



Name Change / Cancel and Combine Accounts (C&C)

Submission Email:

UFA Support Office:

Customer Support: 1-877-258-4500

ATTN: MDM Department

Suite 700, 4838 Richard Rd SW Calgary, AB, T3E 6L1

- The application process may take up to four weeks to complete.
- All applications must be signed by the original account owner(s).
- If there is an active investment loan on the account, changes must wait until the loan program comes to a close.
- The "Cancel and Combine" process cannot be completed until the credit account being transferred from has a balance of \$0.

Existing Account Name:

Account Number:

Type of Request (select one):

Name Change

Cancel & Combine (C&C): Combine Two Existing Accounts

Will this request change the account ownership?

Note, an Individual and a Registered Business represent two separate legal entities, regardless of business ownership.

Name changes due to death require a new account. No name change or account combine can be completed.

No – Same ownership, duplicate account. No additional information required.

Yes- Ownership will change with completion of request. See Requirements.

Requirement (Please include with submission application):

A Sales Agreement, Legal letter of Account/Equity Transfer, Government Registry Amalgamation and/or any other documentation UFA deems necessary is required. If you are unable to provide this supporting documentation, we will not be able to proceed. A new account will need to be created or the existing account will need to be closed.

For Name Changes Only:

New Account Name Requested:

For Combining Accounts Only (Existing account listed above to be closed into this account):

Account Name:

Account Number:

As a co-operative, UFA is required by the Canada Revenue Agency (CRA) to print one Social Insurance Number (SIN) and/or Business number on any tax slips that are issued to you.

Members Date of Birth:
MM/DD/YYYY

/ /

S.I.N. #

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Mailing Address:

City:

Prov:

Postal
Code:

Phone #:

Email:

Business Phone #:

Request Date:
MM/DD/YYYY

Type or Print Name (Account Holder):

Account Holder Digital Signature or Manual

Type or Print Name (Second Account Holder if Applicable):

Second Account Holder Digital Signature or Manual

Please note if forms are not signed or digitally signed they cannot be processed