

40 King St. West, 15<sup>th</sup> Floor  
Scotia Plaza, P.O. Box 402  
Toronto, On M5H 3Y2  
1-800-387-9273, 416-863-7777  
[www.advisors.scotiamcleod.com/spiessmcglade](http://www.advisors.scotiamcleod.com/spiessmcglade)



Dear Client,

Thank you for contacting us about your change of address. To complete this change for you, and to ensure the security and appropriate investment of your account, we require your new address, signature, and the information on the attached document to be updated.

The form is also online at: <http://www.managedmoneyreporter.ca/forms/MKYC-S.pdf>

Please mail the completed form back to:

Christina Calvert  
ScotiaMcLeod 40 King St. W., 15th Floor Toronto ON M5H 3Y2.

We apologize for this additional paperwork, which we know is more than is required at the local phone or cable company. However, we also have a significant duty to protect and monitor your investments.

An address change is usually also a time in life where there are changes to your family status, income, employment, debt or investment needs. We would be pleased to discuss how those changes may also affect your financial goals and the investments you hold with us, based on your information on the attached form.

We realize that a move is a very busy time, and look forward to being in contact at your convenience. If you have any questions on this matter, or need help completing the form, please contact your investment team at 416-863-7777 or 1-800-387-9273.

Thank you for letting us help with your investments, and again, we wish you all the best for your move.

Sincerely,

Carl Spiess, CFP, CIM, FMA, FCSI, MBA  
Director, Wealth Management

Allan McGlade, CFP, CIM, CLU,  
Senior Wealth Advisor