

My Maxa membership number is _____

Primary Member Name _____

Joint Member Name (if applicable) _____

Maxa Member Share - \$5.00 (**required for each NEW membership**)

Please send a personalized cheque made payable to Maxa Financial. MAXA cannot accept cash.

Money Laundering Compliance Questionnaire (Complete questions for all Term Deposits and TFSA accounts)

Third Party Account Details:

Will this new sub-account under this Membership be used by and for the benefit of someone other than the named Applicant(s)/Member(s)?

No Yes If answer is Yes, MAXA Financial will be contacting you for additional information.

Politically Exposed Foreign Person Account Details:

Will any accounts under this Membership be used by a Politically Exposed Foreign Person (PEFP), Politically Exposed Domestic Person (PEDP) or Heads of International Organizations (HIO), their family member or a close associates? For definitions please review the Membership application.

PEFP NO YES If answer is Yes, MAXA Financial will be contacting you for additional information.

PEDP NO YES If answer is Yes, MAXA Financial will be contacting you for additional information.

HIO NO YES If answer is Yes, MAXA Financial will be contacting you for additional information.

Intended use of account: _____

Purpose and Intended Nature of the Business Relationship: _____

***The following investments are not eligible for any patronage allocations which may be declared by Westoba Credit Union Ltd.

Savings

Maxa Savings \$ _____

Maxa Term Deposit

Investment Amount \$ _____ Rate _____ Term in Years (1-7) _____

Interest Option: Compounding Annual Interest Term Number _____

Funds from: Enclosed Cheque Transfer from Maxa Savings

TFSA Contract # _____

TFSA Variable Savings \$ _____

TFSA Term Deposit

Investment Amount \$ _____ Rate _____ Term in Years (1-7) _____

Interest Option: Compounding Annual Interest Term Number _____

Funds from: Enclosed Cheque; Transfer from Maxa Savings TFSA Variable Savings

RRSP Contract # _____

My RRSP application has been signed and contract opened on my MAXA membership.

I am the owner and the contributor of this RRSP and will claim it as a deduction

My spouse is the Contributor of this RRSP and will claim it as a deduction, but I am the owner.

RRSP Variable Savings \$ _____

RRSP Term Deposit

Investment Amount \$ _____ Rate _____ Term in Years (1-7) _____

Interest Option: Compounding Annual Interest Term Number _____

Funds from: Enclosed Cheque; Transfer from Maxa Savings RRSP Variable Savings

Date: _____ Member(s) Signature _____