

RAYMOND JAMES®

Raymond James Ltd. is a
Member of CIPF & IIROC

IA #

Account #

Branch

Account Number(s) & Name(s):

TYPE OF CHANGE:

- Mailing Address Only
 Temporary Residence Change¹
 Permanent Address Change²
 Tick if this is a request to set up **DUPLICATE** confirms and statements³

Move Date² (mm/dd/yy): _____

- If RESP account(s) included, update beneficiaries' address as well

NEW & OLD ADDRESS (INCLUDING PHONE AND EMAIL):

Note: If the new address is a PO Box number or General Delivery address, then also include the client's physical location (civic address, legal land description, or rural route address)

New Address	Old Address

Please provide new identification if you have moved to a new country or provide a signed W8Ben for each account holder. In the case of a permanent move to the United States, a signed W9 is required.

Client Signature(s)

Print Name(s)

Date Signed

_____ (mm/dd/yyyy)

_____ (mm/dd/yyyy)

This document and all related documents, including all notices, are available in the French language. The Client has expressly requested that these documents be in the English language. Ce document et tous les documents qui s'y rattachent, y compris tous les avis, sont disponibles en version française. Le client a expressément demandé que ces documents soient en langue anglaise.



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1. A country to country temporary residence change takes 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.
2. A country to country permanent residence change takes 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.
3. A Duplicate address will only receive statements and/or confirms. It will not receive duplicate tax slips or 3rd party mailings from issuers. Tax slips and 3rd party mailings will only go to the Primary address on the account

Account Profile update completed by: _____ Date: _____
(mm/dd/yyyy)

Is the IA 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? Yes No If Yes: Input W9 or Input back-up withholding = YES

For clients leaving Canada:

Back tax required: Yes No

If yes: Completed T5 – NR4 split required? Yes No

Owns Canadian Mutual Funds Yes No

If yes: Advised client re inability to purchase

Owns Canadian Partnerships Yes No

If yes: Advised client to sell

Owns RESP? Yes No

If yes: Advised implications

On DRIP Program Yes No

If yes: Taken off DRIP