

FORM 3  
(Subsection 18(3))

APPLICATION TO TRANSFER PENSION BENEFIT CREDIT UNDER SECTION 26 OF THE  
PENSION BENEFITS STANDARDS ACT, 1985

**1. Applicant**

I, (insert name) \_\_\_\_\_, am a (member)(survivor of a member (give name of  
the member \_\_\_\_\_ )) of the registered pension plan known as  
\_\_\_\_\_ and I apply to

**2. Transfer or Purchase** (*check one*)

- (a)\_\_\_\_\_ transfer my pension benefit credit to a locked-in registered retirement savings plan of the kind described in section 20 of the *Pension Benefits Standards Regulations, 1985*;
- (b)\_\_\_\_\_ transfer my pension benefit credit to a life income fund of the kind described in section 20.1 of the *Pension Benefits Standards Regulations, 1985*;
- (c)\_\_\_\_\_ transfer my pension benefit credit to a restricted life income fund of the kind described in section 20.3 of the *Pension Benefits Standards Regulations, 1985*;
- (d)\_\_\_\_\_ use my pension benefit credit to purchase an immediate life annuity of the kind described in section 21 of the *Pension Benefits Standards Regulations, 1985*;
- (e)\_\_\_\_\_ use my pension benefit credit to purchase a deferred life annuity of the kind described in section 21 of the *Pension Benefits Standards Regulations, 1985*; or
- (f)\_\_\_\_\_ transfer my pension benefit credit to a pension plan of which I am currently a member, which is known as \_\_\_\_\_ .

**3. Signatures**

Signature of member (or survivor of member) \_\_\_\_\_

Name of member (or survivor of member) \_\_\_\_\_

Signature of witness \_\_\_\_\_

Name of witness \_\_\_\_\_

Address of witness \_\_\_\_\_

Signed at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ .

**4. Confirmation of the request received by the financial institution for (check one)**

- (a)\_\_\_\_\_ a transfer of the funds to a locked-in registered retirement savings plan of the kind described in section 20 of the *Pension Benefits Standards Regulations, 1985*;
- (b)\_\_\_\_\_ a transfer of the funds to a life income fund of the kind described in section 20.1 of the *Pension Benefits Standards Regulations, 1985*;
- (c)\_\_\_\_\_ a transfer of the funds to a restricted life income fund of the kind described in section 20.3 of the *Pension Benefits Standards Regulations, 1985*;
- (d)\_\_\_\_\_ the use of the funds to purchase a deferred life annuity of the kind described in section 21 of the *Pension Benefits Standards Regulations, 1985*; or
- (e)\_\_\_\_\_ the use of the funds to purchase an immediate life annuity of the kind described in section 21 of the *Pension Benefits Standards Regulations, 1985*, the funds of which shall be only used to purchase another immediate life annuity that meets the requirements of those Regulations.

**5. Signatures**

Signature of applicant \_\_\_\_\_

Name of applicant \_\_\_\_\_

Signature of officer of financial institution \_\_\_\_\_

Name of financial institution \_\_\_\_\_

Signed at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ .