



# DIRECT TRANSFER FROM OPTRUST

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## INSTRUCTIONS

This form must be completed if you want to transfer your pension entitlement from the OPSEU Pension Plan to a Locked-In Retirement Account (LIRA), Life Income Fund (LIF), Registered Retirement Savings Plan (RRSP) or Registered Retirement Income Fund (RRIF). If you are transferring to a LIRA or LIF please have your financial institution complete Section B and make a copy for your records before returning this form to OPTrust along with your completed Option Election form. **A separate form must be completed for each registered account you are transferring funds to.**

## A – Applicant Information *(to be completed by the person requesting the transfer of funds)*

Former Member	Surviving Spouse	Former Spouse		
Applicant's Last Name		Applicant's First Name		
Social Insurance Number	Telephone Number	Email Address		
Mailing Address		City/Town	Province	Postal Code
I request a transfer of \$ _____ from the OPSEU Pension Plan (RPP Registration Number 1012046) to my registered retirement account at the financial institution indicated below.				
Name of Financial Institution _____				
Address of Financial Institution _____		City/Town _____	Province _____	Postal Code _____
Account Number / Plan Number _____		LIRA	RRSP	LIF RRIF
Applicant's Signature _____		Date (Day-Month-Year) _____		

## B – Locked-In Certification *(to be completed by financial institution – for locked-in transfers only)*

The LIRA/LIF indicated in Part B above and the arrangement establishing the LIRA/LIF comply with the applicable terms of the *Pension Benefits Act* (Ontario) and the *Income Tax Act* (Canada) and will be administered accordingly.

Amount of funds to transfer that will be locked in: \$ \_\_\_\_\_

Authorized Person's Name _____	Telephone Number _____
Authorized Person's Signature _____	Date (Day-Month-Year) _____

**C – OPTrust’s Certification** *(to be completed by OPTrust)*

1. We have transferred \$ \_\_\_\_\_ according to one of the following subsections: 147.3 (1) to 147.3 (8) of the *Income Tax Act* (a lump-sum transfer from the OPSEU Pension Plan to a LIRA, LIF, RRSP or RRIF).

2. A lock-in provision applies to \$ \_\_\_\_\_ of the amount transferred under the *Ontario Pension Benefits Act*.

*A lock-in provision does not apply*

3. We did not transfer \$ \_\_\_\_\_ of the RPP single amount indicated in item 1 according to one of the following subsections: 147.3 (1) to (8). This amount will be reported by OPTrust as taxable income on the applicant’s T4A slip. The financial institution will issue an RRSP contribution receipt to the applicant for this amount.

I certify that the information given on this form is correct and complete.

Authorized Person’s Name

Authorized Person’s Signature

Telephone Number

Date (Day-Month-Year)

**D – Financial Institution’s Certification** *(to be completed by financial institution)*

Complete after the transfer has occurred and return to OPTrust.

1. We received \$ \_\_\_\_\_ and have credited the amount to the applicant’s:

**LIRA                  RRSP                  LIF                  RRIF**

2. The account/fund to which the single amount has been transferred is registered under the *Income Tax Act*.

3. If applicable, we will administer the amount indicated in item 2 of Section C as a locked-in amount under the recipient account or fund.

4. If applicable, we will issue an RRSP contribution receipt to the applicant for the amount indicated in item 3 of Section C.

I certify that the information given on this form is correct and complete.

Name of Financial Institution

Authorized Signature

Telephone Number

Date (Day-Month-Year)