Concentra®

Self-Directed Deposit Form

Contract Number

Personal Information

Annuitant (last name, first name)

Contributor Information

Do not combine spousal and non-spousal deposits into the same contract.

Is this a spousal deposit/transfer? ☐ Y - Yes ☐ N - No

If "Yes", complete the following:

Contributor (last name, first name)

Contributor's SIN

Deposit Detail

Are funds subject to pension lock-in? ☐ Yes ☐ No If Yes _____ (jurisdiction)

Transaction Code

☐ Cash Contribution, HBP/LLP Repayment, or Transfer from RRIF

☐ Contribution in kind (complete Securities Deposits below)

☐ Home Buyers' Plan Cancellation

☐ Transfer from RRSP/RPP/DPSP/TFSA

☐ Transfer from a Deceased Spouse's RRSP/RRIF/TFSA

☐ Transfer from a Retiring Allowance/Severance Pay

Deposit Date (MM/DD/YYY)

Deposit Amount $

Securities Deposits

(Description of Securities)

_____ $ _____

_____ $ _____

_____ $ _____

_____ $ _____

_____ Date _____ _____

Accepted by Authorized Agent Annuitant's Signature

_____

Agent Name

_____

Agent Telephone

302-459 (01/17) Original - Concentra Trust Copy - Client Copy - Agent

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