

Contract Number

Personal Information

Annuitant (last name, first name)

Contributor Information

Do not combine spousal and non-spousal deposits into the same contract.

Is this a spousal deposit/transfer?

☐ Y - Yes
☐ N - No

If "Yes", complete the following:

Contributor (last name, first name)

Contributor's SIN

Deposit Detail

Are funds subject to pension lock-in?

☐ Yes
☐ No

If Yes _____ (jurisdiction)

Transaction Code

☐ Cash Contribution, HBP/LLP Repayment, or Transfer from RRIF

☐ Contribution in kind (complete Securities Deposits below)

☐ Home Buyers' Plan Cancellation

☐ Transfer from RRSP/RPP/DPSP/TFSA

☐ Transfer from a Deceased Spouse's RRSP/RRIF/TFSA

☐ Transfer from a Retiring Allowance/Severance Pay

Deposit Date

(MM/DD/YYYY)

Deposit Amount

\$

Securities Deposits

(Description of Securities)

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Accepted by Authorized Agent

Date _____

Annuitant's Signature

Agent Name

Agent Telephone