

Identification of annuitant

_____	_____	_____
Last Name	First Name	Social Insurance Number

Contract/Accounts

1. To be filled out by the institution making the transfer

Name of institution: _____

A) What type of plan are the locked-in funds held in?

- ☐ Defined-Contribution Registered Pension Plan
- ☐ Defined-Benefit Registered Pension Plan
- ☐ Locked-In Retirement Account (LIRA)
- ☐ Locked-In Retirement Account (Ontario-LIRA)
- ☐ Locked-In RRSP (LRSP)
- ☐ Life Income Fund (LIF)
- ☐ Locked-In Retirement Income Fund (LRIF)
- ☐ Other: _____

B) Pension plan legislation applicable to locked-in funds

- ☐ The Quebec *Supplemental Pension Plans Act* and its regulations
- ☐ The 1985 federal *Pension Benefits Standards Act* and its regulations
- ☐ The Ontario *Pension Benefits Act* and its regulations
- ☐ Other: _____

C) If applicable, specify the % that must be allocated according to gender: _____ %

The information provided in this section is accurate and complete to the best of our knowledge.

Y	Y	Y	Y	M	M	D	D
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Date

Authorized signatory

Job Title

2. To be filled out by the institution receiving the transfer

Name of the institution: Beneva Inc. _____

A) The locked-in funds received by Beneva will be deposited in a:

- ☐ Defined-Contribution Registered Pension Plan
- ☐ Defined-Benefit Registered Pension Plan
- ☐ Locked-In Retirement Account (LIRA)
- ☐ Locked-In Retirement Account (Ontario-LIRA)
- ☐ Locked-In RRSP (LRSP)
- ☐ Life Income Fund (LIF)
- ☐ Locked-In Retirement Income Fund (LRIF)

We acknowledge and confirm that the funds to be transferred to Beneva will be administered according to the provisions and regulations of the legislation applicable to pension plans.

Beneva Inc. use the information provided in this application form for administrative purposes, with the exception of the social insurance number (SIN) which may only be used for tax purposes.

Y	Y	Y	Y	M	M	D	D
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Date

X

Authorized signatory

Job Title

Reserved for Beneva

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Contract No.

Investment
Client Services • Tel.: 1-877-841-8822
beneva.ca