

GUIDELINES FOR COMPLETING THE FORM

IMPORTANT INFORMATION

Only the account information you provide will be updated.

The form must be completed in full in order to be processed. This includes the signature of the bond owner who is changing their name and all the registration account / plan number(s) that require the change.

Note: For your protection, incomplete forms or forms with incorrect information, or incorrect documentation will be rejected and will result in the delay of your request.

If the transaction involves physical certificate bonds, the unsigned physical certificates in question must be sent along with the completed form. The replacement bond(s) will be sent to the address indicated on the form.

If you are also requesting a change in your Direct Deposit information, complete the COADD Form (please ensure to include this Legal Name Change Form with your request) or go online to CSB Online Services at mybonds.gc.ca.

Note: The online option for enrollment or changes to banking information is only available for Single Plans.

WHO CAN COMPLETE THIS FORM?

The registered bond owner who is changing their name can complete this form.

The legal guardian(s)/parent(s) acting on behalf of the minor bond owner can complete this form.

REQUIRED LEGAL DOCUMENTS

Note: PHOTOCOPIES AND/OR FAX COPIES OF LEGAL DOCUMENTS ARE NOT ACCEPTABLE.

One of the following documents in **Options 1 to 3** must accompany your request as proof of the legal name change:

Option 1:

A certified copy of both the:

-Birth Certificate

and

-Social Insurance Card

certified by a Notary Public, a Lawyer, a Court Official or a financial institution.

Option 2:

Either:

- **Marriage Certificate - an ORIGINAL** or a **certified copy** prepared by a Notary Public, a Lawyer, a Court Official, a Commissioner for Oaths or a financial institution properly identified with stamp/seal and signature present.

or

- **An Adoption Order, a Divorce Order, an Annulment Order, a Marriage Separation Agreement or a legal name change document - an ORIGINAL** or a **certified copy** prepared by a Notary Public, a Lawyer, or a Court Official properly identified with stamp/seal and signature present.

*Note: If you select **Option 2**, and there are variations in names between the legal document and the name(s) appearing on the bonds/plans, we will require a letter of guarantee (**Option 3**) from a financial institution, on their letterhead, stating that the name appearing on the document and the name(s) on the plan/bond(s) refer to one and the same person (e.g., Joan Elizabeth Mary Smith and Joan Elizabeth Smith refer to one and the same person).*

Option 3:

An **ORIGINAL** letter of guarantee addressed to Canada Savings Bonds from a financial institution. An acceptable letter of guarantee must:

- Be presented on either the institution's letterhead or on paper that bears the institution's identification stamp;
- Be dated;
- Indicate both the original name as well as the new name;
- Contain the bond owner's address and Social Insurance Number for our records;
- State both names (old and new) and that these variations refer to one and the same person and that there is no change in ownership;
- Be signed by an authorized representative of the financial institution.

SPECIFIC INSTRUCTIONS

Please print clearly or type the required information into the form fields.

Please be sure to complete all required Sections to avoid delays in processing your request.

Sign page 2 (of the form) and mail your request to the destination indicated on page 2 (of the form).

If space is insufficient, please complete and attach a separate sheet that includes all the required fields, in the same order they appear. Please initial all attached sheets.

INSTRUCTIONS SPECIFIC TO FILLING OUT SECTION B OF THE FORM

SECTION B - Account Numbers

Examples of a Payroll Savings Plan Number:

-10 digit number that begins with a "2" ex: **2123456789**.

-can be found on a copy of your statement, your T5 Slip or **online at CSB Online Services: mybonds.gc.ca**.

Examples of an account or serial number for Canada Savings Bond/Premium Bond are:

Account Number:

-10 digit number ex: **1234567890**.

-can be found on a copy of your statement or your T5 slip.

Serial Number:

-located in the top center of the bond

ex: **CS123F1234567M** or **CP15F7654321L**

Examples of a Canada RSP/RIF Plan Number:

-can be up to 11 digits long ex: **01234567890**.

-**The Canada RSP** number can be found on your semi-annual statement.

-**The Canada RIF** number can be found on your quarterly statement.

SECTION A - CURRENT ACCOUNT DETAILS

Note: If you are unsure of the current address we have on file, please provide all your previous addresses on a separate sheet. Please initial all attached sheets.

REGISTRATION - currently appearing on the bonds/plans

____ / ____ / ____
Date of birth Social Insurance Number
(dd/mmm/yyyy) (required by the Income Tax Act)

Care of (if applicable)
Address (include Apt. No., R.R. or P.O. Box)
City Province Postal Code
Country Telephone (primary) - - Telephone (other) - -

SECTION B - ACCOUNT NUMBERS

**Refer to page 2 of the guidelines.*

Payroll Savings Plan Number

Canada Savings Bond or Canada Premium Bond Account Number(s) Par value \$

Note: If space is insufficient, please complete and attach a separate sheet that include all the required fields, in the same order they appear. Please initial all attached sheets.

_____ Par value \$
_____ Par value \$
_____ Par value \$

or - the Bond Serial Number(s)

_____ Par value \$ <input type="text"/>	_____ Par value \$ <input type="text"/>
_____ Par value \$ <input type="text"/>	_____ Par value \$ <input type="text"/>
_____ Par value \$ <input type="text"/>	_____ Par value \$ <input type="text"/>
_____ Par value \$ <input type="text"/>	_____ Par value \$ <input type="text"/>

I have attached the unsigned bond certificate(s) to this request.

The Canada RSP/RIF Plan Number

NOTE: PLEASE REMEMBER TO COMPLETE SECTIONS C, D AND E ON PAGE 2

SECTION C - NEW ACCOUNT DETAILS

Note: The bond certificate(s) (if applicable), under this NEW registration, will be sent to this address.

NEW REGISTRATION

to appear on bonds / plans

Care of (if applicable)

Address (include Apt. No., R.R. or P.O. Box)

City Province Postal Code

Country Telephone (primary) - - Telephone (other) - -

SECTION D - LEGAL DOCUMENTATION DETAILS

Note: Only original documents will be returned unless specified otherwise. Letters of Guarantee will be kept on file.

Please acknowledge the following:

I have attached the required legal document(s) as per the guidelines.

SECTION E - PROVIDE SIGNATURE(S) OF ALL REGISTERED OWNERS

Note: An authorized representative may sign on behalf of the bond owner, if proper legal documents are provided by mail.

I am the registered owner of the bond(s)/plan(s).

I am the legal guardian/parent of the minor bond owner.

I am a legal representative acting on behalf of the bond owner.

_____/_____/_____
Signature Date: dd/mmm/yyyy

I am the registered owner of the bond(s)/plan(s).

I am the legal guardian/parent of the minor bond owner.

I am a legal representative acting on behalf of the bond owner.

_____/_____/_____
Signature Date: dd/mmm/yyyy

Once fully completed, the form can be sent by:

- MAIL to: P.O. Box 2770, Station D • Ottawa, Ontario K1P 1J7 -for Certificate Bonds and for Bonds purchased through the Payroll Savings Program
- P.O. Box 2390, Station D • Ottawa, Ontario K1P 1K8 -for The Canada RSP/RIF
- COURIER delivery: 50 O'Connor Street • Suite 201 • Ottawa, Ontario K1P 1J7

If you require further information, please contact Customer Service, Monday to Friday, 8 a.m. to 8 p.m. (ET) at:

- for Bonds purchased through the Payroll Savings Program 1 877 899-3599
- for Certificate Bonds or The Canada RSP/RIF 1 800 575-5151
- by TTY(teletypewriter) 1 800 354-2222

Please visit us online at: csb.gc.ca

The personal information provided on this form is protected under the provisions of the **PRIVACY ACT** and will be used solely for the purpose for which it was collected.