

1 Account Holder information:

Account Holder Name	Account #	IA Code	Branch

2 Currency
☐ \$CAD 
☐ \$USD* 
**Not available for IGEs*
3 Internal Recurring Events:

From RJ Account #:

Credit Account #:

For TFSA: Please review your clients TFSA yearly contribution.

Reason for recurring events:

4 Electronic Transfer Options:

(Funds electronically transferred to client bank account and Internal Recurring to RJ Account)

☐ Income Earned ☐ Fixed Amount (specify):

☐ Monthly (on preferred date)

☐ Weekly

☐ Bi-Weekly

☐ Quarterly

☐ Semi-Monthly (on preferred dates)

☐ 15th

☐ *Other

*Specify if Other

Start Date

☐ Mid & Last Day

*Specify if Other

☐ Month-End

☐ *Other

Stop Date (YYYY-MM-DD):

5 Please select and attach one of the following:

The noted Financial Institution is hereby authorized to pay and debit the account of the undersigned.

☐ Attached is a VOID cheque. (Over the counter/non-personalized cheque(s) will not be accepted)

☐ Attached is a bank information form. A bank employee has completed the form and branch stamped the document. This is to verify that I the undersigned has ownership of the bank account.

6 Signature(s)

I hereby authorize Raymond James Ltd to debit my investment account at Raymond James Ltd on the schedule indicated by me above.

Date (YYYY-MM-DD)

Client Signature(s)



Date (YYYY-MM-DD)

Client Signature(s)



Please note:

-Clients banking in rural locations may experience time delays in Automatic Funds Transfer. Time delays should not exceed five business days.

-Income Generated EFT: If a client's RJL account has a debit balance, the client's monthly payments will not be processed.

-Setting up Fixed/Income Earn option will also allow your Investment Advisor to perform one-time transfers to your bank account at your request.

Date (YYYY-MM-DD)

Investment Advisor Signature(s)



This document and all related documents, including all notices, are available in the French language. The Client has expressly requested that these documents be in the English language.

Ce document et tous les documents qui s'y rattachent, y compris tous les avis, sont disponibles en version française. Le client a expressément demandé que ces documents soient en langue anglaise.

 This form may be emailed by the branch to: recurringevents.nonmutualfund@raymondjames.ca or faxed to: 604-654-1274

Raymond James Ltd requires this information to set up and perform automatic electronic debit or credit money transfers.


1 Bank Information Form

Bank Information to be completed by the Financial Institution

Bank Institution Number:	
Bank Transit Number:	
Bank Account Number:	
Account Currency:	<input type="checkbox"/> \$CAD <input type="checkbox"/> \$USD

2 Financial Institution Branch Stamp:

I hereby confirm the banking information indicated on this form is correct and that our client _____ has ownership of this bank account.
(First and Last Name)

Bank Employee Name	
Title	
Bank Employee Signature	Date (YYYY-MM-DD)
	

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