



Holder Information

Name (Last name, first name)

Gender

Birthdate

(DD/MM/YYYY)

SIN

Surname, birthdate and SIN must match CRA records.

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 understand and acknowledge that the personal information contained herein is being collected by Concentra Trust (the "Trustee") and that by signing below, I confirm that I have read and consent to the terms of the "Concentra" Privacy Policy located on the Concentra website at concentra.ca or by contacting the Trustee at 1-800-788-6311. "Concentra" refers to Concentra Bank and its wholly-owned subsidiary Concentra Trust. I confirm that the information provided herein is true and accurate and I agree to make the Agent, on behalf of the Trustee, aware of any changes to the personal information contained on this application form.

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

Date

Holder's Signature