

Direct Transfer from RRSP

This form is used to record a direct transfer from an RRSP or spousal RRSP to the Ontario Teachers' Pension Plan.



1. Annuitant Information (Plan Member) Complete this section then give original form to financial institution/RRSP issuer

Last Name		First Name		Social Insurance Number	
Address		City/Town	Province	Postal Code	Telephone Number

Part A: Financial Institution and Registered Retirement Savings Plan (RRSP) Identification

☐ I am the annuitant under the RRSP _____
RRSP Account Name and Number

☐ I am the annuitant under the spousal RRSP _____
RRSP Account Name and Number

Name and Address of Financial Institution/RRSP Issuer

Part B: Amount to be Transferred (select one)

Please transfer ☐ all of the property or ☐ the lump sum of \$ _____ * in cash, which represents part or all of the property of my unmatured RRSP. Please transfer the amount identified above to my account as a plan member of the Registered Pension Plan (RPP): Ontario Teachers' Pension Plan, 160 Front Street West, Suite 3200, Toronto, Ontario, M5J 0G4

** If the lump-sum amount is coming from separate investment funds within your RRSP, attach instructions specifying which funds the money should be taken from, and the amount to be taken from each fund.*

Signature of Annuitant (Plan Member)

YYYY MM DD

Date Signed

2. Transferee – completed by Ontario Teachers' Pension Plan

We agree to the above request for a direct transfer of property. When we receive the property, we'll credit it to the annuitant (plan member) under the Ontario Teachers' Pension Plan. The Ontario Teachers' Pension Plan is an RPP under the *Income Tax Act*.

Canada Revenue Agency RPP
Registration Number: 0345785

Authorized Signature

YYYY MM DD

Date Signed

3. Transferor – to be completed by RRSP Issuer (Don't issue a T4RSP slip for the amount transferred)

We've transferred \$ _____ (net of fees) from the RRSP identified in Part A to Ontario Teachers' Pension Plan.

This amount ☐ isn't from a locked-in RRSP
☐ is from a locked-in RRSP Jurisdiction* _____

** Ontario Teachers' Pension Plan will only administer locked-in funds in accordance with the requirements of Ontario's Pension Benefits Act. Locked-in funds subject to the requirements of a jurisdiction other than Ontario cannot be accepted.*

☐ I certify that the information given on this form is, to the best of my knowledge, correct and complete.

Transferor's Name

Authorized Signature

YYYY MM DD

Date Signed

Note: This form is a customized alternative to the Canada Revenue Agency (CRA) form T2033.