

Estate Requirements

Registered Plans with Beneficiary Designated by Bank Form (including TFSA)	Registered Plans Under \$100,000.00 Beneficiary Not Designated by Bank Form (including TFSA)	Registered Plans Over \$100,000.00 Beneficiary Not Designated by Bank Form (including TFSA)
<ul style="list-style-type: none"> • Notarized copy of the Will • Certified true copy of Death Certificate • Sworn Scotiabank Declaration of Transmission and Indemnity without Court Documents* • Completed RIF/RSP/TFSA Application (if beneficiary is spouse)/or • Transfer Authorization 	<ul style="list-style-type: none"> • Notarized copy of the Will • Certified true copy of Death Certificate • Sworn Scotiabank Declaration of Transmission and Indemnity without Court Documents* • Completed RIF/RSP/TFSA Application (if beneficiary is spouse)/or • Transfer Authorization 	<ul style="list-style-type: none"> • Scotiabank Declaration of Transmission and Indemnity with Court Documents • Notarized copy of Certificate of Appointment of Estate Trustee with or without a Will • Completed RIF/RSP/TFSA Application (if beneficiary is spouse)/or • Transfer Authorization

The Scotiabank Declaration of Transmission and Indemnity **without Court Documents does not need to be “sworn” if assets are under \$25,000.00.*

Note: ADS should be advised as soon as possible upon the death of the annuitant.