



Instructions for updating information on an existing TD e-Series Funds Account.

**Please complete and return the attached Maintenance Form:**

- Please carefully read the instructions on the Maintenance Form and fill in all applicable information. Incomplete instructions may be delayed.
- Be sure that all applicants sign the maintenance form.
- Original signature(s) are required. Unfortunately we are unable to accept faxed Maintenance Forms.
- Please mail the form to:

TD e-Series Funds Administration  
Liberty Centre  
3500 Steeles Avenue East  
Tower 5, Level 2  
Markham, Ontario  
L3R 9Z9

- All changes are subject to approval by TD Investment Services Inc.

**If you need assistance:**

- At any point during this maintenance process simply visit [www.tdcanadatrust.com/mutualfunds/tdeseriesfunds/account.jsp](http://www.tdcanadatrust.com/mutualfunds/tdeseriesfunds/account.jsp) and click on the Contact Us link on the right navigation bar for assistance. You will be offered self help tips for the TD e-Series Funds Account, and other ways to get additional assistance.

**When your account is updated:**

- Once your Account Maintenance has been processed, you will receive confirmation via email.



Applicant Name: \_\_\_\_\_

Joint-Applicant Name: \_\_\_\_\_  
(If applicable)

Account Number: \_\_\_\_\_

**Return to:**  
TD e-Series Funds Administration  
Liberty Centre  
3500 Steeles Avenue East  
Tower 5, Level 2  
Markham, Ontario  
L3R 9Z9

Please fill in only the information you would like us to change on your TD e-Series Funds Account.

**1. Change of Address**

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Country \_\_\_\_\_

Postal Code \_\_\_\_\_ Telephone Home ( ) \_\_\_\_\_ Business ( ) \_\_\_\_\_

E-mail Address \_\_\_\_\_

**Note:** U.S. Residents are prohibited from opening accounts by U.S. Securities Legislation

**2. Change Investor Profile**

**Investment Knowledge**

- Limited
- Average
- Above Average
- Sophisticated

**Portfolio Value**

- Under \$25,000
- \$25,000 - \$49,999
- \$50,000 - \$99,999
- \$100,000 - \$499,999
- \$500,000 - \$999,999
- Over \$1,000,000

**Personal Net Worth**

What are your:

Liquid Assets \$ \_\_\_\_\_

+ Fixed Assets \$ \_\_\_\_\_

= Total Assets \$ \_\_\_\_\_

- Total Liabilities \$ \_\_\_\_\_

= Estimated Personal Net Worth \$ \_\_\_\_\_

**Personal Annual Income**

- Under \$25,000
- \$25,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$125,000
- Over \$125,000

**Age**

\_\_\_\_\_ yrs

Which of the following best describes the type of investments you currently own, or have owned in the past?

- Little or no investments
- Mostly GICs or Term Deposits
- Mostly bonds or income mutual funds
- A mix of money market, bond and equity investments and/or mutual funds
- Mostly stocks and/or equity mutual funds

Employer \_\_\_\_\_ Employment Start Date \_\_\_\_\_ Type of Business \_\_\_\_\_

Employer's Address \_\_\_\_\_ Occupation \_\_\_\_\_

**3. Bank Account Information (A Void cheque must be provided if account is not with TD Canada Trust.)**

Canadian \$ Account Number \_\_\_\_\_ - \_\_\_\_\_

Account Holder's Name(s) \_\_\_\_\_

Financial Institution \_\_\_\_\_ Institution Number \_\_\_\_\_ Branch Transit Number \_\_\_\_\_

Financial Institution Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

US \$ Account Number \_\_\_\_\_ - \_\_\_\_\_

Account Holder's Name(s) \_\_\_\_\_

Financial Institution \_\_\_\_\_ Institution Number \_\_\_\_\_ Branch Transit Number \_\_\_\_\_

Financial Institution Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

## 4. Signature(s)

Please accept this form as my/our authorization to make the above specified changes to my/our TD e-Series Funds Account.

Date 

Day	Month	Year

 Signature of Applicant \_\_\_\_\_

Date 

Day	Month	Year

 Signature of Joint Applicant (if applicable) \_\_\_\_\_

### Branch Use Only

Branch No. **2378**

Mutual Funds Representative Signature \_\_\_\_\_ Rep. Code 

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Branch Manager Signature \_\_\_\_\_ Date: \_\_\_\_\_ Branch Manager Rep. Code 

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Branch Telephone # \_\_\_\_\_