

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.

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)