



APPLICATION TO TRANSFER-IN LOCKED-IN FUNDS

As a member of the Co-operative Superannuation Society (CSS) Pension Plan (Registration #0345868), you are permitted to transfer pension funds originally contributed to another registered pension plan to the CSS Pension Plan.

Please read the following carefully, complete the application and acknowledgement below, and return your completed form and any supporting documentation to the CSS Pension Plan by regular mail, fax or email.

I, \_\_\_\_\_ Member ID#: \_\_\_\_\_

Mailing address (Street/Box Number) (City) (Province) (Postal Code)

hereby notify the CSS Pension Plan as follows:

[ ] I am the annuitant named under an individually registered plan containing locked-in pension funds with:

Name of Credit Union, Bank or Trust Company

Branch Address

Contract Number

[ ] I am an inactive/former member of the Registered Pension Plan known as:

Name of Registered Pension Plan

Registered Pension Plan Address

CRA Registration Number

Member ID Number

I wish to transfer all funds held to my credit in the above named registered plan to my account with the CSS Pension Plan:

The estimated amount of funds to be transferred is: \$ \_\_\_\_\_

Such funds are locked-in under the pension legislation of: \_\_\_\_\_ Name of Jurisdiction

DECLARATION AND ACKNOWLEDGEMENT

I DECLARE that the information set out above is true. I HEREBY ACKNOWLEDGE that the funds transferred in accordance with these instructions:

- will be invested in the Balanced Fund (i.e., the CSS Pension Plan's default investment fund) unless I instruct otherwise herein (total must equal 100%):

Table with 4 columns: Fund Name, Percentage, Fund Name, Percentage. Rows: Balanced Fund, Bond Fund, Equity Fund, Money Market Fund.

- will become subject to the Rules & Regulations of the CSS Pension Plan;
without restricting the generality of the foregoing, I acknowledge that these funds, once transferred into the CSS Pension Plan, cannot be withdrawn until my employment has terminated and I am no longer an active contributing member of the Plan.

Where original transfer-in documents are not provided, CSS Pension Plan may proceed to process my request upon receipt of photocopies or faxed copies of these documents. Notwithstanding the best evidence rule, where the CSS Pension Plan receives photocopies or faxed copies they shall be binding on me as primary evidence and accepted by me as conclusive proof of their contents.

SIGNATURE

Signature line

DATE SIGNED

Date signed line

(dd/mm/yyyy)