

ING Direct Funds Limited

Direct Transfer of Tax-Free Savings Account

Set up your
TFSA
Direct Transfer to
ING Direct Funds Limited
in **2 easy steps**

Step 1: Complete this Direct Transfer Form to transfer your Tax-Free Savings Account (TFSA) from another financial institution to ING Direct Funds Limited.

Step 2: Mail the completed form to ING Direct Funds Limited or fax it to 416-497-8908 or 1-877-464-7797. If this Transfer is your first deposit into your ING DIRECT TFSA, please remember to include the TFSA Enrollment Form.

For a description of the terms used in this Form, please see reverse.

We will take care of the transfer for you.

Please tell us about yourself

MR. MRS. DR.
 MS. MISS

FIRST NAME		INITIAL	LAST NAME	
Address:				
STREET		CITY	PROVINCE	POSTAL CODE
Telephone:		E-mail:		
Social Insurance Number (MUST BE COMPLETED):			Date of Birth (MUST BE COMPLETED):	
		DAY	MONTH	YEAR

Transfer information (See reverse for description of terms.)

I wish to transfer (Please check appropriate box):

IN CASH ONLY

A) All funds in my existing TFSA

OR

B) \$ _____ from my existing TFSA

from the following institution:

Financial Institution: _____

Address of issuer: _____

Reference/Plan number: _____

Maturity date: _____

(IF APPLICABLE)

Please attach a copy of most recent statement.

Please transfer my TFSA to: ING Direct Funds Limited

103 - 111 Gordon Baker Rd., Toronto, Ontario M2H 3R1

ING Direct Funds Limited TFSA Account Number:

_____ (IF APPLICABLE)

Investment instructions:

Streetwise Balanced Income Fund \$ _____

Streetwise Balanced Fund \$ _____

Streetwise Balanced Growth Fund \$ _____

Client's/Holder's

Signature: X _____

Date: _____

Financial Institution Use Only

This section to be completed by the Transferor (other financial institution).

Amount transferred \$ _____ from TFSA identified above.

Please check if institution requires a copy returned.

Authorized Signature: X _____ Position or Office: _____ Date: _____

This section to be completed by the Transferee (ING Direct Funds Limited) upon receipt of the funds.

We agree to the above for a direct transfer of property in the amount of \$ _____. We have received the property and will credit it to the holder under the Arrangement. No receipt for tax purposes will be issued for the amount transferred.

Authorized Signature: X _____ Position or Office: _____ Date: _____

Please note that this form is used to record a qualifying transfer of a TFSA under subsection 207.01(1) of the Income Tax Act.

Transfer information

- A) If you check this box, you wish to transfer your entire TFSA.** When you transfer in cash, all your investments will be liquidated and converted to cash before they are transferred.
- B) If you check this box, you wish to transfer only a portion of your TFSA.** When you transfer in cash, the investments you specify will be liquidated and converted to cash before they are transferred.

Note: Please attach a copy of your most recent TFSA statement indicating which investments you would like us to transfer.

How much will it cost to transfer my account? – Most institutions charge a Transfer-out fee for which the cost will vary. You should check with the institution you are transferring from to determine what the fees are. ING Direct Funds Limited does not charge any fees to transfer your account.

How long will my transfer take? – Transfers can take anywhere from 2-6 weeks to be completed. The amount of time taken will depend on the institution you are transferring from.

Definitions

Reference/Plan number – The number for the account you wish us to transfer.

Maturity date – The date your investment(s) mature (some don't have a maturity date).

Issuer of Plan – Name of the institution you are transferring from.

Address of issuer – The address of the institution you are transferring from. (This is where this Direct Transfer Form will be sent.)

ING Direct Funds Limited Account Number – If you already have a TFSA with ING Direct Funds Limited that you wish us to deposit the transfer proceeds into, please indicate. Fax or mail your Enrollment Form with your Direct Transfer Form.

Investment instructions – Please indicate into which funds you wish us to invest the transfer proceeds, once they arrive at ING Direct Funds Limited.