

This form is to be used when requesting the transfer of RRSPs/RRIFs/TFSA's. Please return this form, and any applicable attachments, with the cheque made payable to AcceleRate Financial. Please note that AcceleRate Financial is not accepting locked-in pension transfers at this time.

PART I. Annuitant/Holder Request

Participant Annuitant/Holder Name _____ Social Insurance Number (SIN) _____ Phone Number _____

Address _____

Name and Address of RRSP Issuer/RRIF Carrier/TFSA Carrier _____

Contract # _____ Deposit # _____ Maturing Date _____

Contract # _____ Deposit # _____ Maturing Date _____

PLEASE TRANSFER IN CASH: all of the property, or lump sum of \$ _____

From the above RRSP RRIF TFSA To Contract # _____ at AcceleRate Financial.

PO Box 1860, Stn Main, Winnipeg, MB R3C 3R1

- Credit Union Retirement Savings Plan RSP145-658 TRUSTEE: Concentra Trust
- Credit Union Retirement Income Fund RIF-988 TRUSTEE: Concentra Trust
- Credit Union Tax Free Savings Account TFSA01450238 TRUSTEE: Concentra Trust

Where I have requested a transfer in cash, I authorize the liquidation of all or part of my investments. I agree to pay any applicable fees, charges or adjustments.

_____ or see attached letter
Date DD/MM/YYYY Participant (Annuitant/Holder) Signature

Certified By: _____
Authorized Signature of Transferee Date DD/MM/YYYY

PART II. Transferor Institution

Amount Transferred: \$ _____ (Transferor to issue a T4RIF for transfers from RRIF to RRSP, or T4 for Retiring Allowance transfer.)

Spousal Contributions: No Yes Contributor Name: _____ SIN: _____

For RRIF to RRSP/RRIF Transfers:
 - We have paid the Annuitant the annual minimum amount for the year No Yes
 - The transfer is from a Qualifying Pre-1993 RRIF No Yes

Retiring Allowance: Amount to be reported in Box 66 (Eligible Retiring Allowances) of the employee's T4 slip. \$ _____

_____ Authorized Signature of Transferor _____ Position _____
Date DD/MM/YYYY



Please complete the Direct Transfer-In of RRSP/RRIF/TFSA form and return it to AcceleRate Financial along with these investment instructions.

Variable RRSP

Variable RRIF

Variable TFSA

Compounding RRSP GIC/ RRIF GIC/ TFSA GIC

Select GIC Term

1 Year 2 Year 3 Year 4 Year 5 Year 6 Year 7 Year

Signature