

# Direct transfer to payout annuity

(for Transfer of RRSP, RPP, DPSP or LIRA funds from another company)

## 1 Applicant and plan information

To be completed by the advisor/applicant.

Applicant's Name		Social Insurance Number	
Address		Telephone ( )	
Plan No.	Plan Name		
Name of Plan Issuer/Administrator			
Address			

## 2 Request for transfer

To be completed by advisor/  
signed by applicant.

I request the direct transfer of:

- all \_\_\_\_\_, or  
 \$ \_\_\_\_\_ as part of my  
 RPP     LIRA     DPSP     RRSP

To: Sun Life Financial  
227 King Street South  
WATERLOO ON N2J 4C5

as a lump-sum payment to:

Payout Annuity # \_\_\_\_\_, to be registered as

- RRSP     RPP     DPSP

Applicant's signature X	Date (d/m/y)
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## 3 Certification by transferor

To be completed and signed  
by the authorized person of  
the other company.

NOTE: Do not issue a  
T4RSP or T4A.

1. I confirm \$ \_\_\_\_\_ is transferred from the plan identified in section 1 to the transferee named in section 2.

Plan Registration # \_\_\_\_\_

2. Does the direct transfer include locked-in amounts?     No     Yes

If 'yes', specify Pre/Post split, if applicable:

Pre Amount    \$ \_\_\_\_\_

Post Amount    \$ \_\_\_\_\_

- Not Applicable

This transfer is made on the basis the transferee continues to administer this amount as locked-in.

**3 Certification by transferor (continued)**

3. Does the direct transfer include amounts contributed by the Applicant's spouse?  No  Yes

Name of spouse	
Spouse's Social Insurance Number 	Spouse's Date of Birth (d/m/y)

**Certification**

I hereby certify the information in section 3 is true, correct and complete in every respect.

Name of Transferor	
Signature of Authorized Person X	Date (d/m/y)