

APPLICATION FORM

RETIREMENT SAVINGS PLAN (the "Plan")

The Lutheran Church-Canada, Alberta – British Columbia District Investments, Ltd. (ABC DISTRICT INVESTMENTS LTD.)

CONTRACT NUMBER:	TRANSFER FROM: RRSP _____ RRIF _____ RPP _____	LOCKED-IN YES _____ _____	LOCKED-IN NO _____ _____
		Jurisdiction (attach addendum)	

ANNUITANT'S INFORMATION			
(To establish this Plan for your Spouse, enter his/her name here and then enter your information below in the Spousal Information Section.)			
LAST NAME	GIVEN NAME	INITIAL	SOCIAL INSURANCE NUMBER
HOME ADDRESS		DATE OF BIRTH (YY/MM/DD)	
CITY	PROVINCE	POSTAL CODE	PHONE NUMBER

SPOUSAL INFORMATION			
(Complete only if contribution is being made by, and claimed as deduction by, Annuitant's spouse.)			
CONTRIBUTOR'S LAST NAME	GIVEN NAME	INITIAL	SOCIAL INSURANCE NUMBER
CONTRIBUTOR'S HOME ADDRESS			
CITY	PROVINCE	POSTAL CODE	

BENEFICIARY DESIGNATION	
<p>In accordance with the Declaration of Trust under the Plan, I hereby revoke any previous designation of beneficiary made by me in respect of the Plan and I hereby designate:</p>	
Name: _____	Relationship: _____
Address: _____	SIN: _____ Minor (Y/N) _____
<p>as the person entitled to receive the proceeds of the Plan in the event of my death. <i>For additional and/or alternate beneficiaries complete a separate page.</i></p>	
<p>The beneficiary(s) designated herein must survive me and accept this designation in order to receive benefits payable under this Plan. If more than one beneficiary is entitled to receive benefits, they shall share the proceeds equally unless otherwise specified.</p>	
<p>CAUTION:</p> <ol style="list-style-type: none"> 1) Your designation of beneficiary by means of a designation form will not be revoked or changed automatically by any future marriage or divorce. Should you wish to change your beneficiary in the event of a future marriage or divorce, you will have to do so by means of a new designation. 2) Your estate may be responsible for reporting and paying income tax on proceeds paid to a designated beneficiary. 3) If funds contained in this contract are subject to a pension lock-in, the locking-in addendum governing such Pension Lock-in may override this designation if a person other than your spouse is designated to receive the proceeds. 	
_____ Date (DD/MMM/YYYY)	_____ Witness (should not be a beneficiary or a relative of Annuitant)
_____ Annuitant Signature	
Note: Must be signed and witnessed to be valid.	

DECLARATION TO: CONCENTRA TRUST, TRUSTEE

As a member, adherent or support of the Lutheran Church – Canada, The Alberta – British Columbia District (the “Church”), I hereby apply for membership in the Plan and request Concentra Trust to act as trustee of the Plan. I agree to comply with the terms and conditions stated herein and in the Declaration of Trust which I acknowledge having received. I request that the Trustee apply for registration of my Plan with the proper authorities pursuant to the provisions of Section 146 of the *Income Tax Act* (Canada) and if applicable, with income tax legislation of the Province indicated in my home address above.

I appoint the LUTHERAN CHURCH-CANADA, THE ALBERTA – BRITISH COLUMBIA DISTRICT INVESTMENTS LTD. to be my Agent for the administration and record keeping of my Plan for which Concentra Trust acts as trustee and for the ongoing valuation and administration of the Plan as defined in the Declaration of Trust.

I acknowledge that it is my sole responsibility to determine the maximum permitted deduction which I may claim under the *Income Tax Act* (Canada) with respect to my contributions to the Plan.

I understand and acknowledge that investments of the Plan will be made principally in mortgages on Church property or other worthwhile projects having a significant support base from the members, adherents or supporters of the Church, and as a result the fair market value and marketability of such investments may be affected.

I understand that any benefit received under the Plan is taxable in accordance with Section 146 of the *Income Tax Act* (Canada).

I understand that Concentra Trust shall give no investment advice in connection with the purchase, retention, or sale of any investment.

I certify that the information provided herein by me is correct and is the basis for establishing my Plan.

I confirm that the information provided to Concentra Financial Services Association, its agents or affiliates (collectively “Concentra Financial”) is complete and accurate. I hereby agree and consent to, and accept this as notice of, the terms of the Concentra Financial Confidentiality and Privacy Statement (located at http://www.concentrafinancial.ca/confidential_privacy.asp). I further agree and consent to Concentra Financial obtaining and retaining my personal information in order to ascertain my identity as required by the *Proceeds of Crime (Money Laundering) and Terrorist Financing Act* and as required by law.

		FOR SPOUSAL OR COMMON-LAW PARTNER PLAN ONLY:	
ANNUITANT'S SIGNATURE	DATE	CONTRIBUTOR'S SIGNATURE	DATE
(WITNESS)	DATE	(WITNESS)	DATE

NOTE: THE WITNESS SHOULD NOT BE A BENEFICIARY OR ANY PERSON RELATED TO A BENEFICIARY OR RELATED TO THE ANNUITANT.

ACCEPTANCE: This application is accepted by the Lutheran Church - Canada, The Alberta - British Columbia District Investments Ltd. on behalf of the Trustee.	
AUTHORIZED SIGNATURE:	DATE: