

IUPAT Local 177 Pension Trust Fund

CRA Registration No. 0581397

Non-Locked-In Transfer Application

Please print and be sure to **SIGN** and **DATE** the application. Mail the completed application and supporting documents to the address indicated at the end of this form.

A portion of this application is to be completed by the financial institute who you have selected to receive the transfer.

The application is to be submitted along with Canada Revenue Agency T2151 form (Direct Transfer of a Single Amount Under Subsection 147(19) or Section 147.3).

Applicant Information

Name (Last)	(First)	(Middle)	Sex	
			M	F
Address (Mailing)			Suite No.	
City	Province	Postal Code	Telephone Number	
Date of Birth	Month	Day	Year	Social Insurance Number

Instructions Regarding Proof of Age

You must provide proof of age for yourself.

Examples of proof documents required are: Birth Certificate, Passport, Citizenship Certificate, and Immigration Papers.

If you cannot provide any of the above, please contact the fund office to discuss other possibilities.

Beneficiary Information

You may complete this section, if your pension is subject to a solvency deficiency. If you do not name a beneficiary, all pension benefits payable upon your death, will be paid to your estate.

I hereby revoke any previous designation of beneficiary and I hereby designate the following named beneficiary(ies) to receive the amount of pension benefits, if any, payable at my death, under the Rules and Regulations of the fund. I reserve the right to revoke and change this designation at any time by giving written notice to the fund.

Name (Last)	(First)	(Middle)	Sex	
			M	F
Address (Mailing)				
City	Province	Postal Code		
Date of Birth	(Month	Day	Year)	Relationship

PLEASE COMPLETE REVERSE

Underwriter Information			
Non-Locked-In Account Number (i.e. Registered Retirement Savings Plan Number)			
Name of Financial Institution			
Address (Mailing)			
City	Province	Postal Code	Telephone Number
Signature of Authorized Representative of Institution			
<div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="width: 45%;"> <p>_____ Name of Representative (please print)</p> </div> <div style="width: 45%;"> <p>_____ Signature of Representative</p> </div> </div> <div style="display: flex; justify-content: flex-end; margin-top: 10px;"> <p>_____ Date</p> </div> <p style="margin-top: 20px;">Please submit a Canada Revenue Agency T2151 form (Direct Transfer of a Single Amount Under Subsection 147(19) or Section 147.3) with Area I, only, completed.</p>			

Applicant Declaration	
<p>I hereby apply for a transfer of the commuted value of my pension from the IUPAT Local 177 Pension Trust Fund. The statements made in this application are true to the best of my knowledge and belief. I understand a false, misleading or inaccurate statement shall be sufficient reason for the denial, suspension or discontinuance of benefits under the pension plan and the Trustees shall have the right to recover any payments made to me because of a false, misleading or inaccurate statement.</p>	
_____ Signature of Applicant	_____ Date
_____ Signature of Witness or Pension Partner	_____ Name of Witness (please print)
<p>You will be notified in writing of the decision made by the Board of Trustees regarding your application or if any additional information is required.</p>	

Please return this form, with your original signature, by mail to:	Funds Administrative Service Inc. 10154 108 Street NW Edmonton AB T5J 1L3 Phone: (780) 452-5161 Toll Free: 1-800-770-2998
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Authorized Documents for Proof of Age

Listed in order of preference, these are the only acceptable forms of proof of age. Original documents are not required.

1. Birth Certificate
2. Passport
3. Citizen Certificate
4. Immigration Papers
5. Baptismal Certificate
6. Native / Metis Status Card
7. Marriage Certificate indicating your date of birth
8. Military Identification / Documentation indicating your date of birth
9. Canada Pension Plan documentation indicating your date of birth

NOTE: If you can not provide a photocopy of any of the above documentation, please contact our office for alternative suggestions and request a Statutory Declaration.