

Tax Measures for International Financial Centres (IFC)
International financial transactions

Financial engineering services

From: To:
yyyy/mm/dd yyyy/mm/dd
Specific taxation year or part
thereof

IFC qualification
certificate number

A) ☐ Check this box if the IFC has provided financial engineering services.

① The term "financial engineering services" refers to the development of a new financial product or the design of a tailor-made financial product, carried out on behalf of a third party.

B) Indicate on whose behalf these services were rendered:

☐ an individual not residing in Canada

☐ an individual residing in Canada, in respect of funds established for the purpose of being subject at 90% or more to foreign exposure

C) Information on clients and financial products developed or designed by the IFC:

Name of the client	
Location (city and country)	
Description of financial products developed or designed for the client	
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If necessary, attach an annex to this form.