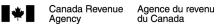


Canada Revenue Agence du revenu du Canada

DIRECT TRANSFER UNDER SUBPARAGRAPH 60(I)(v)

See the back of this form for instructions and definitions. Legislative references on this form are from the *Income Tax Act*.

Pa	rt 1 – Applicant					
	Name	Social insu	urance numb	er	_	Telephone
1.	Please transfer \$	Address from the (check one)	RRSP		or RRIF	identified below.
	Name of RRSP issuer or RRIF carrier			Plan	or fund numbe	er and name
•		ess of RRSP issuer or RRIF	carrier			
2.	Check one.					
	I am the annuitant under the RRSP.					
	I am the annuitant under the RRIF.					
3.	Check one.					
	The amount is the whole value of my RRSP annuity idea	ntified above.				
	The amount is the partial value of my RRSP annuity ide	ntified above.				
	The amount is an excess payment under my RRIF ident	tified above.				
4.	Check one and complete the line that applies.					
	Please transfer the amount to the following RRSP:					
	Please transfer the amount to the following RRIF:			RRSP ni	umber and nar	me
	Please transfer the amount to buy a qualifying annuity.			RRIF nu	ımber and nan	ne
	Name of RRSP issuer, RRIF carrier, or annuity issuer				Address	3
		Applicant's signature			or	See letter attached
Pa	rt 2 -Transferee	,				
5.	We will accept the direct transfer of the above amount. We will annuitant under the RRSP or RRIF identified in question 4. The	I use it to buy an annuity e RRSP or RRIF conforn	described ns, or will c	in clause onform,	e 60(I)(ii)(A), to the followi	or we will credit it to the ng specimen:
	Spe	cimen plan or fund number,	and name			
6.	The plan or fund is registered under the <i>Income Tax Act</i> , or if Information Circulars 72-22 and 78-18. We will check the plan		,		,	5
	Transferee's name					
	Authorized person's signature					Date
Pa	rt 3 - Transferor: Issue a T4RSP or T4RIF slip for th	e transfer, and state th	nat it is a s	subpara	graph 60(l)	(v) transfer.
7.	We have transferred \$f	rom the RRSP or RRIF id	lentified in	question	1 to the tran	sferee identified in question 4.
a)	Did the annuitant's spouse or common-law partner contribute this transfer or in any previous year?	to the RRSP in the year o	of	Ye	es	No Does not apply
b)	Does the RRIF include amounts that were transferred from spouse or common-law partner has contributed?	an RRSP to which the	annuitant's	S Ye	es	No Does not apply
c)	Name of spouse or common-law partner		Socia	l insuranc	e number of sp	pouse or common-law partner
8.	Is the transfer from a "qualifying RRIF", as defined under "Def	initions" on the back of th	is form?	ΠYe		No Does not apply
	I certify that the information given on this form is, to the b			ш		No Does not apply
	Transferor's name					
	Authorized person's signature					Date
Pa	rt 4 - Transferee: Issue a receipt for tax purposes in	-				
	We have received \$ for	credit to the applicant's a	account, ac	cording	to the instruc	ctions in Part I.
	Authorized person's signature					Date



DIRECT TRANSFER UNDER SUBPARAGRAPH 60(I)(v)

See the back of this form for instructions and definitions. Legislative references on this form are from the *Income Tax Act*.

Pa	rt 1 – Applicant						
	Name	Social ins	surance numb	oer			Telephone
1.	Please transfer \$ from	Address the (check one)	RRSP		or RRIF	id	entified below.
	Name of RRSP issuer or RRIF carrier			Plan	or fund numb	er and nam	е
	Address of F	RRSP issuer or RRI	F carrier				
2.	Check one.						
	I am the annuitant under the RRSP.						
	I am the annuitant under the RRIF.						
3.	Check one.						
	The amount is the whole value of my RRSP annuity identified	above.					
	The amount is the partial value of my RRSP annuity identified	above.					
	The amount is an excess payment under my RRIF identified a	above.					
4.	Check one and complete the line that applies.						
	Please transfer the amount to the following RRSP:						
	Please transfer the amount to the following RRIF:			RRSP n	umber and na	ıme	
	Please transfer the amount to buy a qualifying annuity.			RRIF ni	umber and na	me	
	Name of RRSP issuer, RRIF carrier, or annuity issuer				Addres	s	
	Date Ap	plicant's signature			or	See le	tter attached
Pa	rt 2 -Transferee	· · · · · ·					
5.	We will accept the direct transfer of the above amount. We will use it annuitant under the RRSP or RRIF identified in question 4. The RRS						
	Specimen plan or fund number, and name						
6.	The plan or fund is registered under the <i>Income Tax Act</i> , or if the plan Information Circulars 72-22 and 78-18. We will check the plan or fundamental transfer of the plan or fundamental transfer or						
	Transferee's name						
	Authorized person's signature	_				D	ate
Pa	rt 3 - Transferor: Issue a T4RSP or T4RIF slip for the tran	sfer, and state t	that it is a s	subpara	agraph 60(l)(v) trans	fer.
7.	We have transferred \$from the	e RRSP or RRIF i	dentified in	questior	1 to the tra	nsferee id	entified in question 4.
a)	Did the annuitant's spouse or common-law partner contribute to the this transfer or in any previous year?	RRSP in the year	of	Y	es	No	Does not apply
b)	Does the RRIF include amounts that were transferred from an RF spouse or common-law partner has contributed?	RSP to which the	e annuitant's	5 Y	es	No	Does not apply
c)	Name of spouse or common-law partner		Sc	ocial insu	rance number	of spouse	or common-law partner
8.	Is the transfer from a "qualifying RRIF", as defined under "Definitions	s" on the back of t	his form?	Пу	es	No	Does not apply
	I certify that the information given on this form is, to the best of	my knowledge,	correct and	d compl	ete.	l	
	Transferor's name						
	Authorized person's signature	_				Da	ate
Pa	rt 4 - Transferee : Issue a receipt for tax purposes indicating	the amount of t	he transfer	under	subparagra	aph 60(I)	(v).
	We have received \$for credit	to the applicant's	account, ac	cording	to the instru	ctions in F	Part I.
	Authorized person's signature	-				D:	ate
	7 Authorized person o digitaturo						





DIRECT TRANSFER UNDER SUBPARAGRAPH 60(I)(v)

See the back of this form for instructions and definitions. Legislative references on this form are from the Income Tax Act.

Pa	rt 1 – Applicant							
	Name	_	Social inst	urance num	ber	-		Telephone
1.	Please transfer \$ fr		Address (check one)	RRSP		or RRIF	id	dentified below.
	Name of RRSP issuer or RRIF carrier				Plan	or fund numb	er and nar	me
	Addres	ss of RRSI	P issuer or RRIF	carrier				
2.	Check one.							
	I am the annuitant under the RRSP.							
	I am the annuitant under the RRIF.							
3.	Check one.							
	The amount is the whole value of my RRSP annuity identi	ified abo	ve.					
	The amount is the partial value of my RRSP annuity ident	ified abo	ve.					
	The amount is an excess payment under my RRIF identifi	ied above	э.					
4.	Check one and complete the line that applies.							
	Please transfer the amount to the following RRSP:							
	Please transfer the amount to the following RRIF:				RRSP no	umber and na	me	
	Please transfer the amount to buy a qualifying annuity.				RRIF nu	ımber and naı	me	
	Name of RRSP issuer, RRIF carrier, or annuity issuer					Addres	s	
						or	See le	tter attached
Pa	rt 2 –Transferee	Applica	nt's signature					
	We will accept the direct transfer of the above amount. We will annuitant under the RRSP or RRIF identified in question 4. The							
	Specin	men plan o	or fund number,	and name				
6.	The plan or fund is registered under the <i>Income Tax Act</i> , or if the Information Circulars 72-22 and 78-18. We will check the plan of							
	Transferee's name							
	Authorized person's signature						ſ	Date
Pa	rt 3 – Transferor: Issue a T4RSP or T4RIF slip for the	transfe	r, and state t	hat it is a	subpara	ıgraph 60(l)(v) trar	sfer.
7.	We have transferred \$from	m the RF	RSP or RRIF io	dentified in	question	1 to the trai	nsferee i	dentified in question 4.
a)	Did the annuitant's spouse or common-law partner contribute to this transfer or in any previous year?	the RRS	P in the year	of	Ye	es	No	Does not apply
b)	Does the RRIF include amounts that were transferred from a spouse or common-law partner has contributed?	n RRSP	to which the	annuitant	's Ye	es 🔲	No	Does not apply
c)	Name of spouse or common-law partner			s	ocial insura	ance number	of spouse	or common-law partner
8.	Is the transfer from a "qualifying RRIF", as defined under "Defini	itions" on	the back of th	nis form?	ΓYε	\Box	No	
	I certify that the information given on this form is, to the best						NO	Does not apply
	Transferor's name							
	Authorized person's signature						Г	Date
Pa	rt 4 – Transferee : Issue a receipt for tax purposes indicat	ting the	amount of th	e transfe	r under s	subparagra		
	We have received \$ for cr	redit to th	ne applicant's a	account, a	ccording	to the instru	ctions in	Part I.
	Authorized person's signature							Date
	Authorized person's signature						L	val e



DIRECT TRANSFER UNDER SUBPARAGRAPH 60(I)(v)

See the back of this form for instructions and definitions. Legislative references on this form are from the Income Tax Act.

Pa	rt 1 – Applicant							
	Name	Social insurance number		Telephone				
1.	Please transfer \$	Address from the (check one) RRSP	or RRIF	identified below.				
	Name of RRSP issuer or RRIF carrier		Plan or fund numb	per and name				
	Add	ress of RRSP issuer or RRIF carrier						
2.	Check one.							
	I am the annuitant under the RRSP.							
	I am the annuitant under the RRIF.							
3.	Check one.							
	The amount is the whole value of my RRSP annuity id	entified above.						
	The amount is the partial value of my RRSP annuity id	lentified above.						
	The amount is an excess payment under my RRIF ide	ntified above.						
4.	Check one and complete the line that applies.							
	Please transfer the amount to the following RRSP:							
	Please transfer the amount to the following RRIF:	RR	SP number and na	ame				
	Please transfer the amount to buy a qualifying annuity	RF	RIF number and na	ime				
	Name of RRSP issuer, RRIF carrier, or annuity issuer		Addres	SS				
	 Date	Applicant's signature	or [See letter attached				
Pa	rt 2 -Transferee							
5.	We will accept the direct transfer of the above amount. We will annuitant under the RRSP or RRIF identified in question 4. The							
	Spe	ecimen plan or fund number, and name						
6.	The plan or fund is registered under the <i>Income Tax Act</i> , or if Information Circulars 72-22 and 78-18. We will check the plan							
	Transferee's name							
	Authorized person's signature			Date				
Pa	rt 3 - Transferor: Issue a T4RSP or T4RIF slip for th	ne transfer, and state that it is a sub	paragraph 60(l)(v) transfer.				
7.	We have transferred \$f	from the RRSP or RRIF identified in que	stion 1 to the tra	Insferee identified in question 4.				
a)	Did the annuitant's spouse or common-law partner contribute this transfer or in any previous year?	to the RRSP in the year of	Yes	No Does not apply				
	Does the RRIF include amounts that were transferred from spouse or common-law partner has contributed?	an RRSP to which the annuitant's	Yes	No Does not apply				
c)	Name of spouse or common-law partner	Social	insurance number	r of spouse or common-law partner				
8.	Is the transfer from a "qualifying RRIF", as defined under "De	finitions" on the back of this form?	Yes	No Does not apply				
	I certify that the information given on this form is, to the I	L						
	Transferor's name		_	Date				
	Authorized person's signature							
Pa	Part 4 – Transferee: Issue a receipt for tax purposes indicating the amount of the transfer under subparagraph 60(I)(v).							
	We have received \$for	r credit to the applicant's account, accord	ding to the instru	uctions in Part I.				
	Authorized person's signature			Date				
	, tatilon200 poroon o signaturo							

T2030 E (08)

 $(Vous\ pouvez\ obtenir\ ce\ formulaire\ en\ français\ \grave{a}\ \textit{www.arc.gc.ca/formulaires}\ ou\ au\ \textit{1-800-959-3376.})$



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 or a RRIF, or to transfer it to purchase another annuity;
- your RRIF carrier to transfer an excess amount to your RRSP or to purchase an annuity.

How to complete this form

Part 1

The annuitant 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, or the RRIF carrier 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.

Transferee: The RRSP issuer, RRIF carrier, 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 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 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 marked yes.

Definitions

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

Excess amount – An amount in excess of the minimum amount payable each year from a RRIF.

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 or common-law partner – You can find the definition of these terms in most of the guides and pamphlets we publish.

Transferee – The issuer of the plan, the carrier of the fund, or the issuer of the annuity to whom the amount is transferred.

Transferor – The issuer of the plan or the carrier of the fund from whom the amount is transferred.