

**APPLICATION TO TRANSFER PENSION
BENEFIT CREDIT**

Account Number

s1. Applicant

I, _____, am a (member)(survivor of a member (_____)
(INSERT NAME) (GIVE NAME OF THE MEMBER)
of the registered pension plan known as _____ and I apply to

2. Transfer or Purchase (check one)

- (a) transfer my pension benefit credit to a locked-in registered retirement savings plan of the kind described in section 20 of the *Pension Benefits Standards Regulations, 1985*;
- (b) transfer my pension benefit credit to a life income fund of the kind described in section 20.1 of the *Pension Benefits Standards Regulations, 1985*;
- (c) transfer my pension benefit credit to a restricted life income fund of the kind described in section 20.3 of the *Pension Benefits Standards Regulations, 1985*;
- (d) use my pension benefit credit to purchase an immediate life annuity of the kind described in section 21 of the *Pension Benefits Standards Regulations, 1985*;
- (e) use my pension benefit credit to purchase a deferred life annuity of the kind described in section 21 of the *Pension Benefits Standards Regulations, 1985*; or
- (f) transfer my pension benefit credit to a pension plan of which I am currently a member, which is known as _____

3. Signatures

_____	_____
<small>SIGNATURE OF MEMBER (OR SURVIVOR OF MEMBER)</small>	<small>NAME OF MEMBER (OR SURVIVOR OF MEMBER)</small>
_____	_____
<small>SIGNATURE OF WITNESS</small>	<small>NAME OF WITNESS</small>

<small>ADDRESS OF WITNESS</small>	

Signed at _____ on the _____ day of _____, 20_____.

4. Confirmation of the request received by the financial institution for (check one)

- (a) a transfer of the funds to a locked-in registered retirement savings plan of the kind described in section 20 of the *Pension Benefits Standards Regulations, 1985*;
- (b) a transfer of the funds to a life income fund of the kind described in section 20.1 of the *Pension Benefits Standards Regulations, 1985*;
- (c) a transfer of the funds to a restricted life income fund of the kind described in section 20.3 of the *Pension Benefits Standards Regulations, 1985*;
- (d) the use of the funds to purchase an immediate life annuity of the kind described in section 21 of the *Pension Benefits Standards Regulations, 1985*, the funds of which shall be only used to purchase another immediate life annuity that meets the requirements of those Regulations; or
- (e) the use of the funds to purchase a deferred life annuity of the kind described in section 21 of the *Pension Benefits Standards Regulations, 1985*.

5. Signatures

_____	_____
<small>SIGNATURE OF APPLICANT</small>	<small>NAME OF APPLICANT</small>
_____	_____
<small>SIGNATURE OF OFFICER OF FINANCIAL INSTITUTION</small>	<small>NAME OF FINANCIAL INSTITUTION</small>

Signed at _____ on the _____ day of _____, 20_____.

Scotia iTRADE® (Order-Execution Only Accounts) is a division of Scotia Capital Inc. ("SCI"). SCI is a member of the Investment Industry Regulatory Organization of Canada and the Canadian Investor Protection Fund. Scotia iTRADE does not provide investment advice or recommendations and investors are responsible for their own investment decisions.
*Registered trademark of The Bank of Nova Scotia. Used under license.