

**DIRECT TRANSFER UNDER SUBSECTION 146.3(14.1) OR PARAGRAPH 146(16)(a) OR 146.3(2)(e)**

You can use this form to record a direct transfer. Please print, and check the boxes that apply to you. See the back of this form for instructions and definitions. Legislative references on this form are from the *Income Tax Act*.

**Area I – Annuitant**

Last name	First name and initials	Social insurance number
Address		Telephone

**Part A – Transfer from an RRSP or a RRIF**

I am the annuitant under the registered retirement savings plan (RRSP). Individual plan number, and name \_\_\_\_\_

I am the annuitant under the registered retirement income fund (RRIF). Individual fund number, and name \_\_\_\_\_

Name of RRSP issuer or RRIF carrier	Address
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**Part B – Description of amount to be transferred**

Please transfer all  of the property,  the lump sum of \$ \_\_\_\_\_, or  payments of \$ \_\_\_\_\_, which represents all or part of the property of my unmatured RRSP identified in Part A,  in cash or  in kind.

Except for enough property to pay me the minimum amount this year, please transfer all  of the property or  the lump sum of \$ \_\_\_\_\_, which represents part of the property of my RRIF identified in Part A,  in cash or  in kind.

**Part C – Identifying the RRSP, RRIF, or RPP the funds are being transferred to**

Please transfer the above-mentioned RRSP property to my RRSP. Individual plan number, and name \_\_\_\_\_

Please transfer the above-mentioned RRSP or RRIF property to my RRIF. Individual fund number, and name \_\_\_\_\_

Please ensure that the transfer of the above-mentioned RRSP or RRIF property is credited to my account as a member of this registered pension plan (RPP). CRA registration number, and name \_\_\_\_\_

Name of RRSP issuer, RRIF carrier, or RPP administrator	Address
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Date	Annuitant's signature	or <input type="checkbox"/> See letter attached
2008/06/27		

**Area II – Transferee**

1. We agree to the above request for a direct transfer of property. When we receive the property, we will credit it to the annuitant or member under the plan or fund identified in Part C of Area I. If the plan or fund is an RRSP or a RRIF that conforms to a specimen plan or fund, it will conform with the specimen identified as:

\_\_\_\_\_ We will check the plan or fund identification in Part C of Area I, and add or correct information as necessary.

Specimen plan or fund number, and name

2. The plan or fund is registered under the *Income Tax Act* or, if the plan or fund is not registered, we will apply for such registration according to Information Circulars 72-22 and 78-18.

Transferee's name	Date
Authorized person's signature	Position or office

**Area III – Transferor** (Do not issue a T4RSP or T4RIF slip for the amount transferred)

1. We have transferred \$ _____ from the RRSP or RRIF identified in Part A of Area I to the transferee named in Part C of Area I. If RRIF property is transferred to another RRIF or an RPP, we have paid or will pay the annuitant the minimum amount for the year.			
2. Is the transfer from a qualifying RRIF as defined on the back of this form?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Does not apply
3. Has the annuitant's spouse or common-law partner ever contributed amounts to the RRSP?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Does not apply
4. Does the RRIF include amounts transferred from an RRSP to which the annuitant's spouse or common-law partner has contributed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Does not apply
<b>Spouse or common-law partner</b> Last name	First name	Social insurance number	
5. The transferee has to continue to administer \$ _____ as a locked-in amount, as required by the <i>Pension Benefits Standards Act</i> or a provincial act (specify the act) _____. For some provinces, you can transfer pension funds and locked-in RRSP funds to a locked-in RRIF. <span style="float: right;"><input type="checkbox"/> Does not apply</span>			
I certify that the information given on this form is correct and complete.			
Transferor's name			Date
Authorized person's signature		Position or office	

**Area IV – Receipt by transferee** (Do not issue an official receipt for the amount transferred)

We have received \$ _____ for transfer and administration according to Area I and, if applicable, Area III.	
Transferee's name	Date
Authorized person's signature	Position or office

**DIRECT TRANSFER UNDER SUBSECTION 146.3(14.1) OR PARAGRAPH 146(16)(a) OR 146.3(2)(e)**

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**Area I – Annuitant**

Last name	First name and initials	Social insurance number
Address		Telephone

**Part A – Transfer from an RRSP or a RRIF**

I am the annuitant under the registered retirement savings plan (RRSP). Individual plan number, and name \_\_\_\_\_

I am the annuitant under the registered retirement income fund (RRIF). Individual fund number, and name \_\_\_\_\_

Name of RRSP issuer or RRIF carrier	Address
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**Part B – Description of amount to be transferred**

Please transfer all  of the property,  the lump sum of \$ \_\_\_\_\_, or  payments of \$ \_\_\_\_\_, which represents all or part of the property of my unmatured RRSP identified in Part A,  in cash or  in kind.

Except for enough property to pay me the minimum amount this year, please transfer all  of the property or  the lump sum of \$ \_\_\_\_\_, which represents part of the property of my RRIF identified in Part A,  in cash or  in kind.

**Part C – Identifying the RRSP, RRIF, or RPP the funds are being transferred to**

Please transfer the above-mentioned RRSP property to my RRSP. Individual plan number, and name \_\_\_\_\_

Please transfer the above-mentioned RRSP or RRIF property to my RRIF. Individual fund number, and name \_\_\_\_\_

Please ensure that the transfer of the above-mentioned RRSP or RRIF property is credited to my account as a member of this registered pension plan (RPP). CRA registration number, and name \_\_\_\_\_

Name of RRSP issuer, RRIF carrier, or RPP administrator	Address
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Date	Annuitant's signature	or <input type="checkbox"/> See letter attached
2008/06/27		

**Area II – Transferee**

1. We agree to the above request for a direct transfer of property. When we receive the property, we will credit it to the annuitant or member under the plan or fund identified in Part C of Area I. If the plan or fund is an RRSP or a RRIF that conforms to a specimen plan or fund, it will conform with the specimen identified as:

\_\_\_\_\_ We will check the plan or fund identification in Part C of Area I, and add or correct information as necessary.

Specimen plan or fund number, and name

2. The plan or fund is registered under the *Income Tax Act* or, if the plan or fund is not registered, we will apply for such registration according to Information Circulars 72-22 and 78-18.

Transferee's name	Date
Authorized person's signature	Position or office

**Area III – Transferor** (Do not issue a T4RSP or T4RIF slip for the amount transferred)

1. We have transferred \$ _____ from the RRSP or RRIF identified in Part A of Area I to the transferee named in Part C of Area I. If RRIF property is transferred to another RRIF or an RPP, we have paid or will pay the annuitant the minimum amount for the year.		
2. Is the transfer from a qualifying RRIF as defined on the back of this form?	<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Does not apply
3. Has the annuitant's spouse or common-law partner ever contributed amounts to the RRSP?	<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Does not apply
4. Does the RRIF include amounts transferred from an RRSP to which the annuitant's spouse or common-law partner has contributed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Does not apply
<b>Spouse or common-law partner</b> Last name	First name	Social insurance number
5. The transferee has to continue to administer \$ _____ as a locked-in amount, as required by the <i>Pension Benefits Standards Act</i> or a provincial act (specify the act) _____. For some provinces, you can transfer pension funds and locked-in RRSP funds to a locked-in RRIF. <input type="checkbox"/> Does not apply		
I certify that the information given on this form is correct and complete.		
Transferor's name		Date
Authorized person's signature	Position or office	

**Area IV – Receipt by transferee** (Do not issue an official receipt for the amount transferred)

We have received \$ _____ for transfer and administration according to Area I and, if applicable, Area III.	
Transferee's name	Date
Authorized person's signature	Position or office

**DIRECT TRANSFER UNDER SUBSECTION 146.3(14.1) OR PARAGRAPH 146(16)(a) OR 146.3(2)(e)**

You can use this form to record a direct transfer. Please print, and check the boxes that apply to you. See the back of this form for instructions and definitions. Legislative references on this form are from the *Income Tax Act*.

**Area I – Annuitant**

Last name	First name and initials	Social insurance number
Address		Telephone

**Part A – Transfer from an RRSP or a RRIF**

I am the annuitant under the registered retirement savings plan (RRSP). Individual plan number, and name \_\_\_\_\_

I am the annuitant under the registered retirement income fund (RRIF). Individual fund number, and name \_\_\_\_\_

Name of RRSP issuer or RRIF carrier	Address
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**Part B – Description of amount to be transferred**

Please transfer all  of the property,  the lump sum of \$ \_\_\_\_\_, or  payments of \$ \_\_\_\_\_, which represents all or part of the property of my unmatured RRSP identified in Part A,  in cash or  in kind.

Except for enough property to pay me the minimum amount this year, please transfer all  of the property or  the lump sum of \$ \_\_\_\_\_, which represents part of the property of my RRIF identified in Part A,  in cash or  in kind.

**Part C – Identifying the RRSP, RRIF, or RPP the funds are being transferred to**

Please transfer the above-mentioned RRSP property to my RRSP. Individual plan number, and name \_\_\_\_\_

Please transfer the above-mentioned RRSP or RRIF property to my RRIF. Individual fund number, and name \_\_\_\_\_

Please ensure that the transfer of the above-mentioned RRSP or RRIF property is credited to my account as a member of this registered pension plan (RPP). CRA registration number, and name \_\_\_\_\_

Name of RRSP issuer, RRIF carrier, or RPP administrator	Address
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Date	Annuitant's signature	or <input type="checkbox"/> See letter attached
2008/06/27		

**Area II – Transferee**

1. We agree to the above request for a direct transfer of property. When we receive the property, we will credit it to the annuitant or member under the plan or fund identified in Part C of Area I. If the plan or fund is an RRSP or a RRIF that conforms to a specimen plan or fund, it will conform with the specimen identified as:

\_\_\_\_\_ We will check the plan or fund identification in Part C of Area I, and add or correct information as necessary.

Specimen plan or fund number, and name

2. The plan or fund is registered under the *Income Tax Act* or, if the plan or fund is not registered, we will apply for such registration according to Information Circulars 72-22 and 78-18.

Transferee's name	Date
Authorized person's signature	Position or office

**Area III – Transferor** (Do not issue a T4RSP or T4RIF slip for the amount transferred)

1. We have transferred \$ _____ from the RRSP or RRIF identified in Part A of Area I to the transferee named in Part C of Area I. If RRIF property is transferred to another RRIF or an RPP, we have paid or will pay the annuitant the minimum amount for the year.			
2. Is the transfer from a qualifying RRIF as defined on the back of this form?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Does not apply
3. Has the annuitant's spouse or common-law partner ever contributed amounts to the RRSP?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Does not apply
4. Does the RRIF include amounts transferred from an RRSP to which the annuitant's spouse or common-law partner has contributed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Does not apply
<b>Spouse or common-law partner</b> Last name	First name	Social insurance number	
5. The transferee has to continue to administer \$ _____ as a locked-in amount, as required by the <i>Pension Benefits Standards Act</i> or a provincial act (specify the act) _____. For some provinces, you can transfer pension funds and locked-in RRSP funds to a locked-in RRIF. <span style="float: right;"><input type="checkbox"/> Does not apply</span>			
I certify that the information given on this form is correct and complete.			
Transferor's name			Date
Authorized person's signature		Position or office	

**Area IV – Receipt by transferee** (Do not issue an official receipt for the amount transferred)

We have received \$ _____ for transfer and administration according to Area I and, if applicable, Area III.	
Transferee's name	Date
Authorized person's signature	Position or office

**DIRECT TRANSFER UNDER SUBSECTION 146.3(14.1) OR PARAGRAPH 146(16)(a) OR 146.3(2)(e)**

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**Area I – Annuitant**

Last name	First name and initials	Social insurance number
Address		Telephone

**Part A – Transfer from an RRSP or a RRIF**

I am the annuitant under the registered retirement savings plan (RRSP). Individual plan number, and name \_\_\_\_\_

I am the annuitant under the registered retirement income fund (RRIF). Individual fund number, and name \_\_\_\_\_

Name of RRSP issuer or RRIF carrier	Address
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**Part B – Description of amount to be transferred**

Please transfer all  of the property,  the lump sum of \$ \_\_\_\_\_, or  payments of \$ \_\_\_\_\_, which represents all or part of the property of my unmatured RRSP identified in Part A,  in cash or  in kind.

Except for enough property to pay me the minimum amount this year, please transfer all  of the property or  the lump sum of \$ \_\_\_\_\_, which represents part of the property of my RRIF identified in Part A,  in cash or  in kind.

**Part C – Identifying the RRSP, RRIF, or RPP the funds are being transferred to**

Please transfer the above-mentioned RRSP property to my RRSP. Individual plan number, and name \_\_\_\_\_

Please transfer the above-mentioned RRSP or RRIF property to my RRIF. Individual fund number, and name \_\_\_\_\_

Please ensure that the transfer of the above-mentioned RRSP or RRIF property is credited to my account as a member of this registered pension plan (RPP). CRA registration number, and name \_\_\_\_\_

Name of RRSP issuer, RRIF carrier, or RPP administrator	Address
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Date	Annuitant's signature	or <input type="checkbox"/> See letter attached
2008/06/27		

**Area II – Transferee**

1. We agree to the above request for a direct transfer of property. When we receive the property, we will credit it to the annuitant or member under the plan or fund identified in Part C of Area I. If the plan or fund is an RRSP or a RRIF that conforms to a specimen plan or fund, it will conform with the specimen identified as:

\_\_\_\_\_ We will check the plan or fund identification in Part C of Area I, and add or correct information as necessary.

Specimen plan or fund number, and name

2. The plan or fund is registered under the *Income Tax Act* or, if the plan or fund is not registered, we will apply for such registration according to Information Circulars 72-22 and 78-18.

Transferee's name	Date
Authorized person's signature	Position or office

**Area III – Transferor** (Do not issue a T4RSP or T4RIF slip for the amount transferred)

1. We have transferred \$ _____ from the RRSP or RRIF identified in Part A of Area I to the transferee named in Part C of Area I. If RRIF property is transferred to another RRIF or an RPP, we have paid or will pay the annuitant the minimum amount for the year.		
2. Is the transfer from a qualifying RRIF as defined on the back of this form?	<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Does not apply
3. Has the annuitant's spouse or common-law partner ever contributed amounts to the RRSP?	<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Does not apply
4. Does the RRIF include amounts transferred from an RRSP to which the annuitant's spouse or common-law partner has contributed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Does not apply
<b>Spouse or common-law partner</b> Last name	First name	Social insurance number
5. The transferee has to continue to administer \$ _____ as a locked-in amount, as required by the <i>Pension Benefits Standards Act</i> or a provincial act (specify the act) _____. For some provinces, you can transfer pension funds and locked-in RRSP funds to a locked-in RRIF. <input type="checkbox"/> Does not apply		
I certify that the information given on this form is correct and complete.		
Transferor's name		Date
Authorized person's signature	Position or office	

**Area IV – Receipt by transferee** (Do not issue an official receipt for the amount transferred)

We have received \$ _____ for transfer and administration according to Area I and, if applicable, Area III.	
Transferee's name	Date
Authorized person's signature	Position or office



**DIRECT TRANSFER UNDER SUBSECTION 146.3(14.1) OR PARAGRAPH 146(16)(a) OR 146.3(2)(e)**

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**Area I – Annuitant**

Last name	First name and initials	Social insurance number
Address		Telephone

**Part A – Transfer from an RRSP or a RRIF**

I am the annuitant under the registered retirement savings plan (RRSP). Individual plan number, and name \_\_\_\_\_

I am the annuitant under the registered retirement income fund (RRIF). Individual fund number, and name \_\_\_\_\_

Name of RRSP issuer or RRIF carrier	Address
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**Part B – Description of amount to be transferred**

Please transfer all  of the property,  the lump sum of \$ \_\_\_\_\_, or  payments of \$ \_\_\_\_\_, which represents all or part of the property of my unmatured RRSP identified in Part A,  in cash or  in kind.

Except for enough property to pay me the minimum amount this year, please transfer all  of the property or  the lump sum of \$ \_\_\_\_\_, which represents part of the property of my RRIF identified in Part A,  in cash or  in kind.

**Part C – Identifying the RRSP, RRIF, or RPP the funds are being transferred to**

Please transfer the above-mentioned RRSP property to my RRSP. Individual plan number, and name \_\_\_\_\_

Please transfer the above-mentioned RRSP or RRIF property to my RRIF. Individual fund number, and name \_\_\_\_\_

Please ensure that the transfer of the above-mentioned RRSP or RRIF property is credited to my account as a member of this registered pension plan (RPP). CRA registration number, and name \_\_\_\_\_

Name of RRSP issuer, RRIF carrier, or RPP administrator	Address
---------------------------------------------------------	---------

Date	Annuitant's signature	or <input type="checkbox"/> See letter attached
2008/06/27		

**Area II – Transferee**

1. We agree to the above request for a direct transfer of property. When we receive the property, we will credit it to the annuitant or member under the plan or fund identified in Part C of Area I. If the plan or fund is an RRSP or a RRIF that conforms to a specimen plan or fund, it will conform with the specimen identified as:

\_\_\_\_\_ We will check the plan or fund identification in Part C of Area I, and add or correct information as necessary.

Specimen plan or fund number, and name

2. The plan or fund is registered under the *Income Tax Act* or, if the plan or fund is not registered, we will apply for such registration according to Information Circulars 72-22 and 78-18.

Transferee's name	Date
Authorized person's signature	Position or office

**Area III – Transferor** (Do not issue a T4RSP or T4RIF slip for the amount transferred)

1. We have transferred \$ _____ from the RRSP or RRIF identified in Part A of Area I to the transferee named in Part C of Area I. If RRIF property is transferred to another RRIF or an RPP, we have paid or will pay the annuitant the minimum amount for the year.		
2. Is the transfer from a qualifying RRIF as defined on the back of this form? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Does not apply		
3. Has the annuitant's spouse or common-law partner ever contributed amounts to the RRSP? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Does not apply		
4. Does the RRIF include amounts transferred from an RRSP to which the annuitant's spouse or common-law partner has contributed? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Does not apply		
<b>Spouse or common-law partner</b> Last name	First name	Social insurance number
5. The transferee has to continue to administer \$ _____ as a locked-in amount, as required by the <i>Pension Benefits Standards Act</i> or a provincial act (specify the act) _____. For some provinces, you can transfer pension funds and locked-in RRSP funds to a locked-in RRIF. <input type="checkbox"/> Does not apply		
I certify that the information given on this form is correct and complete.		
Transferor's name		Date
Authorized person's signature	Position or office	

**Area IV – Receipt by transferee** (Do not issue an official receipt for the amount transferred)

We have received \$ _____ for transfer and administration according to Area I and, if applicable, Area III.	
Transferee's name	Date
Authorized person's signature	Position or office