



Please return completed form with cheque, and any applicable attachments, to the Canadian Worker Co-operative Federation.

# Direct Transfer-In

Indicate

RRSP

TFSA

## Part I: Annuitant Request

\_\_\_\_\_  
(name) (social insurance number) (telephone)

\_\_\_\_\_  
(address)

\_\_\_\_\_  
(Transferor Institution name, address and phone number)

\_\_\_\_\_  
(Contract or Plan #) (Deposit #) (Maturity Date, if applicable)

List In Detail with the full name or official code for any securities, mutual funds etc. and specific amounts which are to be sold to fund the transfer request. Include amounts required to cover any of the transferring institutions transfer fee.

\_\_\_\_\_

**PLEASE TRANSFER:** \_\_\_ all of the property (in cash), OR, \_\_\_ lump **Net Sum** of \$ \_\_\_\_\_ (in cash)

<b>FROM:</b> ___ RRSP	<b>TO:</b> Contract # _____	<b>Specimen Plan</b>
___ RRSP Spousal		
___ RRIF	<b>Canadian Worker Co-op Federation</b>	___ SD RSP 145-698
___ RPP	<b>#1, 41 Aberden St. Kentville, NS</b>	
___ DPSP	<b>B4N 2M9</b>	___ SD TFSA 145-2416
___ Retiring Allowance		
___ TFSA		

If from RPP/DPSP: \_\_\_ I am the member, OR, \_\_\_ the beneficiary spouse, OR, \_\_\_ former spouse due to marriage breakdown

\_\_\_\_\_

Date: \_\_\_\_\_ Annuitant Signature: \_\_\_\_\_ OR, \_\_\_ see attached letter

Signature Guaranteed by: \_\_\_\_\_

Certified by: \_\_\_\_\_ 902-678-1683 \_\_\_\_\_, Canadian Worker Co-operative Federation  
(Authorized Agent name and phone number) (Transferee Institution)

## Part II: Transfer Institution

**Amount transferred:** \$ \_\_\_\_\_ (Transferor to issue T4RIF for transfers from RRIF to RRSP, or T4A for Retiring Allowance transfer.)

RRSP Spousal contributions: \_\_\_ No \_\_\_ Yes...contributor name: \_\_\_\_\_ SIN: \_\_\_\_\_

Locked in Funds: The CWCF SD RSP does not accept Locked in Funds

\_\_\_\_\_  
(Date) (Authorized Signature of Transferor Institution) (Contact phone number)

DTI-CWCF (10/03)

**Produce two copies, one for Annuitant, one to Transferor Institution**