application is complete and accurate. I acknowledge that Concentra Financial may rely upon this information until it is notified in writing of any changes. I hereby agree and consent to, and accept this as notice of, the terms of the Concentra Financial Confidentiality and Privacy Statement (located at http://www.concentrafinancial.ca/confidential_privacy.asp). I further agree and consent to Concentra Financial obtaining and retaining my personal information in order to ascertain my identity as required by the *Proceeds of Crime (Money Laundering) and Terrorist Financing Act* and as required by law.

Accepted by Canadian Worker Co-operative Federation
Authorized Agent for the Trustee

Date

Holder's Signature