

FORMS related to ALBERTA LOCKED-IN PLANS

- Form 7: Pension Partner Waiver to Permit Up to 50% Unlocking From a Pension Plan on Establishment of a Life Income Type Benefit Account or Life Income Fund
- Form 10: Pension Partner Waiver to Establish a Life Income Fund from a Locked in Retirement Account
- Form 11: Pension Partner Waiver of Entitlement to a 60% Joint and Survivor Annuity from a Locked in Account
- Form 12: Pension Partner Waiver of Entitlement to a Death Benefit From a LIRA
- Form 13: Pension Partner Waiver to Permit Unlocking From a Locked in Product Due to Shortened Life Expectancy or Non Residency
- Form 14: Pension Partner Waiver to Permit Up to 50% Unlocking from a Locked in Retirement Account on Establishment of a Life Income Fund or Transfer to a Life Income Type Benefit Fund
- Form 15: Pension Partner Waiver to Establish a Life Income Fund from a Pension Plan
- Form 16: Pension Partner Waiver of Entitlement to a Death Benefit After Establishment of a Life Income Fund
- Form 23: Application to Unlock Funds due to Financial Hardship

Click on the link below to get the forms from Alberta government Website (Insurance, pensions and financial institutions).

<https://www.alberta.ca/pensions-forms.aspx>