

TRANSFER AUTHORIZATION FOR REGISTERED INVESTMENTS

(RRSP, LIRA, LRSP, RRIF, LRIF, LIF, RLIF, RLSP, PRIF, TFSA)



- This form can be used for transferring the registered plans listed above except (1) RRIF to RRSP transfers, (2) RRIF or RRSP to TFSA transfers, (3) TFSA to RRIF or RRSP transfers, (4) transfers due to death and (5) transfers due to marital breakdowns.
- Data entered on this form may be scanned and stored electronically. Please print neatly to ensure completeness, accuracy and machine-readability.

A: Client Identification

Account/Policy Holder Last Name	First Name	Initial(s)	Social Insurance Number ()
Address			Home Telephone Number ()
City	Province	Postal Code	Business Telephone Number

B: Receiving Institution Information

MACKENZIE FINANCIAL CORPORATION – (AS AGENTS FOR B2B Trustco)			REGISTERED PLANS DEPARTMENT
Receiving Institution Name			Contact Name
180 QUEEN STREET WEST			(800) 387-0614
Address			Telephone Number
TORONTO	ONTARIO	M5V 3K1	(866) 766-6623
City	Province	Postal Code	Fax Number
Group Plan Number (if applicable)		Client Account/Policy Number	

For use by Mutual Fund Brokers/Dealers only

Dealer Name	Dealer Number	Dealer Account Number
Agent Name	Agent Number	Business Telephone Number
		Business Fax Number


- Registered Type:**
- RRSP RRIF LIRA
 Spousal RRSP Spousal RRIF LIF
 LRSP LRIF RLIF
 RLSP PRIF TFSA

Investment Instructions:

Investment Name	Symbol	%/ \$ Amount

Locked-In Confirmation

Mackenzie Financial Corporation, as agent for B2B Trustco, agrees to administer all locked-in funds transferred under this transfer authorization in accordance with the governing pension legislation indicated in Section E below. Any subsequent transfer of these locked-in funds to another trustee or financial institution will be made only to another registered plan, which will continue to be administered in accordance with the requirements indicated below. No transfer of locked-in funds will be permitted unless the receiving plan is appropriately registered and in compliance with the applicable pension legislation, regulations and the *Income Tax Act (Canada)*.


 Authorized B2B Trustco Signing Officer/Agent

C: Client Direction to Relinquishing Institution

Relinquishing Institution Name	Group Plan Number (if applicable)
Address	Client Account/Policy Number
City	Province
	Postal Code

- Transfer:** (check one box only for asset transfer instructions and an additional box if asset list is attached)
- All in kind (as is) Cash balance only as at date of transfer by Relinquishing Institution Partial*; see list below or check here if list attached
 All in cash* All assets*, but mixed in cash and in kind; see list below or check here if list attached
- *Please refer to statement in bold in Client Authorization section below.*

	Investment Amount	Symbol and/or Certificate Number or Policy No	Investment Description
<input type="checkbox"/> In Kind <input type="checkbox"/> In Cash <input type="checkbox"/> Shares/Units <input type="checkbox"/> Dollars			
<input type="checkbox"/> In Kind <input type="checkbox"/> In Cash <input type="checkbox"/> Shares/Units <input type="checkbox"/> Dollars			

D: Client Authorization

I hereby request the transfer of my account and its investments as described above.

***WHERE I HAVE REQUESTED A TRANSFER IN CASH, I AUTHORIZE THE LIQUIDATION OF ALL OR PART OF MY INVESTMENTS AND AGREE TO PAY ANY APPLICABLE FEES, CHARGES OR ADJUSTMENTS.**

Signature of Account Holder	Date (DD/MM/YY)	Signature of Irrevocable Beneficiary/Former Spouse (if applicable)	Date (DD/MM/YY)
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E: For Use By Relinquishing Institution Only

Registered Type: RRSP LIRA LRSP RRIF: Qualified Non-qualified
 PRIF RLIF RLSP TFSA LRIF LIF: Federal LIF Old LIF New LIF

Spousal Plan: No Yes If Yes: Last Name First Name Initial Social Insurance Number

Locked-In: No Yes If yes, locked-in confirmation attached Locked-in funds: \$ _____ Governing legislation _____

The default is "unisex;" if sex-distinct For Plans governed by Manitoba PBA, if Death Benefit waiver attached
 If spouse waiver/consent form attached Assets derived from a PRPP
 For LIF governed by Manitoba PBA: Is the transferor aware of a one-time transfer under section 21.4 of the Manitoba PBA: No Yes

For LIF governed by AB and ON and MB and LRIF governed by NL and ON:

Plan value on January 1: \$ _____ Transfers out in current year: \$ _____

Transfers in current year: \$ _____ Income payments in current year: \$ _____

Current year's investment earnings: \$ _____

Original (creation) date of plan (LRIF only): _____
Date (DD/MM/YY)

Contact Name	() Telephone Number	() Fax Number
Authorized Signature	Date (DD/MM/YY)	