



# Request for Transfer from a Registered Pension Plan

## 1. Personal Information

Last name \_\_\_\_\_ First name \_\_\_\_\_

Address \_\_\_\_\_  
Street number and name Apt. City Province Postal code Country

Telephone number (area code and number) \_\_\_\_\_ Social insurance number \_\_\_\_\_ Date of birth \_\_\_\_\_  
YYYY MM DD

Indicate your status:

- Member of the pension plan.
- Pension partner or beneficiary requesting a transfer following the death of a member.
- Former pension partner of a member of the pension plan requesting a transfer following marital breakdown.

## 2. Transfer From (to be completed by the plan administrator)

Pension Plan name \_\_\_\_\_ Registration number (Canada Revenue Agency) \_\_\_\_\_

Plan administrator's name Alberta Pensions Services Corporation (APS)

Plan administrator's address 5103 Windermere BLVD. SW Edmonton Alberta T6W 0S9 Canada  
Street number and name City Province Postal code Country

For the transfer of locked-in amounts, the Pension legislation governing the locking-in rules is Alberta's **Employment Pension Plans Act** (EPPA).

## 3. Transfer To (to be completed by the member, other person requesting the transfer of the financial institution)

*If the amount is locked-in, please complete Section 3A. If the amount is not locked-in, please skip to section 3B.*

### 3A – Locked-in amount to be transferred

I hereby request a direct transfer of my funds from the registered pension plan indicated in section 2.

- Transfer to Locked-in Retirement Account (LIRA)

Name of receiving financial institution \_\_\_\_\_

Address \_\_\_\_\_  
Street number and name City Province Postal code Country

Telephone number (area code and number) \_\_\_\_\_ Individual account number \_\_\_\_\_

Name of plan and specimen plan number approved by the Canada Revenue Agency \_\_\_\_\_

Before your pension plan will transfer the payment of your commuted value to your LIRA, they must ensure the financial institution is named on the Superintendent's List of Financial Institutions Offering Locked-in Pension Products. The most recent version of this list is available online at [www.finance.alberta.ca](http://www.finance.alberta.ca).



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### 3B – Non-locked-in amount to be transferred

I hereby request a direct transfer of my funds from the registered pension plan indicated in section 2.

RRSP

Name of receiving financial institution \_\_\_\_\_

Address \_\_\_\_\_  
Street number and name City Province Postal code Country

Telephone number (area code and number) Individual account number

Name of plan and specimen  
plan number approved by the Canada Revenue Agency \_\_\_\_\_

### 4. Locking-In Acknowledgment by an Authorized Officer (to be completed by the financial institution receiving funds only when section 3A has been completed)

I certify that this financial institution is entitled to offer and issue Locked-in Retirement Accounts (LIRA) as prescribed under Alberta's *Employment Pension Plans Act* (EPPA). This financial institution agrees to deposit these funds into a LIRA as set out under the *Employment Pension Plans Regulation*. I acknowledge that these funds must be locked-in and may be released only to provide a lifetime retirement annuity.

Name of financial institution \_\_\_\_\_

Name of authorized officer \_\_\_\_\_ Phone number \_\_\_\_\_

Signature of financial institution \_\_\_\_\_ Date \_\_\_\_\_

### 5. Signature (to be completed by the member or other person requesting the transfer)

I authorize to have the benefits indicated in section 3 transferred out of the registered pension plan indicated in section 2. I acknowledge that I am no longer entitled to any benefits under the registered pension plan. I acknowledge that any locked-funds will be transferred to a LIRA at the financial institution indicated on this form. I understand I cannot change my choice once the funds are deposited with the financial institution.

Signature \_\_\_\_\_ Date \_\_\_\_\_