

TRANSFER FORM

Lutheran Church Canada, The Alberta British Columbia
District Investments, Ltd.
(ABC DISTRICT INVESTMENTS LTD.)
7100 ADA BLVD., EDMONTON, AB T5B 4E4
PHONE: 1-888-474-0063 FAX: 780-477-9829

Please return the completed form with cheque and any attachments, to ABC District Investments Ltd.

Part I – Annuitant/Holder Request

(Name) _____ (Social Insurance Number) _____ (Telephone) _____

(Full Address)

PLEASE TRANSFER:

FROM: RRSP RRIF RPP DPSP Retiring Allowance TFSA Spousal RRSP Spousal RRIF LIRA/LIF

(Transferor Institution Name, Address and Phone Number)

(Contract / Plan # or Deposit #)

(Maturity Date, if applicable)

All of the property Lump sum of \$ _____ IN CASH

TO:

Contract# _____ at Lutheran Church-Canada, The Alberta British Columbia District Investments, Ltd.

RETIREMENT SAVINGS PLAN RSP 145-694

Spousal RRSP

RETIREMENT INCOME FUND RIF-1294

Spousal RRIF

TFSA TFSA0145-0154

LIRA/LIF

Trustee:

Concentra Trust

If from RPP/DPSP: I am the member, or the beneficiary spouse*, or, former spouse due to marriage breakdown
* "or other individual who has been given similar rights under applicable legislation"

Date: _____ Annuitant Signature _____ or, see attached letter

CERTIFIED BY: _____

(AUTHORIZED SIGNATURE OF TRANSFEREE LUTHERAN CHURCH CANADA, THE ALBERTA BRITISH COLUMBIA DISTRICT INVESTMENTS LTD.)

PART II – Transferor Institution

Amount transferred: \$ _____ (Transferor to issue T4RIF for transfers from RRIF to RRSP, or T4A for Retiring Allowance Transfer.)

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

Locked in Funds: No Yes (if yes, complete pension information below)

Retiring Allowance: Amount to be reported in Box 26 (Eligible Retiring Allowances) of the employee's T4A 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 (7),
And, we will report this amount as income of the applicant on a T4A slip.

COMPLETE IF AMOUNTS ARE LOCKED-IN UNDER PENSION LEGISLATION:

LOCKED IN PENSION AMOUNT \$ _____

HAVE FUNDS BEEN HELD IN A LIF/LRIF AT ANY TIME DURING YEAR OF TRANSFER? NO YES

If transfer to ON LRIF: 1) What is income earned in LIF/LRIF during year of transfer? \$ _____

2) What is the 'maximum room' carry forward amount from LRIF? \$ _____

If transfer to AB or NF LRIF: What is income earned in LIF during year prior to year of transfer? \$ _____

If transfer to MB LRIF: What is income earned in LIF during year of transfer? \$ _____

PENSION JURISDICTION (PROVINCIAL OR FEDERAL ACT) _____

· Name of Company where individual was employed: _____

· Location where individual worked at termination (city or town/prov.): _____ Position Held: _____

Original RPP Name: _____

· Name/Address or Pension Plan Administrator: _____

· Year funds transferred out of pension plan: _____

· Retirement Age specified under RPP: _____ (Normal) _____ (Early)

· Marial Status: _____

· Annuity Rate Breakdown: \$ _____ \$ _____

(MB Jurisdiction ONLY)

(Unisex)

(Sex Distinct)

· NS and PEI (and federal NON-PBSA, 1985) Jurisdictions ONLY: Does the pension plan provide for release of funds if a medical practitioner provides a statement that the member's life expectancy has been shortened considerably? NO YES (copy of applicable section of RPP enclosed)

(Date)

(Authorized Signature of Transferor Institution)

(Contact Phone Number)