

PART I – Annuitant Request

Name: _____ SIN: _____ Telephone: _____

Address: _____

Transferor Institution Information:

Name of Issuer: _____

Address of Issuer: _____

Contract or plan# : _____ Deposit # : _____ Maturity Date (if applicable): _____

PLEASE TRANSFER IN CASH: All of the property OR Partial (Amount/Details):

***Where I have requested a transfer in cash, I authorize the liquidation of all or part of my investments. I agree to pay any applicable fees, charges or adjustments.**

FROM the above RRSP Spousal RRSP LIRA/Locked-In RSP RLIF RPP DPSP TFSA
 RRIF Spousal RRIF LIF LRIF Prescribed RRIF Retiring Allowance

Receiving Institution Information:

Achieva Financial, P.O. Box 2729 Winnipeg, Manitoba, R3C 4B3 (1-877-224-4382) ACCOUNT #

TO the RRSP Spousal RRSP LIRA/Locked-In RSP RLIF TFSA
 RRIF Spousal RRIF LIF LRIF Prescribed RRIF

*Credit Union Retirement Savings Plan RSP 145-658 Credit Union Retirement Income Fund RIF– 988
 CU Tax Free Savings TFSA01450014*

Trustee: *Concentra Trust*

Complete ONLY If from Registered Pension Plan (RPP)/Deferred Profit Sharing Plan (DPSP)

I am the customer, OR, the beneficiary spouse*, **OR**,
 former spouse* due to breakdown of marriage or common law partnership
 * Or other individual who has been given similar rights under applicable legislation

 (Date) (Annuitant Signature) **or** see attached letter

Authorized Signature by Transferee _____

CERTIFIED TRUE COPY	SIGNATURE GUARANTEED
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PART II – To be completed by Transferor Institution

Amount transferred \$ _____ (Transferor to issue a T4RIF for transfers from RRIF to RRSP, or T4A for transfer of Retiring Allowance)

TFSA Funds: No Yes

Spousal Contributions: No Yes Contributor Name: _____ SIN: _____

Locked-in Funds: No Yes (if yes, complete pension information on page 2)

Retiring Allowance: Amount to be reported in Box 66 (Eligible Retiring Allowances) of the employees T4 slip \$ _____

From RRIF : The transfer is from a Qualifying Pre-1993 RRIF. No Yes

From RPP: We did not transfer \$ _____ of the amount in accordance with subsections 147.3(1) to (8) and, we

will report this amount as the applicant’s income on a T4A slip.

Complete the following if amounts are Locked-in under Pension Legislation:

Locked in Pension Amount \$ _____

Pension Jurisdiction (provincial or federal act): _____

Have funds been held in a LIF/LRIF/RLIF/LITB account at any time during year of transfer? No Yes

If transfer to **ON Schedule 1.1 LIF:** What is income earned on Schedule 1 LIF, Schedule 1.1 LIF or LRIF transferred amounts during year of transfer? \$ _____

If transfer to **MB LIRA/LIF:** The annuitant has or has not made a one-time transfer with our organization or that we are aware of.

If transfer to **MB LIF:** What is the annual maximum payment for the year (LIF/VBA to LIF)? \$ _____
What amount of the annual maximum has been received by the annuitant (LIF/VBA to LIF)? \$ _____

If transfer to **AB or BC LIF:** What is the annual maximum payment for the year (LIF/LITB Account to LIF)? \$ _____
What amount of the annual maximum has been received by the annuitant (LIF/LITB Account to LIF)? \$ _____

Additional Information:

- Name of employer: _____
- Original RPP name: _____
- Retirement Age specified under the RPP: _____ (Normal) _____ (Early)
- Annuity Rate Breakdown: \$ _____ (Unisex) \$ _____ (Sex Distinct)

Date Authorized Signature of Transferor Institution Print Name Contact Phone Number

PLEASE RETURN BOTH PAGES WITH CHEQUE PAYABLE TO ACHIEVA FINANCIAL

Please indicate where you would like your TFSA funds once they are transferred to our office and return with the Direct Transfer-In of TFSA Form.

TFSA Savings

TFSA GIC

Compounding or Paid Annually

***Interest paid annually will go into a TFSA Savings.**

Select GIC Term

1yr 2yr 3yr 4yr 5yr