

NAME CHANGE REQUEST FORM

Branch _____	Account Number _____
IA Name _____	Account Number _____
IA Code _____	Account Number _____
Account Name _____	Account Number _____

New Account(s) Name: _____

Name Change for Individuals

Name Change Due to Marriage

Documentation Requirements:

- Branch Management certified true copy of the Marriage Certificate; **OR**
- Photocopy of a piece of government issued ID (excluding SIN card) in new name; **AND**
- Updated QI Documentation

Name Change Due to Divorce or Conversion to Maiden Name

Documentation Requirements:

- Branch Management certified true copy of the Birth Certificate indicating maiden name; **OR**
- Photocopy of a piece of government issued ID (excluding SIN card) in new name; **AND**
- Updated QI Documentation

Legal Name Change (Not due to Marriage, Divorce, or Conversion to Maiden Name)

Documentation Requirements:

- Photocopy of Legal Name Change document/certificate issued by the Province; **AND**
- Photocopy of government issued ID (excluding SIN card) in new name; **AND**
- Updated QI Documentation

Other: Indicate Reason _____

Please refer to the [Documentation Wizard](#) for detailed instructions and documentation requirements. Where required, provide old and new client signatures below.

Client Authorization: I, the undersigned client, wish to change the name on the above-mentioned account(s) to the New Account(s) Name indicated above. *(When complete and signed, this form replaces the required client Letter of Direction.)*

<u> X </u>	<u> X </u>	
Old Client Signature	New Client Signature	Date

Change to Estate – Non-Registered Accounts Only

Please refer to the [Documentation Wizard](#) for detailed instructions and documentation requirements. *For registered accounts, please contact your Registered Estate Coordinator via OPENS.

Joint (JTWROS) to Single

Please refer to the [Documentation Wizard](#) for detailed instructions and documentation requirements for this and other scenarios resulting from death of a party on Joint Accounts.

Name Change for Non-Individuals

Legal Name Change

Documentation Requirements:

- Photocopy of Legal Name Change document/certificate issued by the Province (eg. Certificate of Name Change, Articles of Amendment, etc.); **AND**
- Updated Resolution (CAFN-P2); **AND**
- Updated QI documentation

**Please note – All of these changes require an updated KYC once the change has been made.
For specific submission instructions, please refer to the [Form Library](#).**

Branch Authorization (Required for all Changes included on this form)

<u> X </u>	<u> X </u>	
IA Signature	Branch Manager Approval	Date