Optimize Wealth Management

FORMS RELATED TO FEDERAL LOCKED-IN PLANS

Form 1 and Instructions for Form 1 – Attestation regarding withdrawal based on financial hardship

- This form must be filled out if you wish to make a financial hardship withdrawal.

Form 2 - Attestation Regarding Spouse/Common-Law Partner

- If the planholder has a spouse or common-law partner at the time the request is made, the spouse or common-law partner must indicate his or her consent by completing and signing the attached Federal Form 2.

Form 3 - Attestation of Total Amount Held in Federally Regulated Locked-in Plans

- Any planholder who meets the age and small total balance requirements of the provision must disclose the total of all their federally regulated LIFs, LRSPs, RLIFs & RLSPs, with all financial institutions, on Form 3 and the total must be less than the limit of 50% of the YMPE.