



TYPE OF CHANGE

- Mailing & Residential Mailing Address Only Residential Address Only
 Duplicate Statements & Confirms If RESP accounts included, update beneficiaries' addresses

Address Change Effective Date: _____

NEW & OLD ADDRESS (Including Phone and Email)

Note: If the new address is a PO Box number or General Delivery address, then also include the client's physical location (civic address, legal land description, or rural route address)

Old Address	New Address
Phone Number:	Phone Number:
Email:	Email:

FOR YOUR NEW ADDRESS¹ (Please complete all of the sections that may apply)

<input type="checkbox"/> I am a tax resident of Canada.	If you ticked this box, please provide the following:		
	• Canadian ID or W8BEN	<input type="checkbox"/>	Required unless you are a US citizen
	• <i>Date of entry into Canada</i>	/ /	Only required if you are becoming a Canadian resident
	• <i>Renunciation documents²</i>	<input type="checkbox"/>	Only required if you are departing the United States
<input type="checkbox"/> I am a citizen or a tax resident of the United States.	If you ticked this box, please provide the following:		
	• W9	<input type="checkbox"/>	
	• NR301	<input type="checkbox"/>	Only required if you reside outside of Canada
	• RC51	<input type="checkbox"/>	Only required if you reside outside of Canada and the United States
	• <i>Date you became non-resident</i>	/ /	Only required if you are departing Canada
	• <i>Date of entry into Canada or the United States</i>	/ /	Only required if you are becoming a resident of Canada or the US
<input type="checkbox"/> I am a tax resident of a jurisdiction other than Canada or the United States.	If you ticked this box, please provide the following:		
	• RC518	<input type="checkbox"/>	
	• ID issued from the jurisdiction, or W8BEN	<input type="checkbox"/>	Required, unless you are a US citizen
	• NR301	<input type="checkbox"/>	Required, unless the jurisdiction has no treaty with Canada
	• <i>Date you became non-resident</i>	/ /	Only required if you are departing Canada
	• <i>Renunciation documents</i>	<input type="checkbox"/>	Only required if you are departing the United States
<input type="checkbox"/> I am temporarily residing in the United States.	If you ticked this box and you will be filing US taxes, please provide the following:		
	• W9	<input type="checkbox"/>	• NR301 <input type="checkbox"/>
	If you ticked this box and will not be filing US taxes, please provide the following:		
	• ID	<input type="checkbox"/>	• Snowbird/Temporary US Residence Declaration Form <input type="checkbox"/>
	• W8BEN	<input type="checkbox"/>	
	<i>Explanation of tax situation in the form of email or letter from the client or tax advisor</i>	<input type="checkbox"/>	Only required if you are not a Snowbird

Applicant's Signature _____ Date (yyyy/mm/dd) _____ Co-Applicant's Signature _____ Date (yyyy/mm/dd) _____

¹ Raymond James may be required to open new accounts in order to ensure proper withholding taxes are applied.

² A client who is no longer a US person must provide proof of renunciation of US citizenship/Green Card/Permanent Resident in order to change the his or her status. This could either be a Certificate of Loss of Nationality, a Form I-407, or a Sailing Permit.