EPA ELIGIBLE TRANSACTIONS

Documents for client name account transactions NOT required when....

Purchases on the following account types:

- Investment (Individual, ITF, Joint)
- RRSP (Individual and Spousal)
- TFSA

Redemptions under $25,000 gross on the following account types:

- Investment (Individual, ITF, Joint)
- RRSP (Individual and Spousal)
- TFSA

Switches on the following account types:

- All

Transfers on the following transaction types:

- ICT – sell side

Application Forms:

- Not required on RRSP and TFSAs when an EPA eligible purchase is made

*This is only a guide. Please consult Fundserv or your head office for specific details.

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