Account Opening Checklist for Institutional Clients

Please find below the account opening information for the institutional clients that is usually requested

For All Accounts

- ☐ Know Your Client Form
- ☐ Valid Government Identification (Birth Certificate, Driver's License, Passport) for the authorized signatories
- ☐ Investment Management Agreement (including Investment Policy Statement)
- ☐ Information regarding details of Custodian
- ☐ Authorization of Transfer

Pension Funds and Pension Plans

- ☐ Federal Trust Identification Number

Corporate Accounts

- ☐ Articles of Incorporation
- ☐ Corporate Resolution (to open the account)
- ☐ Certificate of Authorized Signing Officers
- ☐ Canada Revenue Registration Number

Non-Taxable Accounts

- ☐ Federal Business Identification Number

Foundations

- ☐ Federal Trust Identification Number
- ☐ Federal Business Identification Number

1555 Peel Street, Suite 1200
Montreal, Quebec H3A 3L8
T 514 906-0667