

Services for this plan are provided by The Great-West Life Assurance Company (Great-West). The policy is issued by London Life Insurance Company, a subsidiary of Great-West.

**EMPLOYER/PLAN SPONSOR INFORMATION**

Name of employer/plan sponsor	Policy/plan number
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**MEMBER INFORMATION (please print)**

Last name	Initial	First name	Certificate/Social insurance number
			- -

Business telephone number ( ) - Ext.	Home telephone number ( ) -
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Member's home address (street address, city, province and postal code)

**IMPORTANT**

- To request a withdrawal, or transfer complete **Part A**
- To request a withdrawal from your RSP under the Homebuyer's Program – complete **Part B**
- To request a withdrawal from your RSP under the Lifelong Learning Program – complete **Part C**

**NOTE: Due to potential market fluctuations, withdrawal requests for specific dollar amounts from a variable fund (rather than a % of the fund) will be limited to 90% of the estimated value.**

**PART A - CASH WITHDRAWAL OR TRANSFER TO ANOTHER PLAN**

Withdraw funds from my:  RSP\*  RPP Voluntary Contributions  DPSP  NRSP\*  TFSA\*

Consent may be required from your employer – check with your plan administrator for details. **Part H** must be completed if consent is required.

**Cash refund**

RSP / RPP Voluntary Contributions / DPSP - Appropriate tax will be deducted and the refund is taxable income in the year of the withdrawal.

**Amount requested**

- the total value of the funds available  
\*if funds are being withdrawn from your RSP, NRSP or TFSA, should your plan remain open?  
 yes, I will continue to participate  no, I will not be making any further contributions

- \$ \_\_\_\_\_  before applicable tax is withheld  after applicable tax is withheld  
Any partial withdrawal will be made from investments in accordance with the Administrative Rules and the Investment Rules.

If employee is Status Indian, provide 10 digit Indian Registry No. \_\_\_\_\_

Have all or a portion of the contributions made on behalf of this employee been in respect of salary earned on a Reserve? If so, Employer/Plan Sponsor must complete **Part H**.

- No contributions made have been in respect of salary earned on a Reserve  
 All contributions made have been in respect of salary earned on a Reserve  
 Some of the contributions made have been in respect of salary earned on a Reserve. The percentage of the employment duties the employee performed on the Reserve was \_\_\_\_\_%

**Payment Method**

- Cheque  
 Deposit to Bank Account – attach Void Cheque, or complete the following:  
Transit (5 digits) \_\_\_\_\_ Bank Code (3 digits) \_\_\_\_\_ Account # \_\_\_\_\_

**Direct transfer to another plan**

**Amount requested**

- the total value of the funds available  
\*if funds are being withdrawn from your RSP, NRSP or TFSA should your plan remain open?  
 yes, I will continue to participate  no, I will not be making any further contributions

- \$ \_\_\_\_\_  
Any partial withdrawal will be made from investments in accordance with the Administrative Rules and the Investment Rules.

**Request for member withdrawal (continued)**

For a transfer to another plan, you must also submit a partially completed *Transfer authorization* form with the details of your new plan.

**PART B – HOMEBUYER’S WITHDRAWAL – RSP PLANS ONLY**

Amount requested \$ \_\_\_\_\_

Any partial withdrawal will be made from investments in accordance with the Administrative Rules and the Investment Rules.

**Payment Method**

- Cheque
- Deposit to Bank Account – attach Void Cheque, or complete the following:  
 Transit (5 digits) \_\_\_\_\_ Bank Code (3 digits) \_\_\_\_\_ Account # \_\_\_\_\_

Closing date of your purchase \_\_\_\_\_

Completed Canada Revenue Agency form T1036 completed and signed must be attached to this form.

**PART C – LIFELONG LEARNING WITHDRAWAL – RSP PLANS ONLY**

Amount requested \$ \_\_\_\_\_

Any partial withdrawal will be made from investments in accordance with the Administrative Rules and the Investment Rules.

**Payment Method**

- Cheque
- Deposit to Bank Account – attach Void Cheque, or complete the following:  
 Transit (5 digits) \_\_\_\_\_ Bank Code (3 digits) \_\_\_\_\_ Account # \_\_\_\_\_

Canada Revenue Agency form RC96 with Area 1 completed and signed must be attached to this form.

**PART D – TRANSFER OF ELIGIBLE PROCEEDS UNDER A QUEBEC SIMPLIFIED PENSION PLAN**

Please transfer the following amount to another registered plan:

- the total value of my eligible funds under the Simplified Pension Plan (Québec)
- \$ \_\_\_\_\_ of my eligible funds under the Simplified Pension Plan (Québec)

A form T2151 with Area 1 completed must be attached to this form.

**PART E – SPECIAL INSTRUCTIONS**

\_\_\_\_\_  
\_\_\_\_\_

**PART F – MEMBER SIGNATURE**

I request that Great-West Life proceed with the withdrawal(s) and/or transfer(s) as outlined in this form.

Date \_\_\_\_\_ Member’s signature \_\_\_\_\_

**PART G – CONSENT OF IRREVOCABLE BENEFICIARY**

**This section must be completed if you have named an irrevocable beneficiary, otherwise proceed to Part H.**  
I agree to the withdrawal(s) and/or transfer(s) as selected by the member above and I hereby transfer to the member all my rights in the above described policy/plan to the extent of such withdrawal(s) and/or transfer(s).

Date \_\_\_\_\_ Signature of irrevocable beneficiary (must be age of majority)

Date \_\_\_\_\_ Signature of witness (must be age of majority and not the plan member)

**PART H – EMPLOYER/PLAN SPONSOR SIGNATURE**

This section must be completed for in-service withdrawals where the plan requires employer consent prior to the withdrawal being made.

Date \_\_\_\_\_ Signature of employer/plan sponsor by authorized person.