B2B BANK DISCOUNT BROKERAGE

A division of B2B Bank Securities Services Inc.

Application to Remove the Spousal Designation on a Registered Retirement Savings Plan (RRSP)or a Registered Retirement Income Fund (RRIF)

To: B2B Trustco
199 Bay Street, Suite 600
PO Box 279 STN Commerce Court
Toronto, ON
M5L 0A2

I, _____ (the annuitant) wish to remove the "spousal" designation from my spousal or common-law partner RRSP/RRIF Plan No. _____, as I am no longer:

☐ living with the person who is identified as the contributor in my spousal or common-law partner RRSP plan due to marriage-relationship breakdown,

☐ living with the person who is identified as the contributor to any RRSP plan from which transfers were made to my spousal or common-law partner RRIF plan, due to marriage-relationship breakdown.

☐ death of the contributor

Please process a plan type change on my spousal or common-law partner Plan No. _____ ,
Or
Please transfer all the assets in my spousal or common-law partner RRSP/RRIF No. _____ to:

☐ New Individual RRSP (application form attached)   ☐ Existing Individual RRSP plan #:

☐ New Individual RRIF (application form attached)   ☐ Existing Individual RRIF Plan #:

I have attached a copy of the following document(s) to substantiate this request:

☐ Separation Agreement   ☐ Court Order   ☐ Death Certificate

☐ Divorce Decree/Certificate of Divorce)   ☐ Divorce Judgement #

Declaration

I, declare that no spousal contributions were made to any of my spousal or common-law partner RRSP plans with B2B Trustco or any other Financial Institution in the tax year, in which I am making this request, and the two tax years, which immediately precedes this request. This includes any funds that have been transferred to a RRIF.

I, further declare that no withdrawals have been made from my spousal or common-law partner RRSP plan during the year of this request or in the case of a spousal or common-law partner RRIF plan no more than the minimum amount was withdrawn.

I certify that all the information contained in this letter is true, complete and correct.

Dated at _____ in the Province of _____ this ___day of_____ 20_____.

Annuitant's Signature   _____