

Direct Transfer-in

Part I - Annuitant/Holder Request

(name) _____ (social insurance number) _____ (phone number) _____

(address) _____

PLEASE TRANSFER: all the property OR lump sum of \$ _____ in cash OR in kind

FROM: RRSP Spousal RRSP LIRA/Locked-in RRSP RLSP RPP DPSP Retiring Allowance
 RRIF Spousal RRIF LIF LRIF Prescribed RRIF RLIF TFSA

(transferor institution name) _____

(transferor institution address and phone number) _____

(contract or plan number) _____ (deposit number) _____ (maturity date, if applicable dd/mmm/yyyy) _____

TO: RRSP Spousal RRSP LIRA/Locked-in RRSP RLSP TFSA
 RRIF Spousal RRIF LIF LRIF Prescribed RRIF RLIF

_____ at _____
 (contract number) (receiving institution name)

_____ (receiving institution address and phone number)

Enter specimen plan: _____
 (Trustee: Concentra Trust) (specimen plan name and number)

If from RPP/DPSP: I am the member OR the beneficiary spouse* OR former spouse* due to breakdown of marriage or common-law partnership
 * or other individual who has been given similar rights under applicable legislation

**Where I have requested a transfer in cash, I authorize the liquidation of all or part of my investments.
 I agree to pay any applicable fees, charges or adjustments.**

Date
 (dd/mmm/yyyy)

Signature of Annuitant/Holder
 OR see attached letter

Signature Guaranteed
 (authorized transferee signature)

Part II - Transferor Institution (Return the completed form with cheque and any attachments.)

Amount transferred: \$ _____ (transferor to issue T4RIF for transfers from RRIF to RRSP or T4 for retiring allowance transfer)

Spousal contributions: No Yes Contributor name: _____ SIN: _____

Locked-in funds: No Yes (if yes, complete pension information below)

Retiring Allowance: Amount to be reported in Box 66 (eligible retiring allowances) of the employee's T4 slip. \$ _____

From RRIF: The transfer is from a Qualifying Pre-1993 RRIF. No Yes

From RPP: We did not transfer \$ _____ of the amount in accordance with subsections 147.3(1) to (8) and we will report this amount as income of the applicant on a T4A slip.

Complete if Amounts are Locked-in Under Pension Legislation:

Locked-in pension amount \$ _____

Pension Jurisdiction (provincial or federal act): _____

Have funds been held in a LIF/LRIF/RLIF/LITB Account at any time during year of transfer? No Yes

If transfer to:

AB or BC LIF: What is the annual maximum payment for the year (LIF/LITB Account to LIF)? \$ _____
 What amount of the annual maximum has been received by the annuitant (LIF/LITB Account to LIF)? \$ _____

MB LIF: What is the annual maximum payment for the year (LIF/VBA to LIF)? \$ _____
 What amount of the annual maximum has been received by the annuitant (LIF/VBA to LIF)? \$ _____

MB LIRA/LIF: The annuitant has OR has not made a one-time transfer with our organization or that we are aware of.

NL LIF: What amount has been paid to annuitant in year of transfer (LIF/LRIF to LIF)? \$ _____
 If amount paid includes temporary income, specify amount: \$ _____

NL LRIF: What is income earned on LIF transferred amounts during year prior to year of transfer? \$ _____

ON Schedule 1.1 LIF: What is income earned on Schedule 1 LIF, Schedule 1.1 LIF or LRIF transferred amounts during year of transfer? \$ _____

Additional Information:

- Name of employer: _____
- Original RPP name: _____
- Retirement age specified under RPP: _____ (normal) _____ (early)
- Annuity rate breakdown: _____ (unisex) \$ _____ (sex distinct)

 (date dd/mmm/yyyy)

 (authorized signature of transferor institution)

 (contact phone number)