

## Tax-Free Savings Account (TFSA) Third Party Declaration

Send the completed form to:

**Manulife Bank of Canada**  
500 King Street North  
Waterloo ON N2J 4C6  
Fax: 1-866-840-6425

- Use this form if you have a Manulife Bank TFSA and someone other than yourself is making a deposit to your account.
- *We, our, us*, the Bank and Manulife Bank refers to Manulife Bank of Canada.
- *You and your* refer to the Account Holder.

### 1 Account Information

TFSA account number

TFSA Account Holder's name (last, first and middle)

### 2 Contribution Details

Under the *Income Tax Act* (Canada), an account must meet a number of conditions to qualify as a TFSA. One condition is that a TFSA must prohibit anyone other than the TFSA Account Holder from making contributions to it. Failure to meet this condition will result in adverse tax consequences; therefore, it is always better for the TFSA Account Holder to make contributions directly from their account. If you choose to allow a third party contribution to your TFSA on your behalf we will permit it if you complete this certification as evidence that the funds belong to you.

The contribution to your TFSA is:

a gift to you from a third party

Name of third party (last, first and middle)

Third party address

City

Province

Postal code

from your employer and has been included in your employment income

Name of employer

Employer address

City

Province

Postal code

### 3 Signature

By signing below, you:

- certify that the contribution made to your TFSA by the third party was received as indicated above, and
- acknowledge the recommendation that it is better to make your contributions directly, but request that Manulife Bank accepts the contribution from the third party to your TFSA.

TFSA Account Holder signature

Date signed (mmm/dd/yyyy)