

Account Number

Contract Number

Annuitant's Name

Contributor Information

Are these funds from a Spousal RRSP or RRIF Yes No

If yes, please complete the following:

Contributor's Name

Contributor's Social Insurance Number

Complete if First Deposit to RRIF Contract

Age Base

I hereby elect to base the term of payments under this arrangement on the age of myself **or**

I hereby elect to base the term of payments under this arrangement on the age of my spouse whose date of birth is (DD | MM | YY)

Designation

I wish to designate my spouse as the Successor Annuitant and have completed the Designation form attached dated (DD | MM | YY)

I wish to designate a beneficiary and have completed the Designation form attached dated (DD | MM | YY)

I do not wish to name a beneficiary on this contract

Payment Information

All payments will be transferred directly to the savings account opened under this same account number. Payments to be made as follows:

Payment Amount

I hereby elect to take the minimum payment required. I understand that in the calendar year it is first funded, no payment is required.

I hereby elect to take a specified payment amount of \$ _____

Payment Frequency

Annual payment with first payment dated (DD | MM | YY) Quarterly payments with first payment dated (DD | MM | YY)

Monthly payments with first payment dated (DD | MM | YY) Semi Annual payments with first payments dated (DD | MM | YY)

Deposit Information

Type of deposit

Deposit - Transfer from RRSP, this institution

Deposit - Transfer from RRSP/RPP, another institution

Deposit Amount: \$ _____ Date: (DD | MM | YY)

To either: Variable Rate RRIF

Fixed Term RRIF for 1yr 2yr 3yr 4yr 5yr

(Note: RRIF terms are non-redeemable terms only)

Annuitant's Signature

Date (DD | MM | YY)

OFFICE USE ONLY

Deposit - Transfer from Qualifying RRIF - Pre 1993 property

Deposit - Transfer from General RRIF - Post 1992 property

With interest rate of _____%

Accepted by Credit Union authorized officer, as agent

Date (DD | MM | YY)