



**Part 1: Client/Annuitant Information**

First Name	Initial	Last Name
Street	City	Province
		Postal Code
Telephone Number: ( _____ ) _____		Social Insurance Number: _____ <b>(Must be completed)</b>
<b>Transfer my:</b> <input type="checkbox"/> RSP <input type="checkbox"/> LIRA/LIRSP <input type="checkbox"/> RIF <input type="checkbox"/> LIF <input type="checkbox"/> RLSP <input type="checkbox"/> RLIF <input type="checkbox"/> TFSA <input type="checkbox"/> DPSP <input type="checkbox"/> Retiring Allowance <input type="checkbox"/> Pension		
<input type="checkbox"/> Full Transfer		<input type="checkbox"/> In cash
<input type="checkbox"/> Partial Transfer or lump sum of \$ _____		<input type="checkbox"/> In kind

**FROM**

Transferor (Relinquishing) Institution Name \_\_\_\_\_

Address \_\_\_\_\_

Contract/Plan # \_\_\_\_\_      Deposit # \_\_\_\_\_      Maturity Date, if applicable \_\_\_\_\_

**TO League Savings and Mortgage Company**

6074 Lady Hammond Road, Halifax, NS B3K 2R7

Contract # \_\_\_\_\_      Tick applicable Specimen Plan       RSP 421-1  
 RIF 210  
 TFSA 04210019

If from RPP/DPSP:    I am the member   OR    the beneficiary spouse \*\*   OR  
 former spouse \*\* due to breakdown of marriage    Common Law Partner  
 \*\* or other individual who has been given similar rights under applicable legislation

Client/Annuitant Signature \_\_\_\_\_      Date: \_\_\_\_\_  
**(OR,  see letter attached)**

Certified By: \_\_\_\_\_      League Savings and Mortgage  
 (Authorized Agent Name and Phone Number)      (Transferee Institution)

**Part 2: Completed by Transferor (Relinquishing) Institution**

Amount Transferred: \$ \_\_\_\_\_ (Transferor to issue T4RIF for transfers from RRIF to RRSP or T4 for Retiring Allowance Transfer)

Spousal Plan (N/A for TFSA)    No       Yes - ***If yes complete:***

**Contributor Name:** \_\_\_\_\_      **SIN** \_\_\_\_\_

Locked-In Funds       No       Yes - ***If yes complete pension information below***

Retiring Allowance:      Amount to be reported in Box 26 (Eligible Retiring Allowance) of the employee's T4A slip -  
 \$ \_\_\_\_\_

From RRIF:      The transfer is from a Qualifying Pre-1993 RRIF       No       Yes

From RPP:      We did not transfer \$ \_\_\_\_\_ of the amount in accordance with subsection  
 147.3(1) to (7) and we will report this amount as income of the applicant on a T4A Slip.

From TFSA:      The value of property in the holder's TFSA just before the transfer was \$ \_\_\_\_\_

**Complete if amounts are Locked-In under Pension Legislation:**

Locked-in Pension Amount      \$ \_\_\_\_\_

Have funds been held in a LIF/LRIF/RLIF at any time during year of transfer?    No       Yes

Funds originated from \_\_\_\_\_ Pension Fund

Pension Legislation \_\_\_\_\_ (attach copies of documentation to support the jurisdiction)

Annuity Rate Breakdown      \$ \_\_\_\_\_ (Unisex)      \$ \_\_\_\_\_ (Sex Distinct)

\_\_\_\_\_      \_\_\_\_\_      \_\_\_\_\_  
 Date      Authorized Signature of Transferor Institution      Contact Phone Number