

Annuitant Information

Name (Surname first and at least one Given name) _____

Jurisdiction _____ Contract Number _____

Client Number _____

Contributor Information

Are these funds from a Spousal RRSP or RRIF? Y - Yes N - No *If Yes and this is the first deposit to contract, complete the following:*

Contributor's Name (Surname first and at least one given name) _____ Contributor's SIN _____

Payment Information *(Complete if first deposit to contract)*

Payment Method

Cheque
 Direct Deposit
 In-Kind

Cheque Address *(Complete for Payment Method "P" if different from annuitant's address)*

Postal Code _____

Complete for Direct Deposit or provide void cheque

Route _____ Transit _____

Account Number _____

Current Year

Annual Payment Amount = \$ _____ x _____ # of payments remaining this year
Payment Amount per frequency

Payment Option B - Basic Minimum S - Specified

Payment Frequency M - Monthly Q - Quarterly S - Semi-Annual A - Annual

Payment Date _____ MM-Mid Month ME-Month End
MM/ME Month

Annual Payment Amount _____

Next Year

Annual Payment Amount = \$ _____ x _____ # of payments in year
Payment Amount per frequency

Payment Option B - Basic Minimum S - Specified

Payment Frequency M - Monthly Q - Quarterly S - Semi-Annual A - Annual

Payment Date _____ MM-Mid Month ME-Month End
MM/ME Month

Annual Payment Amount _____

Note: Maximum payments apply to locked-in funds.

Deposit Information

Transaction Code

Transfer from RRSP, this institution
 Transfer from RRSP/RPP, another institution
 Transfer from Qualifying RRIF – Pre 1993 property
 Transfer from General RRIF – Post 1992 property
 Other Please Specify _____

Deposit Date _____ **Deposit Amount** _____

DD MM YYYY

Agent/Trustee Signature

Agent Name

Agent Number

Date

Annuitant's Signature