

APPLICATION TO TRANSFER PENSION BENEFIT CREDIT

| |
|----------------|
| Account Number |
|----------------|

1. 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

| | |
|---|--|
| SIGNATURE OF MEMBER (OR SURVIVOR OF MEMBER) | NAME OF MEMBER (OR SURVIVOR OF MEMBER) |
| SIGNATURE OF WITNESS | NAME OF WITNESS |
| ADDRESS OF WITNESS | |

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

| | |
|---|-------------------------------|
| SIGNATURE OF APPLICANT | NAME OF APPLICANT |
| SIGNATURE OF OFFICER OF FINANCIAL INSTITUTION | NAME OF FINANCIAL INSTITUTION |

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