



This form is to be used for a personal account name change only.

Note: A completed New Account Application is required for changes to a non-personal account name, non-personal trading authority name or for personal or non-personal account ownership changes.

List the account numbers that are being updated:

Client name (old):

Last Name First Name

Client name (new):

Last Name First Name

SIN (optional)

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 (Please provide to ensure accuracy for tax reporting purposes)

Please indicate which of the following supporting name change documents have been verified:

- Marriage Certificate
- Divorce Certificate or Separation Agreement
- Name Change Certificate
- Other: (Insert name of document) _____

Please provide supporting name change document information:

Document reference number # (if applicable) _____

Document Effective Date: _____
(mm/dd/yyyy)

If the name change is a result of marriage or common-law union please complete the following:

Full Name of Spouse or Partner Occupation

Employer Type of Business

I authorize TD Direct Investing to change my name as completed above:

Client signature (old): _____

Date: _____ (mm/dd/yyyy)

Client signature (new): _____

Date: _____ (mm/dd/yyyy)

For Branch Use Only

Record new valid identification information below and provide a certified true copy, front and back, with this completed form.

Transit No. _____ Telephone Number _____

Name _____ TD Logon ID _____

Comment(s): _____

Valid Identification/Citizenship Required - For all Partners - Provide copy of one:

(U.S. Persons - W9 form (#515876) and a Waiver of Confidentiality (#591856))

- Valid ID must have the applicant's name, photo, ID Number/Account Number/Reference Number, and must match the client.
- Passport, if provided, must be signed by the applicant to be AML and QI compliant.
- Review birthplace indicated in Passport - if U.S., refer to the FATCA website for further details and procedures
- U.S. Persons must provide: - *W9 form (#515876) and a Waiver of Confidentiality (#591856)*

Valid Photo ID Types (one copy required)

Note: Complete form 533666, Valid Non-Photo ID Types if applicant does not have one of the acceptable Photo ID listed below.

- Passport
- Canadian Driver's License
Restriction: QC only if applicant volunteers it
- Provincial Health Card (with photo)
(Restriction: ON, MB, NS and PEI not allowed by law; QC only if applicant volunteers it)
- Permanent Resident Card
- Nexus Card
- Canadian DND Military Identification Card
- Canadian Provincial Government ID Card
AB, BC, NL, NS, SK, PEI, ON and MB only
- Certificate of Indian Status
- Canadian Firearms Licence

Client _____

Has a TD employee dated and certified true a photocopy of the client ID? Yes No

Was the Affiliate Method Used? Yes No

Affiliate Date of Verification (mm/dd/yyyy) _____

If 'Yes' is selected above, please indicate the date when the Affiliate verified the ID

ACF2 Login ID Name of TD Employee _____ Date ID Certified (mm/dd/yyyy) _____

Type of Identification _____ Identification Number _____

Place of Issue _____ Date of Issue (mm/dd/yyyy) _____ Expiry Date (mm/dd/yyyy) _____