

Application for direct transfer of assets

Use this form for transfer of registered and non-registered plan assets from another financial institution to Sun Life Financial.

For SLF use:

Instructions for annuitant/owner

(The term “annuitant” means the person who is entitled to receive payments from the plan.)

- Complete sections 1, 2, 3 and 6.
- **Forward the signed form to the relinquishing institution (currently holding the assets).**

Instructions for relinquishing institution (financial institution currently holding the assets)

- Complete section 5 and return the form to Sun Life Financial at the address indicated below, along with a cheque for deposit into the annuitant/owner’s account.

PO Box 11001 Stn CV, Montreal QC H3C 3P3

For couriers, please use:

1155 Metcalfe Street, Suite 660, Montreal QC H3B 2V9

Nota : La version française de ce document est également disponible.

Please PRINT clearly.

1 Owner/annuitant identification

First name		Middle initial	Last name	
Date of birth (dd-mm-yyyy)		Social Insurance Number*		
Address (street number and name)			Apartment or suite	
City		Province	Postal code	Telephone number (day)
Email address				Telephone number (evening)

*Your Social Insurance Number is used for administrative purposes so that information on this form is applied to your account.



2 Direction to relinquishing institution

If transfer is from more than one source, complete a separate form for each source product.

Relinquishing institution name			
Address (street number and name)			Apartment or suite
City	Province	Postal code	Telephone number
Individual account number or Group identification number		Group Plan Name	

Transfer all assets as at date of transfer in cash. or Transfer \$ _____ in cash.

From my:

RRSP* LIRA RPP RRIF LIF LRIF RLIF PRIF

*Spousal RRSP's are NOT eligible for transfer to the UBC Faculty Pension Plan. To be eligible, the contributions to the RRSP you are requesting transferred must have been made by yourself (the plan member) in your own name and not by or for a spouse.

As a lump sum transfer to my RPP with Sun Life Financial:

Plan sponsor name The Trustees for the UBC Faculty Pension Plan	Client ID C0KHL	My account number
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3 Authorization

I hereby request the transfer of my investments as described above. I authorize the liquidation of all or part of my investments and agree to pay any applicable fees, charges or adjustments.

Signature of annuitant/owner X	Date (dd-mm-yyyy)
Signature of irrevocable beneficiary/former spouse (if applicable) X	Date (dd-mm-yyyy)

4 Locked-in confirmation

Sun Life Financial acknowledges that the 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.

Sun Life Assurance Company of Canada's acceptance of application.

Authorized signatures: President and Chief Executive Officer

Secretary

5 Certification by relinquishing institution

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

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

Do not issue a T4RSP, T4RIF or T4A for the amount transferred.

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

Locked in amount \$	Pension jurisdiction	Pre amount \$	Post amount \$
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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.

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

Is the transfer from a qualifying RRIF? 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 Deposit of transferred assets

The transferred assets will be deposited 100% to the UBC FPP Balanced Fund. Investment changes can be made online at mysunlife.ca/ubcfpp or through the Sun Life Client Care Centre at 1-844-UBC-3131.

Signature of annuitant/owner X	Date (dd-mm-yyyy)
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Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.