

Services for this plan are provided by The Great-West Life Assurance Company (Great-West). The policy is issued by London Life Insurance Company, a subsidiary of Great-West.

EMPLOYER/PLAN SPONSOR INFORMATION

Name of employer/plan sponsor	Policy/plan number
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MEMBER INFORMATION (please print)

Last name	Initial	First name	Certificate/Social insurance number
Home telephone number () -			Daytime / alternate telephone number () -
Member's home address (street address, city, province and postal code)			

IMPORTANT

- To request a withdrawal, or transfer complete **Part A**
- To request a withdrawal from your RSP under the Homebuyer's Program – complete **Part B**
- To request a withdrawal from your RSP under the Lifelong Learning Program – complete **Part C**

NOTE: Due to potential market fluctuations, withdrawal requests for specific dollar amounts from a variable fund (rather than a % of the fund) will be limited to 90% of the estimated value.

PART A - CASH WITHDRAWAL OR TRANSFER TO ANOTHER PLAN

Withdraw funds from my: RSP* RPP Voluntary Contributions DPSP NRSP* TFSA*

Consent may be required from your employer – check with your plan administrator for details. **Part H** must be completed if consent is required.

Cash refund

RSP / RPP Voluntary Contributions / DPSP - Appropriate tax will be deducted and the refund is taxable income in the year of the withdrawal.

Amount requested

- the total value of the funds available
*if funds are being withdrawn from your RSP, NRSP or TFSA, should your plan remain open?
 yes, I will continue to participate no, I will not be making any further contributions

- \$ _____ before applicable tax is withheld after applicable tax is withheld

Any partial withdrawal will be made from investments in accordance with the Administrative Rules and the Investment Rules.

If employee is Status Indian, provide 10 digit Indian Registry No. _____

Have all or a portion of the contributions made on behalf of this employee been in respect of salary earned on a Reserve? If so, Employer/Plan Sponsor must complete **Part H**.

- No contributions made have been in respect of salary earned on a Reserve
 All contributions made have been in respect of salary earned on a Reserve
 Some of the contributions made have been in respect of salary earned on a Reserve. The percentage of the employment duties the employee performed on the Reserve was _____%

Payment Method

- Cheque
 Deposit to Bank Account – attach a pre-printed personalized void cheque, or complete the following:
Transit (5 digits) _____ Bank Code (3 digits) _____ Account # _____

Direct transfer to another plan

Amount requested

- the total value of the funds available
*if funds are being withdrawn from your RSP, NRSP or TFSA should your plan remain open?
 yes, I will continue to participate no, I will not be making any further contributions

- \$ _____

Any partial withdrawal will be made from investments in accordance with the Administrative Rules and the Investment Rules.

Request for member withdrawal (continued)

You must also submit a partially completed *Transfer authorization* form with the details of your new plan (contact the receiving institution to obtain this).

PART B – HOMEBUYER’S WITHDRAWAL – RSP PLANS ONLY

Amount requested \$ _____

Any partial withdrawal will be made from investments in accordance with the Administrative Rules and the Investment Rules.

Payment Method

- Cheque
- Deposit to Bank Account – attach a pre-printed personalized void cheque, or complete the following:
 Transit (5 digits) _____ Bank Code (3 digits) _____ Account # _____

Closing date of your purchase _____

You must also submit a Canada Revenue Agency form T1036 with this form.

PART C – LIFELONG LEARNING WITHDRAWAL – RSP PLANS ONLY

Amount requested \$ _____

Any partial withdrawal will be made from investments in accordance with the Administrative Rules and the Investment Rules.

Payment Method

- Cheque
- Deposit to Bank Account – attach a pre-printed personalized void cheque, or complete the following:
 Transit (5 digits) _____ Bank Code (3 digits) _____ Account # _____

You must also submit a Canada Revenue Agency form RC96 with this form.

PART D – TRANSFER OF ELIGIBLE PROCEEDS UNDER A QUEBEC SIMPLIFIED PENSION PLAN

Please transfer the following amount to another registered plan:

- the total value of my eligible funds under the Simplified Pension Plan (Québec)
- \$ _____ of my eligible funds under the Simplified Pension Plan (Québec)

You must also submit a T2151 form with this form.

PART E – SPECIAL INSTRUCTIONS

PART F – MEMBER SIGNATURE

I request that Great-West Life proceed with the withdrawal(s) and/or transfer(s) as outlined in this form.

Date _____ Member’s signature _____

PART G – CONSENT OF IRREVOCABLE BENEFICIARY

This section must be completed if you have named an irrevocable beneficiary, otherwise proceed to Part H.

I agree to the withdrawal(s) and/or transfer(s) as selected by the member above and I hereby transfer to the member all my rights in the above described policy/plan to the extent of such withdrawal(s) and/or transfer(s).

Date Signature of irrevocable beneficiary (must be age of majority)

Date Signature of witness (must be age of majority and not the plan member)

PART H – EMPLOYER/PLAN SPONSOR SIGNATURE

This section must be completed for in-service withdrawals where the plan requires employer consent prior to the withdrawal being made.

Date Signature of employer/plan sponsor by authorized person.