



Department of Environment and Labour
Pension Regulation Division

Form 3 - Application to Transfer Commuted Value of Deferred Pension
(Section 50 of the *Pension Benefits Act*)

I, _____, am a member/surviving spouse or common-law partner of a member _____ (give name of member) of the registered pension plan known as _____ and hereby apply to:

Check one

1. transfer the commuted value of my deferred pension to a LIRA as prescribed under Section 22 of the *Pension Benefits Regulations* _____
2. transfer the commuted value of my deferred pension to a LIF as prescribed under Section 23 of the *Pension Benefits Regulations* _____
3. use my pension benefit to purchase an immediate life annuity as prescribed under Section 24 of the *Pension Benefits Regulations* _____
4. use my pension benefit to purchase a deferred life annuity as prescribed under Section 24 of the *Pension Benefits Regulations* _____
5. transfer my pension benefit to a pension plan of which I am currently a member, which is known as _____

My address is:

Signed at _____ in the Province of _____ on _____, _____

Signature of member
(surviving spouse or common-law partner of member)

Signature of witness

Name of member
(surviving spouse or common-law partner of member)

Name of witness

Application having been received for:

Check one

1. a LIRA as prescribed under Section 22 of the *Pension Benefits Regulations* _____
2. a LIF as prescribed under Section 23 of the *Pension Benefits Regulations* _____

- 3. an immediate life annuity as prescribed under Section 24 of the *Pension Benefits Regulations* _____
- 4. a deferred life annuity as prescribed under Section 24 of the *Pension Benefits Regulations* _____
- 5. transfer to a registered pension plan _____

The funds will only be transferred to a LIRA or LIF or used to purchase an immediate life annuity or a deferred life annuity that meets the requirements of the *Pension Benefits Regulations* and will be administered in accordance with the *Pension Benefits Act*.

The funds were determined on a basis that did () or did not () differentiate on the basis of sex.

The earliest date on which the former member is entitled to receive pension benefits is _____.

Signed at _____ in the Province of _____ on _____, _____.

Signature of administrator/transferor

Signature of administrator/transferee

Name of administrator/transferor

Name of administrator/transferee

Name of institution transferring funds

Name of institution accepting funds