



**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**

**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 Citizenship Card

Client \_\_\_\_\_

In the event of U.S. indicia on photo identification an appropriate Form W-8 or W-9 is provided.

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) \_\_\_\_\_