

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) (credit union/caisse populaire name)

(credit union/caisse populaire address and phone number)

Check applicable specimen plan: ☐ Credit Union Retirement Savings Plan RSP 0145-658

(Trustee: Concentra Trust) ☐ Credit Union Retirement Income Fund RIF 0988

☐ Credit Union Tax-Free Savings Account TFSA 0145-_____

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 Signature of Annuitant/Holder Signature Guaranteed

(dd/mmm/yyyy) OR ☐ see attached letter (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)