



Use this form to update the information Newhaven Asset Management Inc. keeps on file for your account(s). Complete Section 1, check the item(s) you are updating in Section 2, provide the new details in Section 3, and sign in Section 4. For beneficiary changes, please use the separate Beneficiary Designation form.

1. Account Holder Information

FULL LEGAL NAME

ACCOUNT NUMBER(S)

DATE OF REQUEST

2. What Would You Like to Update?

☐ Mailing Address☐ Email Address☐ Phone Number☐ Legal Name☐ Employment Information☐ Banking / Pre-Authorized (EFT) Details☐ Other (specify in Section 3)

3. New Information

STREET ADDRESS

CITY

PROVINCE

POSTAL CODE

EMAIL ADDRESS

PHONE NUMBER

EMPLOYER NAME

OCCUPATION



Banking details below are used only for pre-authorized contributions/withdrawals you have set up on your account.

3. New Information (continued)

BANK / INSTITUTION NAME

INSTITUTION NUMBER

TRANSIT NUMBER

ACCOUNT NUMBER

OTHER / ADDITIONAL DETAILS

Please attach a void cheque or pre-authorized debit form from your financial institution if you are updating banking details for a pre-authorized contribution or withdrawal plan.

4. Authorization

I confirm that the information provided on this form is accurate and authorize Newhaven Asset Management Inc. to update my account records accordingly.

PRINTED NAME

DATE

SIGNATURE