



VALUE PARTNERS INVESTMENTS

Value Partners Tax-Free Savings Account Third-Party Declaration Form

Value Partners Tax-Free Savings Account Number: _____

This form is required when contributions or transfers into a Tax-Free Savings Account (TFSA) are made from a third party. As per the *Income Tax Act* (Canada), a TFSA is a qualifying arrangement that must meet several conditions, one of which is that it prohibits anyone other than the holder of the arrangement from making contribution(s) into the TFSA.

Therefore, we are requesting that the declaration below be signed by the TFSA accountholder, certifying that the funds received from the third party were received as a gift. Please note, if any of the TFSA qualifying arrangement conditions are not met, it may result in adverse tax consequences to the accountholder.

"I, _____, certify that the third-party funds that
(TFSA accountholder name)
are about to be transferred into my TFSA account _____ on _____
(TFSA Account #) ()

from _____ was received as a gift.
(enter third-party name(s))

I also certify that I am the beneficial owner of this gifted property that was contributed directly into my TFSA."

Accountholder signature

Date