



Form 3.01 - Waiver by Spouse or Common-Law Partner (Reduced Life Expectancy)

- This waiver should be completed when funds are to be unlocked for a member of the pension plan or an owner of a LIRA, LIF, or annuity due to reduced life expectancy.

Form 3.02: Waiver by Spouse or Common-Law Partner (General)

- This waiver should be completed when the spouse or common-law partner waives all the rights they have in the LIRA, LIF or prospective annuity.

Form 3.5 - Waiver of Spouse or Common-Law Partner

- This waiver must be completed when funds are to be unlocked for a member of the pension plan or an owner of a LIRA, LIF, or Annuity who is neither a resident of Canada nor a Canadian Citizen.

Form 3.6 - Request for Withdrawal from a Locked-in-Retirement Account (LIRA)

- This form is completed and filed with the financial institution for the unlocking of a small LIRA.

Form 3.7 - Consent of Spouse or Common-Law Partner to Withdraw from a Locked-in Retirement Account (LIRA)

- This form must be completed if the owner requesting the unlocking of funds from a small pension or LIRA has a spouse or common-law partner.

Form 3.8 - Consent of Spouse or Common-Law Partner to Unlock Small Pension Balance

- This form gives consent of spouse or common-law to unlock small pension balance.

