

ATLANTIC BAPTIST FOUNDATION
RETIREMENT SAVINGS PLAN # 145 - 682
INSTRUCTIONS FOR COMPLETING THE FORMS

Please read carefully before completing forms
(Complete each applicable form, **print firmly** so all copies are legible)

DECLARATION OF TRUST

Read the **Declaration of Trust**.

RETIREMENT SAVINGS PLAN - APPLICATION

The Contract Number on all forms will be completed by the Foundation office.

Complete the **Annuitant** information section.

Pension Lock-In is only used if you are transferring a "Locked-In" pension into the RSP, contact us for details if this is applicable.

If your spouse is contributing to the RSP, complete the Contributor section.

Read the **Authorization** and the **Please Review Carefully** sections at the bottom of the Application form and sign at the Annuitant's Signature to indicate your authorization and agreement.

DESIGNATION OF BENEFICIARY

Check "Retirement Savings Plan" at top of form. Complete first section excluding Client No, Contract No, and Concentra Financial Use area.

Print Annuitant's name and address (town), and complete **Primary Beneficiary** section - usually a spouse and/or children. Complete **Alternate Beneficiary** area only if applicable.

Sign and date at the **Annuitant's Signature** section and have it witnessed by someone other than a spouse or beneficiary.

SUBSCRIPTION FORM

If cash purchase, check first box, and the number of Units (the number of Units equals the dollar amount divided by 10).

If "Transfer-In," check the second box at the top of form.

Complete name, address, etc.

Check the appropriate box indicating payment method or authorization.

RRSP (Registered Retirement Savings Plan), RPP (Registered Pension Plan), DPSP (Deferred Profit Sharing Plan).

Check the box indicating the Atlantic Baptist Foundation Retirement Savings Plan.

Sign at "Subscriber's signature" and date.

RETIREMENT SAVINGS PLAN - DEPOSIT FORM

Complete the Annuitant **Personal Information**.

Complete **Contributor Information** details if it is a spousal contribution.

Check the appropriate box in the **Deposit Detail** section.

Do not insert the Deposit Date. This will be completed at the Foundation office.

If a "cash purchase" insert the Deposit Amount.

If by "Transfer-In," do not complete Deposit Amount.

Sign and date at the **Annuitant's Signature** section at the bottom of the form.

DIRECT TRANSFER-IN

To transfer an existing RRSP from another institution, complete **Part I - Annuitant Request**. Insert details of your existing RRSP Transferor Institution - name, address, phone number. Complete the Contract or Plan # from Transferor Institution.

If possible, attach a copy of the latest RRSP statement.

Check "Full Transfer" and "From: RRSP." (Transfers take from 4 to 6 weeks to complete.)

Check "Self Directed RSP 145-682" and "in cash" (all transfers are considered as cash).

If from RPP/DPSP, check the appropriate box.

Date and sign as Annuitant.

Do not complete Part II.

STATUS CHANGE FORM (Contact the office for this form)

(This form is used only if there is a change in name, address, telephone number, or to change existing banking information or authorization, or to set up electronic banking if you decide to contribute on a monthly, quarterly, or semi-annual basis after the RRSP is set up.)

Complete the first section, **Personal Detail** - contract number, account type, and name.

Complete the second section, **Pre-Authorized Chequing and Banking Authorization**, only if the changes are to banking information and/or instructions.

Complete the third section, **Non Financial Changes**, if applicable.

It is not necessary to complete the rest of the form.

ADDITIONAL FORMS

"Locked-In" regulations for RRSP plans in some Provinces may differ and an additional form may be required. If so, the form may be requested from The Foundation office if it is not included in your package.

COMPLETED FORMS

Send completed forms to: Atlantic Baptist Foundation
35 Atlantic Baptist Ave
Moncton, NB E1E 4N3

Print and keep copies for your files. If you require assistance in completing the forms, or if you need more information, please use the RRSP / RRIF Toll Free number:

1-888-263-1444

If no answer, leave your name, number, and a message, and you will be contacted as promptly as possible.

ADDITIONAL INFORMATION

SAVINGS ACCOUNT - (Non Registered)

The Foundation has a Savings Account Plan that pays a very competitive rate of interest. The savings are not locked-in and can be withdrawn partially or completely without penalty at any time. There are no administrative fees. It is an excellent way of building your savings for a special purpose.

RETIREMENT INCOME FUND (RRIF)

When you are ready to retire and convert your RRSP or Pension into a RRIF, please consider the Atlantic Baptist Foundation Retirement Income Fund plan and compare the benefits.

Thank you for using our financial services.

**Atlantic Baptist Foundation
35 Atlantic Baptist Ave
Moncton, NB E1E 4N3**

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