

## GUIDELINES FOR COMPLETING THE FORM

### IMPORTANT INFORMATION

If you have a Single Plan in the Payroll Savings Program, you can also change your address, enroll in Direct Deposit or change your existing banking information online by logging on to CSB Online Services at: [mybonds.gc.ca](http://mybonds.gc.ca)

The form must be completed in full in order to be processed. This includes the signatures of all bond owners and the registration account / plan number(s) that require the change.

*\*For your protection, incomplete forms or forms with incorrect information will be rejected.*

Only the account information you provide will be updated.

If there has been a legal name change, the Legal Name Change Form LNC must be completed and submitted with this form **by mail**.

For regular-interest bond owners, please be aware that in order to receive your annual interest payment in time, we must receive your new address or direct deposit information at least two months prior to the interest payment date.

### WHO CAN COMPLETE THIS FORM?

The bond owner(s) can complete this form.

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

A legal representative acting on behalf of the bond owner providing the following legal documentation (see certification or notarization rules below):

Power of Attorney

Last Will and Testament, the Death Certificate or Letters Probate /Administration.

### CERTIFICATION OR NOTARIZATION OF LEGAL DOCUMENTS

Depending on the par value of outstanding holdings held in the account, legal documents may need to be certified or notarized. Consult the table below.

Par value of holdings	\$1000.00 or less	\$1000.01 - \$3500.00	Greater than \$3500.00
Requirement for legal documents	Photocopies of unnotarized documents	Photocopies of notarized documents or court certified documents	Original notarized documents or court certified documents

Acceptable notarization or certification of documents:

- Guaranteed by a Canadian Financial Institution acceptable to the Bank of Canada or a member of the Medallion Program (unless otherwise specified)
- Certified by a Commissioner for Oaths, identified with their stamp or signature (unless otherwise specified)
- Notarized by a notary public, identified with their official stamp/seal or signature

\*Requests containing legal documents must be mailed **not** faxed.

**INSTRUCTIONS SPECIFIC TO FILLING OUT SECTIONS A,C AND E OF THE FORM**

**SECTION A - 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](http://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 C - CURRENT or NEW address**

-for Non Residents

If you have a non-Canadian address, please contact the Canada Revenue Agency in order to determine your individual residency status.

**SECTION E - Direct Deposit Change/Set up and/or Redemption**

If you are not providing a personalized VOID cheque for your direct deposit details, all 5 fields in Section E of the form must be filled out. When the financial institution places their branch stamp, they are validating that the details entered in these fields are true and accurate.

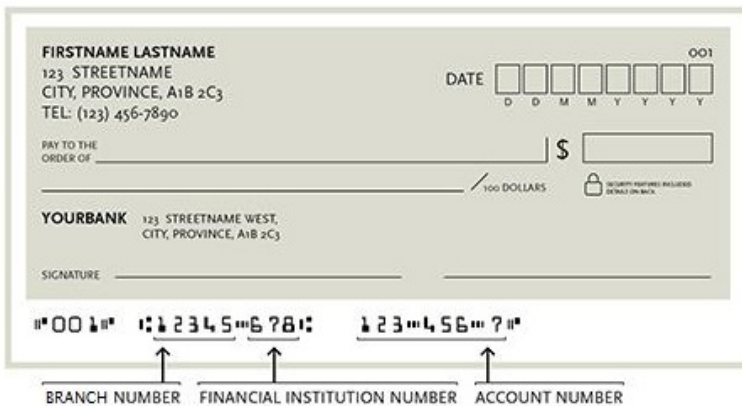
If you are attaching a personalized VOID cheque, it must have the following characteristics:

**Example: PERSONALIZED VOID CHEQUE**

The new banking information must be in the names of all the bond owners.

All bond owners' names must be pre-imprinted by the financial institution on the top left hand corner of the cheque.

For the Canada Payroll Savings Program, this account information will replace any previous payment instructions on the plan(s) provided on the form.



**SELECT TYPE OF REQUEST**

<input type="checkbox"/> Change of Address.	<b>COMPLETE</b> A, B, C, D & F
<input type="checkbox"/> Direct Deposit change or set up.	A, B, C, E & F

**Note: If space is insufficient, please attach a separate page that includes the fields requested and initial all attached pages.**

**SECTION A - Select all account numbers that require updating**

*Refer to page 2 of the guidelines.*

**Payroll Savings Plan Number**

Date of Birth: dd/mmm/yyyy \_\_\_ / \_\_\_ / \_\_\_ Last Contribution Amount \$

**Canada Savings Bond or Canada Premium Bond Account Number**

or - the Bond Serial Number(s)

**The Canada RSP/RIF Plan Number**

Date of Birth: dd/mmm/yyyy \_\_\_ / \_\_\_ / \_\_\_

**and** - If the RSP was purchased through the Payroll Savings Program, also provide the: Last Contribution Amount \$

**SECTION B - Enter name(s) of ALL registered owner(s)**

Surname   
Given Name  Initial(s)

Co-owner (if applicable):

Surname   
Given Name  Initial(s)

**SECTION C - Enter CURRENT/NEW address**

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

Country  *If your NEW address is outside of Canada, please select one of the following options:*  
 I am a Canadian resident for tax purposes.  
 I am not a Canadian resident for tax purposes since (dd/mmm/yyyy): \_\_\_ / \_\_\_ / \_\_\_

**SECTION D - Enter OLD address (for a change in address only)**

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

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

**NOTE: PLEASE REMEMBER TO COMPLETE SECTION F - THE SIGNATURE OF ALL REGISTERED OWNERS.**

**SECTION E - Direct Deposit Change/Set up and/or Redemption**

Attach a "PERSONALIZED VOID CHEQUE" to this form.

*Note: The Bank Account (cheque) must be in the names of ALL bond owner(s).*

**If you do not have a personalized void cheque, fields 1-5 below, MUST all be filled out.**

**The financial institution MUST affix their branch stamp in field 5 once they have completed the verification of fields 1-4.**

<b>1</b>	Name(s) of account holder(s)	
<b>2</b>	<b>3</b>	<b>4</b>
Branch Number	Institution Number	Account Number
<b>5</b> Branch stamp here		

*Note For Payroll Savings Plan Owners: When co-owners sign this form, they both authorize the Bank of Canada to make redemptions at the request of either co-owner, to process the redemption of the above plan and deposit the proceeds in the account specified above or on the attached voided cheque provided. The authorizations will remain in effect until the Bank of Canada receives written notice signed by either or both co-owners terminating these authorizations.*

An immediate redemption request is optional and only allowed on this form for first time direct deposit set up or any changes to banking information.

Amount \$ \_\_\_\_\_

redeem this amount from the Payroll Savings Plan noted in Section A.

redeem this amount from the Canada RSP/RIF Plan noted in Section A.

*Note: RSP/RIF redemptions are subject to withholding tax*

**SECTION F - Provide signature(s) of ALL registered owners**

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

*-If space is insufficient (more than two bond owners), the other co-owners must sign below also.*

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.

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 \_\_\_\_\_

Signature \_\_\_\_\_

Date: dd/mmm/yyyy \_\_\_\_\_

**Once fully completed, the form can be sent by:**

• FAX to: \_\_\_\_\_ for Bonds purchased through the Payroll Savings Program, Certificate Bonds and The Canada RSP/RIF 613 782-8096

*Note: If legal documentation is required the request must be mailed not faxed.*

*Caution: Please protect your personal information by verifying that the correct fax number has been dialed prior to transmitting your fax.*

• 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: 1145 Innovation Drive • Suite 200 Kanata, Ontario K2K 3G8

**If you require further information, please contact Customer Service, Monday to Friday, 9 a.m. to 5 p.m. (ET) at:**

• for Bonds purchased through the Payroll Savings Program, 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](http://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.