Duplicate Tax Slip/Tax Information Request

Please provide to my accountant, namely:

Accountant Name: ________________________

Accountant Fax: ________________________

The following duplicates:

- ☐ T3
- ☐ T5
- ☐ T5008
- ☐ T4RIF
- ☐ T4A
- ☐ T4RSP
- ☐ Year End Statement
- ☐ T5013A
- ☐ Fee Letter
- ☐ T3
- ☐ Gain/Loss Summary
- ☐ Other: ________________________

From which company:

- ☐ Dynamic (DYN)
- ☐ Mackenzie (MFC)
- ☐ CI Funds (CIG)
- ☐ Next Edge (NEC)
- ☐ Connor Clark & Lunn (CCL)
- ☐ Kensington (KEN)
- ☐ Other: ________________________

For which accounts:

____________________ ____________________ ____________________

____________________ ____________________ ____________________

____________________ ____________________ ____________________

Please note that, unless **specific** instructions are received, we will be unable to complete the request, as mutual fund companies report to CRA, and copies are not provided to us. A request for "all information" or "all accounts" will not be acted upon. Instructions given without a specific fund company in conjunction with a slip request will not be acted upon.

All requests are performed after trading hours (2:00 p.m.), and are subject to a 48 hour turnaround period.

All requests must be received via fax at 306-975-9503.

No tax slips with Social Insurance Numbers will be emailed, as this is not considered a secure form of communication. Please be sure to provide a fax number. Alternatively, the duplicates may be picked up in person by the client or via courier.

Client Name: ____

Client Authorization Signature: ________________________________

Co-Account Holder Signature: ________________________________