

Credit Union Deposit Program

RRSP RRIF

DEPOSIT FORM

If this is the **first deposit** to contract:
 - Application must be attached
 - Designation of Beneficiary should be attached

Credit Union/Branch Name <input style="width:95%;" type="text"/>	Credit Union # <input style="width:95%;" type="text"/>	Branch # <input style="width:95%;" type="text"/>	Contract # <input style="width:95%;" type="text"/>
Annuitant (Last name, first name) <input style="width:95%;" type="text"/>			Client # <input style="width:95%;" type="text"/>
Do funds represent spousal contributions? <input type="checkbox"/> Y,N			
Are funds subject to pension lock-in? <input type="checkbox"/> Y,N If Y, _____ (Jurisdiction)			
For RRIF, are funds from a Qualifying (Pre-1993) RRIF? <input type="checkbox"/> Y,N			

Deposit Detail

DD/MMM/YYYY

Amount Deposit Date

Deposit Type

Variable: Existing Sub or New

Fixed Term: Term in Months Interest Rate % Compound Frequency M,Q,S,A Interest Option Compound Pay to Variable Sub

Transaction Code

(d) Cash Deposit, Home Buyers'/Lifelong Learning Plan Repayment to RRSP, Transfer-in from RRIF (RRSP)

(d) Transfer-in from RESP (RRSP)

(tie) Transfer-in from RRSP, RPP, DPSP (RRSP)

(tie) Transfer-in from RRSP, RRIF, RPP (RRIF)

(tie) Transfer-in from internal RRSP (RRIF) - Maturity Date (If continuing term length in new contract)

(tira) Transfer-in of retiring allowance (RRSP)

(tid) Transfer-in from deceased spouse's contract (RRSP/RRIF)

(tian) Transfer-in from annuity (RRSP/RRIF)

RRIF Payment Detail (complete only if first deposit to new contract)

	Payment Type Current Year <input style="width:60px;" type="text"/> } Minimum Next Year <input style="width:60px;" type="text"/> } Specified } Maximum (LIF, LRIF Only)	Payment Schedule <input type="checkbox"/> M-Monthly <input type="checkbox"/> Q-Quarterly <input type="checkbox"/> S-Semi-Annual <input type="checkbox"/> A-Annual	Payment Due DD/MMM/YYYY <input style="width:100px;" type="text"/> <input style="width:100px;" type="text"/>	Payment (per frequency) <input style="width:100px;" type="text"/> <input style="width:100px;" type="text"/>
Payment Destination _____				

*specify day: 15th or month-end

Accepted by Credit Union Authorized Officer, as agent

Date

Annuitant's Signature