t 1 – Applicar	definitions, see the last page of this form. Legislative re nt				
	Name	Social ir	surance number		Telephone
		Address			
Please transfer \$	from the (tick on	e box)	RRSP	RRIF	identified below.
	Name of RRSP issuer or RRIF carrier		Plan	or fund number an	d name
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Please tra	ansfer the amount to the following RRIF:		RRSP r	number and name	
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Privacy Act, personal information bank numbers CRA PPU 005 and CRA PPU 226

Canadä

	Name	Social insurance number Telephone
Please transfer \$	from the (tick c	Address one box) RRSP RRIF identified below.
N	lame of RRSP issuer or RRIF carrier	Plan or fund number and name
	Address of R	RSP issuer or RRIF carrier
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Name of RRSP issue	r, RRIF carrier, SPP or PRPP administrator or annuity is	3suer
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Date		oplicant's signature Or See letter attached
rt 2 – Transferee		
	nder the RRSP, RRIF, SPP, or PRPP identified in	to buy an annuity described in clause 60(I)(ii)(A), or we will credit it to the n item 4 above. The RRSP, RRIF, SPP, or PRPP conforms, or will conform,
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Authorized person's signature

Privacy Act, personal information bank numbers CRA PPU 005 and CRA PPU 226

(Vous pouvez obtenir ce formulaire en français à www.arc.gc.ca/formulaires.) Copy 2 – For the annuitant (all areas completed). Do not attach this copy to your income tax and benefit return. T2030 E (14)

Date

Name of RRSP issuer or RRIF carrier         Address of RRSP issuer or RRIF carrier         one box.       I am the annuitant under the RRSP.         I am the annuitant under the RRSP.       I am         one box.       The amount is the whole value of my RRSP annuity       The         identified above.       The amount is the partial value of my RRSP annuity       The         identified above.       The amount is the partial value of my RRSP annuity       The         one box and complete the line that applies.       Please transfer the amount to the following RRSP:	RSP RI Plan or fund rrier n the annuitant under	s payment under my RRIF r and name and name
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Address		r and name
		– or See letter attache
Date Applicant's signature     - Transferee		
will accept the direct transfer of the above amount. We will use it to buy an annuity des nuitant/member under the RRSP, RRIF, SPP, or PRPP identified in item 4 above. The F following specimen: Specimen plan or fund number and na plan or fund is registered under the <i>Income Tax Act</i> . If the plan or fund is not registered d identification in item 4 above, and add or correct information as necessary.	RRSP, RRIF, SPP, o	r PRPP conforms, or will conform,
Transferee's name		
Date Authorized person's signature		
- Transferor: Issue a T4RSP or T4RIF slip for the transfer, and state that it i	is a subparagraph	60(l)(v) transfer.
have transferred \$ from the RRSP or RRIF identified	d in item 1 to the tran	sferee identified in item 4.
Did the annuitant's/member's spouse or common-law partner contribute to the RRSP in rear of this transfer or in any previous year?	the Yes	No Does not app
Does the RRIF include amounts that were transferred from an RRSP to which the annu nember's spouse or common-law partner has contributed?	uitant's/ Yes	No Does not app
Name of spouse or common-law partner	Social insurance	a number of anounce or common low por
	_	number of spouse or common-law par
e transfer from a "Qualifying RRIF", as defined under "Definitions" on the last page of t ertify that the information given on this form is correct and complete.		No Does not ap
Transferor's name		
		_
Date Authorized person's signature		
Date Authorized person's signature – <b>Transferee:</b> Issue a receipt for tax purposes indicating the amount of the tr	ransfer under subp	paragraph 60(I)(v).

Privacy Act, personal information bank numbers CRA PPU 005 and CRA PPU 226

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art 1 – Applicant	itions, see the last page of this form. Legislative r	eferences on this form are to the Incom	
	Name	Social insurance number	Telephone
		Address	
Please transfer \$	from the (tick o	ne box) RRSP F	RRIF identified below.
N	ame of RRSP issuer or RRIF carrier	Plan or fu	nd number and name
	Address of R	RSP issuer or RRIF carrier	
Tick one box.	I am the annuitant under the RRSP.	I am the annuitant unde	er the RRIF.
Tick one box.	The amount is the whole value of my RRSP identified above.	annuity The amount is an excess identified above.	ss payment under my RRIF
	The amount is the partial value of my RRSP identified above.	annuity	
Tick one box and com	nplete the line that applies.		
Please transfe	r the amount to the following RRSP:		
Please transfe	r the amount to the following RRIF:	RRSP numb	er and name
	r the amount to my account as a member of	RRIF numbe	er and name
L the following S	PP: 	SPP numbe	er and name
the following P		PRPP numb	er and name
		Address	Or See letter attached
Date	Ар	Address Dicant's signature	— or See letter attached
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Authorized person's signature

*Privacy Act*, personal information bank numbers CRA PPU 005 and CRA PPU 226 (Vous pouvez obtenir ce formulaire en français à **www.arc.gc.ca/formulaires**.)

Date

Copy 4 – For the transferor, following receipt from the transferee of all copies – Parts 1, 2, and 4 completed by transferee, and Part 3 by the transferor.

# When to use this form

You can use this form to ask:

- your RRSP issuer to transfer the value of your RRSP annuity to another RRSP, a RRIF, an SPP, or a PRPP or to transfer it to buy another annuity;
- your RRIF carrier to transfer an excess amount to your RRSP, SPP, or PRPP or to buy an annuity.

## How to complete this form

**Part 1** – The annuitant/member who is requesting the direct transfer (the applicant) completes and signs Part 1 and gives all copies of the form to the RRSP or annuity issuer, the RRIF carrier or the SPP or PRPP administrator who will be receiving the transfer (the transferee). If the transferee has a signed letter from the applicant requesting the direct transfer, the transferee can complete and sign Part 1 for the applicant and attach a copy of the letter.

**Part 2** – The transferee completes and signs Part 2 and sends all copies of the form to the RRSP issuer or RRIF carrier who will be transferring the amount (the transferor).

**Part 3** – The transferor completes and signs Part 3. The transferor keeps copy 4, and sends copies 1, 2, and 3 to the transferee, along with the amount being transferred.

**Part 4** – The transferee completes and signs Part 4 of copies 1, 2, and 3. The transferee keeps copy 3, returns copy 1 to the transferor, and gives copy 2 to the applicant.

## How to report the amounts transferred

Transferor: The transferor does not withhold tax on amounts that are transferred using this form.

An RRSP issuer who is transferring the value of an RRSP annuity reports the value on a T4RSP slip for the year of the transfer. A RRIF carrier who is transferring a RRIF amount reports the amount on a T4RIF slip for the year of the transfer. The SPP or PRPP administrator report the amount transferred on a T4A slip for the year of the transfer.

**Transferee:** The RRSP issuer, RRIF carrier, SPP or PRPP administrator, or annuity issuer who is receiving the transfer, issues a receipt to the applicant.

**Individual:** The applicant attaches a copy of the T4RSP slip or T4RIF slip, as well as a copy of the receipt, to his or her income tax and benefit return for the year of the transfer. The applicant includes the amount shown on the T4RSP slip or T4RIF slip in taxable income, and deducts the amount shown on the receipt from taxable income.

#### Transfer from spousal or common-law partner RRSP or RRIF:

If the transfer is from a spousal or common-law partner RRSP or RRIF, the applicant may also have to complete Form T2205, *Amounts from a Spousal or Common-law Partner RRSP, SPP, or RRIF to Include in Income for* \_\_\_\_\_.

- The applicant will have to complete Form T2205 if all of the following conditions exist:
  - the applicant's spouse or common-law partner made a contribution to an RRSP of the applicant in the year of the transfer or in either of the two preceding years;
  - the applicant is transferring the amount to buy an annuity that can be commuted in three years, or earlier; and
  - either box 7a) or 7b) of Part 3 is ticked **yes**.

#### Definitions

Acronyms – the following is a list of the acronyms we use: PRPP – pooled registered pension plan RRIF – registered retirement income fund RRSP – registered retirement savings plan SPP – specified pension plan

Administrator - the person, organization, or institution that is responsible for administering an SPP or a PRPP.

Annuitant - the person who is entitled to receive payments from an RRSP or a RRIF.

**Common-law partner** – a person who is not your spouse, with whom you are living in a conjugal relationship, and to whom at least one of the following situations applies. He or she:

a. has been living with you in a conjugal relationship, and this current relationship has lasted at least 12 continuous months; **Note** 

In this definition, 12 continuous months includes any period you were separated for less than 90 days because of a breakdown in the relationship.

- b. is the parent of your child by birth or adoption; or
- c. has custody and control of your child (or had custody and control immediately before the child turned 19 years of age) and your child is wholly dependent on that person for support.

Excess amount - an amount in excess of the minimum amount payable each year from a RRIF.

**Member** – an individual (other than a trust) who holds an account under the plan and who is entitled to receive payments from an SPP or a PRPP.

**PRPP** – a retirement savings plan to which you and/or your participating employer can contribute. Any income earned in the PRPP is usually exempt from tax as long as it remains in the plan.

Qualifying annuity – an annuity described under clause 60(I)(ii)(A), including annuities:

- for the annuitant's life;
- for the lives jointly of the annuitant and the spouse or common-law partner; and
- with a guarantee period or for a term not greater than 90 years, minus the lesser of the annuitant's age or the spouse's or common-law partner's age.

Qualifying RRIF – a RRIF established before 1993 that has no property transferred or contributed to it after 1992, or any RRIF established after 1992 that contains only property transferred from another qualifying RRIF.

Spouse - a person to whom you are legally married.

**SPP** – a pension plan or similar arrangement that has been prescribed under the *Income Tax Regulations* as a "specified pension plan" for the purposes of the *Income Tax Act* (currently the Saskatchewan Pension Plan is the only arrangement prescribed to be a specified pension plan). Many of the rules related to RRSPs also apply to SPPs.

**Transferee** – the administrator, issuer, or trustee of the plan, or carrier of the fund **to** whom the amount is transferred. **Transferor** – the administrator, issuer, or trustee of the plan, or carrier of the fund **from** whom the amount is transferred.