



APPLICATION FOR WITHDRAWAL OR TRANSFER

Provided that you are no longer working for any employer member of the CSS Pension Plan, you can choose any of the following options. For more information on your options and for forms, visit www.csspen.com. Please have your latest Annual Statement with you as you fill this form. Return the completed form and supporting documentation to CSS by regular mail, fax or email to repayments@csspen.com.

NOTES:

- 1. If you select Option 1 or 3, a copy of your signed photo ID is required along with your completed form.
2. If you select Option 2, 3, 4 or 5, a Canada Revenue Agency T2151 form must be completed and returned. For Option 4 or 5, you must also submit the CSS Pension Plan's Lock-In/Transfer Agreement and Spousal Waiver form (if applicable) for the appropriate province. For Option 5, a minimum of \$25,000 of locked-in funds must be left in your CSS Pension Plan account (other restrictions may also apply).
3. The CSS Pension Plan must receive the final pension contributions before a repayment/transfer can be processed.
4. The amount of your repayment/transfer will be based on the market value of your pension funds on the date of processing and may be greater or less than the amount(s) reported to you on your last Annual Statement.
5. Funds repaid / transferred will be forwarded by mail unless you arrange a courier at your expense.

OPTIONS

Check the appropriate box(es) [].

DO NOT return this form if you wish to leave all your pension funds in the Pension Plan until further notice. This is the default option. You can exercise Option 1, 2, 3, 4 or 5 at a later date (provided you are not employed by an employer member at the time). You should only fill and return this form if you wish to choose any of the options below.

Table with 2 columns: Option and Description. Options include: Option 1 (withdraw all non-locked-in funds), Option 2 (transfer all non-locked-in funds to RRSP/RRIF), Option 3 (withdraw specified amount and transfer balance), Option 4 (transfer all locked-in funds to RRSP, LIRA, LIF or SK-PRRIF), Option 5 (transfer part of locked-in funds and withdraw amount).

MEMBER INFORMATION

Form fields for member information: Surname, First name and middle name(s), Mailing address (Street address or PO Box number), (City), (Province), (Postal code), Phone number, Email address, Member ID Number (check your annual statements). Includes a section for financial advisor information: Name, Phone number, Email address.

DECLARATION

- 1. I certify that I have not accepted employment with any other co-operative or credit union that is a member of the CSS Pension Plan.
2. Where original repayment or transfer documents are not provided, CSS Pension Plan may proceed to process my repayment or transfer request upon receipt of photocopies, emailed or faxed copies of these documents.
3. Notwithstanding the best evidence rule, where photocopies, emailed or faxed copies are received by CSS Pension Plan they shall be binding on me as primary evidence and accepted by me as conclusive proof of their contents.

SIGNATURE

Signature box

DATE SIGNED

Date signed box

(dd/mm/yyyy)