

## CHANGE OF ADDRESS

Account Number(s) & Name(s)

### TYPE OF CHANGE

Mail Address Only     Temporary Residence Change \*     Permanent Address change \*

Move Date:

If RESP Account(s) included, update Beneficiaries' Address as well

### NEW & OLD ADDRESS

(Note: If address is a PO Box Number or General Delivery, please also include client's physical location: civic address, legal land description, or Rural Route address)

New Address	Old Address
<input type="text"/>	<input type="text"/>
New Telephone: <input type="text"/>	Old Telephone <input type="text"/>
New E-mail: <input type="text"/>	Old Email: <input type="text"/>

Please provide new identification if you have moved to a new country or provide a signed W-8BEN for each account holder. In the case of a permanent move to the United States, a signed W-9 is required.

Client Signature(s):

Print Name(s):

Date Signed:

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\* A country to country temporary residence change take place when you do not cease residency for tax purposes. This means you will continue to file resident tax returns in your former country of residence. The current withholding tax rate will continue to apply to your account.

\*A country to country permanent residence change take place when you and your immediate family cease residency in your home country for tax purposes. You have declared or will declare a departure/entry date on your emigrant/immigrant tax returns. Please indicate this date as the move date above. If you hold registered and non-registered accounts at Raymond James, we will open new accounts to ensure proper withholding taxes are applied to your non-registered account. Note, you will be subject to non-resident withholding tax on Canadian income after your departure from Canada.

**(For Office Use Only)**

Account Profile update completed by:  Date:

Is the F.A . licensed in the new province/jurisdiction where the client is moving?  Yes  No

**For clients with country to country moves:**

Un-RAP completed      New Client Number for Non-Registered

NRT code for Registered   2  

NRT code for Non-Registered      0= Canadian    1=Treaty    2= RRSP only    3=Non-Treaty

Residence code:

IRS Panel code:        Blanked or     Input New identification

US Person?  No  Yes    If Yes:  Input W-9 or  Input back-up withholding = YES

**For clients leaving Canada:**

Back tax required  No  Yes

If Yes:  Completed      T5-NR4 split required?  Yes  No

Owns Canadian Mutual Funds  No  Yes

If Yes:  Advised client re inability to purchase

Owns Canadian Partnerships  No  Yes

If Yes:  Advised client to sell

Owns RESP?  No  Yes

If Yes:  Advised implications

On DRIP Program  No  Yes

If Yes:  Taken off DRIP

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