

# Transfer Authorization for Registered Investments

(RRSP, LIRA, LRSP, RIF, LRIF, LIF, RLIF, RLSP, PRIF, TFSA)

- This form can be used for transferring the registered plans listed above **except** (1) RIF to RSP transfers, (2) transfers due to death and (3) transfers due to marital breakdowns.
- Data entered on this form may be scanned and stored electronically. Please print neatly to ensure completeness, accuracy and machine-readability.

**A: Client Identification**

Account/Policy Holder Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Initial(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Prov. \_\_\_\_\_ Postal Code \_\_\_\_\_

Social Insurance Number \_\_\_\_\_ Home Telephone Number \_\_\_\_\_ Business Telephone Number \_\_\_\_\_

**B: Receiving Institution Information**

Receiving Institution Name Canadian Conference of the Mennonite Brethren Church of North America Contact Name \_\_\_\_\_

Address 1310 Taylor Avenue

City Winnipeg Prov. MB Postal Code R3M 3Z6

Telephone Number 204 669 - 6575 Fax Number 204 654 - 1865 Client Account/Policy Number \_\_\_\_\_

**Registered Type:**

- RRSP    Spousal RRSP    LIRA    LRIF    PRIF    RLIF  
 RRIF    Spousal RRIF    LRSP    LIF    RLSP    TFSA

**Locked-In Confirmation:** Canadian Conference of the Mennonite Brethren Church of North America, as agents for Canadian Western Trust, acknowledge that all locked-in funds from the registered plan noted in the Client Direction to the Relinquishing Institution section below will be transferred to the registered plan type noted and will continue to be administered in accordance with the governing pension legislation or contractual conditional of \_\_\_\_\_ (Province or Territory; if applicable,  old  new). Any subsequent transfer of these locked-in funds to another trustee or financial institution will be made only to another registered plan, which must continue to be administered in accordance with legislation of the jurisdiction noted above. No transfer of locked-in funds will be permitted unless the receiving plan is appropriately registered and in compliance with the applicable pension legislation, regulations and the Income Tax Act (Canada). Canadian Conference of the Mennonite Brethren Church of North America appears on the Superintendent's List of Financial Institutions authorized to administer funds in the jurisdiction noted above (if applicable).

Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_

**C: Client Direction To Relinquishing Institution**

Relinquishing Institution Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Prov. \_\_\_\_\_ Postal Code \_\_\_\_\_

Group Plan Number (if applicable) \_\_\_\_\_ Client Account/Policy Number \_\_\_\_\_

**Transfer: (check one box only for asset transfer instructions)**

- All in cash    The lump sum of \$ \_\_\_\_\_, which represents part of the property of my account identified above, in cash.

**D: Client Authorization**

I hereby request the transfer of my account as described above. Irrevocable Beneficiary: I consent to the transfer of the account.

Signature of Account Holder \_\_\_\_\_ Date \_\_\_\_\_ Signature of Irrevocable Beneficiary (if applicable) \_\_\_\_\_ Date \_\_\_\_\_

**E: For Use By Relinquishing Institution Only**

Registered Type:  RRSP    LIRA    LRSP    RRIF    Qualified    Non-qualified  
 PRIF    RLIF    RLSP    TFSA    LRIF    LIF    Federal LIF    Old LIF    New LIF

Spousal Plan:  No    Yes   If yes: Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Initial \_\_\_\_\_ Social Insurance Number \_\_\_\_\_

If spousal waiver/consent form attached, check here .

**Locked In:**

- No    Yes   Locked-in funds: \$ \_\_\_\_\_  
If yes, locked-in confirmation attached    Governing legislation: \_\_\_\_\_

**If RRIF property is transferred to another RRIF, we have paid or will pay the annuitant the minimum amount for the year.**

Contact Name \_\_\_\_\_ Telephone Number \_\_\_\_\_ Fax Number \_\_\_\_\_  
\_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_