



uOttawa

L'Université canadienne  
Canada's university

### DIRECT TRANSFER FORM

**Applicant:** To have funds transferred to your RRSP or RRIF, complete Part 1 only and return to the University of Ottawa with your option decision sheet.

**Financial Institution:** Once funds are transferred, complete Part 3.

#### Part I - Applicant

_____	_____	_____
Last Name	First Name	Employee number
_____		_____
Address		Social insurance number

#### Section A - Transfert from the University of Ottawa Pension Plan

- I am a member of the University of Ottawa Pension Plan.
- I am a beneficiary spouse or former spouse requesting a transfer because of the death of a University of Ottawa Pension Plan member.
- I am the RPP member's spouse or former spouse requesting a transfer because of a marriage breakdown.

RPP registration number: 683177

University of Ottawa, 550 Cumberland, Room 019, Ottawa, On K1N 6N5  
Attention: Pension Department

#### Section B - Description of amount to be transferred

- Please transfer my whole entitlement under the plan identified in Part A.

#### Section C- Identification of the RRSP, RRIF or RPP the funds are being transferred to

- Please transfer the RPP single amount to my registered retirement savings plan (RRSP).

_____	_____
Individual plan number	Name of plan and approved specimen plan number

- Please transfer the RPP single amount to my Registered retirement income fund (RRIF).

_____	_____
Employer's name	Name of fund and approved specimen fund number

- Please transfer the RPP single amount to my account as a beneficiary under this RPP.

_____	_____
Employer's name	CRA RPP registration number

Financial institution: \_\_\_\_\_

Address: \_\_\_\_\_

Number	Street	
_____	_____	
City	Province	Postal code

_____	_____
Applicant signature	Date

#### Part II - University of Ottawa certification (To be completed by the University of Ottawa)

- 1. We have transferred \_\_\_\_\_ \$ according to one of sub-sections 147.3(1)-(8) of the ITA.
- 2. No lock-in provision applies.
- 3. A lock-in provision applies to \_\_\_\_\_ \$ of the amount we transferred from the rpp identified in section B of Area 1 under the Pension Benefits Standards Act or a provincial pension benefits act. ONTARIO Does not apply
- 4. We did not transfer \_\_\_\_\_ \$ of the RPP single amount indicated in item 1 according to one of the following subsections: 147.3(1) to (7). We will report this amount as the applicant's income on a T4A slip.

**I certify that the information given on this form is, to the best of my knowledge, correct and complete.**

Transferor: University of Ottawa Pension Plan

_____	_____
Pension Officer Signature	Date

#### Part III - Financial institution certification (To be completed by the financial institution)

Please complete and send one copy to the applicant and one copy to:  
University of Ottawa, 550 Cumberland, Room 019, Ottawa, On K1N 6N5

- 1. We have received \_\_\_\_\_ \$ and credited it to the applicant's:
  - RRSP identified in Part 1
  - RRIF identified in Part 1
- 2. The Plan to which the single amount has been transferred is registered under the Income Tax Act.
- 3. We will issue a receipt for the amount indicated in item 3 of Part 2.

*I certify that the informatin given on this form is, to the best of my knowledge, correct and complete.*

_____	_____
Name of financial institution	Authorizing person's title

_____	_____	_____
Signature	Date	Telephone number