



Transfer Authorization for Registered Investments (RRSP, LIRA, LRSP, RRIF, LIF)

This form can be used for transfers between RRSPs (except for transfers due to death) and for RRSP to RRIF transfers.

Note: You do not have to use this form. If, as the transferor, you provide the transferee with the information required to correctly complete the transfer (e.g., funds are from a locked-in plan, a spousal plan, or a qualifying RRIF), you can use the method of documentation of your choice.

Do not use this form for:

- A direct transfer of a full or partial commutation of an RRSP annuity to another RRSP or to a RRIF (use form T2030, Direct Transfer Under Subparagraph 60(l)(v) instead);
- A direct transfer of an excess amount from a RRIF to another RRIF or to an RRSP (use form T2030 instead); or
- A direct transfer from an RRSP or RRIF because of the breakdown of a marriage (use form T2220, Transfer from an RRSP or a RRIF to another RRSP or RRIF on marriage breakdown, instead).

SECTION A

Client identification

Policyholder's last name / Account _____ First name _____ Initial _____

Address _____

City _____ Province _____ Postal code _____

Social Insurance Number _____ Home telephone number _____ Business number _____

SECTION B

Receiving institution information

Industrial Alliance Insurance and Financial Services Inc.

Address _____ Postal code _____

Contact name _____

Client policy number _____ Group plan number (if applicable) _____

Agent name _____ **Agent code** _____ **Agency code** _____

Agent telephone number _____ Agent fax number _____

Registration type: RRSP RRIF LIRA LIF
 Spousal RRSP Spousal RRIF Group RRSP LRSP

Please attach an application (F17A) or investment instructions (F51-153A(1)) with this form

SECTION C

Client's instructions to relinquishing institution

Relinquishing institution's name _____

Address _____

City _____ Province _____ Postal code _____

Client policy number _____ Group plan number (if applicable) _____

Transfer: (check one box only)

All, in cash* Partial, in cash - as listed below or on attached list*.

*Please refer to statement in bold in **Client authorization** section below.

<input type="checkbox"/> In kind	<input checked="" type="checkbox"/> In cash	Investment amount _____	Certificate number/policy number _____
<input type="checkbox"/> Share / units	<input checked="" type="checkbox"/> Dollars	Investment description _____	
<input type="checkbox"/> In kind	<input checked="" type="checkbox"/> In cash	Investment amount _____	Certificate number/policy number _____
<input type="checkbox"/> Share / units	<input checked="" type="checkbox"/> Dollars	Investment description _____	

Special instructions _____

SECTION D

Client authorization

I hereby request the transfer of my account and its investments as described above.

* I have requested a transfer in cash, and I therefore authorize the liquidation of all or part of my investments and agree to pay any applicable fees, charges or adjustments to the relinquishing institution.

Signature of policyholder _____ Date _____

Irrevocable beneficiary: I consent to the transfer of the account.

Signature of irrevocable beneficiary (if applicable) _____ Date _____

SECTION E

For use by relinquishing institution only

Registration type: RRSP LIRA Locked-in RRSP RRIF LIF Eligible Not Eligible

Amount transferred: _____ Spousal plan: NO YES If yes _____ Spouse's Social Insurance Number _____

Spouse's last name _____ First name _____ Initial _____

Locked-in funds: NO YES - Locked-in. **The locked-in confirmation must be attached to this form** Locked-in funds _____ Applicable legislation _____

Contact name _____ Telephone number _____ Fax number _____

Authorized signature _____ Date _____