

- An application may only be made in respect of a Locked-in Retirement Account that is Locked-in under the Alberta Employment Pension Plans Act and Regulations.
- Applicants must be at least 50 years old.
- This form cannot be used for transfers from one Financial Institution to another Financial Institution.

1 APPLICANT INFORMATION

Client's first and last name

Account Number

2 CONSENT OF PENSION PARTNER

An original owner with a pension partner cannot unlock 50% of the funds unless the pension partner signs a waiver. The waiver will be required at the time when the Original Owner is choosing to unlock the funds, if the funds in a LIRA belong to an Original Owner who had a pension partner at the time the funds were transferred to the Locked-in and that person is still that Original Owner's Pension Partner.

- I do not have a pension partner
- I have a pension partner (Please have Alberta Government Form 14 completed and attach to this application)

3 UNLOCKING OPTIONS

a) Transfer to my RSP/RIF account

Transfer to my RSP or to my RIF account No. _____

b) Pay in cash

*The unlocked amount taken in cash is subject to any applicable withholding taxes

Deposit the net amount into my brokerage account No. _____

Make an Electronic Fund Transfer (EFT) _____
Please attach void cheque

Send a cheque _____
Complete mailing address

APPLICANT'S STATEMENT

The application will be void and the transfer will not be made unless the completed application includes the Pension Partner waiver, if applicable.

I declare that on the date I sign this application all the information contained in this application and the documents that accompany this application are accurate and complete.

Furthermore, I understand that no additional unlocking will be permitted from the above account.

Dated at _____ in the province of _____ this _____ day of _____ 20 _____
Municipality Month Year

(Signature of the Applicant)