

Application for direct transfer of assets

Instructions for annuitant/owner (The term “annuitant” means the person who is entitled to receive payments from the p

4 Locked-in confirmation

Sun Life Financial acknowledges that these assets to be transferred may be subject to restrictions regarding locked-in or non-registered funds, and confirms that the funds will continue to be administered in accordance with the applicable legislation.

5 Certification by relinquishing institution

Return the completed form along with a cheque for deposit into the owner's account.

I confirm that \$ _____ is transferred as directed in section 2.

Transferred assets must be sent in cash (not in kind).

Locked in amount \$	Pension jurisdiction	Pre amount \$	Post amount \$
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Do not issue a T4RSP, T4RIF or T4A for the amount transferred.

If the transfer is from a RRSP, complete the following:

Has the annuitant's spouse ever contributed amounts to the RRSP? ... No ... Yes, please provide:

Spouse's first name	Last name	Social insurance number
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If the transfer is from a RRIF, complete the following:

Note: A RRIF carrier that makes a direct transfer under subsection 146.3(14.1) or paragraph 146.3(2)(e) has to pay the annuitant the minimum amount for the year.

Is the transfer from a qualifying RRIF? ... Yes ... No

Does the RRIF include amounts transferred from an RRSP to which the annuitant's spouse or common-law partner has contributed? ... Yes ... No

I certify that the information in this section is true, correct and complete.

Name of institution	
Signature of authorized person X	Date (dd-mm-yyyy) - -

6 Allocation instructions for transferred assets

- ... Deposit to the same funds used allocation of contributions under the above plan, or
- ... Deposit as indicated below:

Indicate the fund names and percentages for deposit of this transfer. If no direction is provided, the transfer will be deposited according to the direction used for allocation of contributions under the plan with Sun Life Financial.

Fund name(s)	Percentage
	%
	%
	%
Total 100%	
Signature of annuitant/owner X	Date (dd-mm-yyyy) - -

Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.