

Appendix A: Settlor(s) Disclosure Form

Name:	
Address:	
Date of Birth:	
Jurisdiction of Residence:	
Taxpayer Identification Number:	

Name:	
Address:	
Date of Birth:	
Jurisdiction of Residence:	
Taxpayer Identification Number:	

This document is for general information only and is not intended to be a summary of the technical provisions of the Income Tax Act. You should always contact your trusted advisor for specific guidance pertaining to your individual tax needs. This publication is not a substitute for obtaining personalized advice.



Appendix B: Trustee(s) Disclosure Form

Name:	
Address:	
Date of Birth:	
Jurisdiction of Residence:	
Taxpayer Identification Number:	

Name:	
Address:	
Date of Birth:	
Jurisdiction of Residence:	
Taxpayer Identification Number:	

Name:	
Address:	
Date of Birth:	
Jurisdiction of Residence:	
Taxpayer Identification Number:	

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Appendix C: Beneficiaries Disclosure Form

Name:	
Address:	
Date of Birth:	
Jurisdiction of Residence:	
Taxpayer Identification Number:	

Name:	
Address:	
Date of Birth:	
Jurisdiction of Residence:	
Taxpayer Identification Number:	

Name:	
Address:	
Date of Birth:	
Jurisdiction of Residence:	
Taxpayer Identification Number:	

Name:	
Address:	
Date of Birth:	
Jurisdiction of Residence:	
Taxpayer Identification Number:	

Name:	
Address:	
Date of Birth:	
Jurisdiction of Residence:	
Taxpayer Identification Number:	

Name:	
Address:	
Date of Birth:	
Jurisdiction of Residence:	
Taxpayer Identification Number:	

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