

REQUEST FOR TRANSFER FROM DEFINED CONTRIBUTION ACCOUNT

WHEN TO USE THIS FORM

A Form P3 is used when

- there is an agreement or order dividing the benefits,
- the benefits are in a defined contribution account, and
- the spouse wants the spouse's proportionate share transferred to another plan (such as an RRSP).

[Please print.]

To: **Administrator of plan**

Name of plan: _____

Address of administrator: _____

From: **Spouse of member**

[Note: "Spouse" includes a person who has lived in a marriage-like relationship with the member for a continuous period of at least two years and also includes a former spouse.]

Name of spouse: _____

Address: _____

Email address: _____

Telephone: (home) _____ (work) _____

Social Insurance Number: _____

Date of birth: _____

[The administrator will use this information to contact you about important matters. Make sure it is accurate and that you promptly advise the administrator of any changes.]

In relation to: **Plan member**

Name of member: _____

Address: _____

Email address: _____

Telephone: (home) _____ (work) _____

Social Insurance or Plan Identity Number: _____

Employer: _____

Other requirements:

A copy of the agreement or order dividing the benefits must be provided.

[Please attach or enclose the agreement or order with this form.]

An administrator is entitled to charge a fee to transfer the benefits from the defined contribution account of \$175.

Request:

I request that you

- (a) transfer my proportionate share of the member's defined contribution account from the plan in accordance with the *Family Law Act* and the *Pension Benefits Standards Act*, and
- (b) advise me in writing of the information that you require in order to do this.

Signed (spouse):

Signed (witness to signature of spouse):

Date: _____

Name of witness: _____

Address of witness: _____
