



**Part 1: Client/Annuitant Information**

First Name \_\_\_\_\_ Initial \_\_\_\_\_ Last Name \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Telephone Number: ( \_\_\_\_\_ ) \_\_\_\_\_ Social Insurance Number: \_\_\_\_\_  
**(Must be completed)**

Transfer my:  RSP  LIRA/LIRSP  RIF  LIF  RLSP  RLIF  TFSA  
 DPSP  Retiring Allowance  Pension

Full Transfer  In cash  
 Partial Transfer or lump sum of \$ \_\_\_\_\_

**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  LIRA 421-1  
 RSP 421-1  
 LIF 210  
 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 \_\_\_\_\_