



Province of Manitoba
Information Provided by Financial Institution to
Accompany Request for Approval of Transfer from A
Manitoba LIF or LRIF to a RRIF Prescribed Under
Manitoba Pension Legislation ("Transfer")
[in accordance with Section 18.2(5.4) of the Regulation]

Name of Organization completing form as Agent for Concentra Trust _____
 _____ (the "Financial Institution")

Name of Annuitant of LIF/LRIF: _____

Date of Birth of Annuitant (yyyy/mm/dd): _____ (must be at least 55 years of age)

Social Insurance Number of Annuitant: _____ LIF/LRIF Contract #: _____

Calculation of Maximum Amount Available for Transfer:

A Account Balance on the Date of Application (yyyy/mm/dd) _____:	\$ _____
Less: Amount, if any, to be paid to satisfy a maintenance order issued under <i>The Family Property Act</i> of Manitoba, as provided for under Section 31(2) of <i>The Pension Benefits Act</i> of Manitoba	(_____)
Less: Amount, if any, to be paid to satisfy a maintenance order issued under Section 14.1 of <i>The Garnishment Act</i> of Manitoba	(_____)
Net Balance	\$ _____
B Maximum amount available for transfer (50% x Net Balance)	\$ _____
Less: Amount, if any, to be retained to satisfy an order to preserve assets under Section 59.3 of <i>The Family Maintenance Act</i> of Manitoba	(_____)
Net Amount Available for Transfer	\$ _____
C Amount Requested to be Transferred to Prescribed RRIF	\$ _____
Note: Amount in C cannot exceed Net Amount in B above.	

PROJECTION
 Projected Maximum Income Payment from LIF/LRIF in the following year if balance is reduced by the amount in C above:

Balance in LIF/LRIF after Transfer	\$ _____
Plus: Projected investment return at 6% for remainder of year of transfer	\$ _____
Balance on January 1 of following year	\$ _____
Projected Maximum Payment from LIF/LRIF	\$ _____

This projection has been made on the following assumptions:

1. the Transfer will occur on the Date of Application.
2. that, in the case of:
 - a) LRIF, it is the first fiscal year of the LRIF and the income that may be paid is the amount determined under clause 18.2(8)(a) of the regulation (for this purpose, cannot exceed 6% of the balance)
 - b) LIF, the reference rate is 6%.

- If the Transfer by the Annuitant of the LIF/LRIF Contract above-noted is completed:
1. the amount available to the spouse or common-law partner of the Annuitant on the death of the Annuitant will reduced by the amount in C above.
 2. the amount to be shared with the spouse or common-law partner of the Annuitant in the event of a breakdown of their relationship will be reduced by the amount in C above.
 3. the amount on which income will be earned in the fund in future years will be reduced by the amount transferred in accordance with C above.

No other Transfer has been made by the Annuitant from this Financial Institution and this Financial Institution is not aware that the Annuitant has previously made any other such Transfer.

I, _____, an employee or official of the above Financial Institution, certify that the above information is, to the best of my knowledge, correct.

Signed at _____ this _____ day of _____, 20 _____.

 Printed Name

 Signature