

PO Box 1907, Station Terminus 522 University Ave, Suite 400
 Quebec City, QC G1K 7M3 Toronto, ON M5G 1Y7
 Fax: 1 800 786-6065 Fax: 1 866 395-5553

REQUEST FOR WITHDRAWAL/TERMINATION FORM

This form is optional. For fast, efficient service, call 1 800 567-5670.

Contract no. [] [] [] [] [] [] [] [] [] [] [] [] Division no. [] [] [] [] [] [] Policyholder _____

Member's first name _____ Member's last name _____

Social Insurance Number []

Member address _____

No. _____ Street _____ Apartment _____

 City _____ Province _____ Postal code [] [] [] [] [] []

TERMINATION/RETIREMENT

Termination of employment/retirement, effective date: []

Close account, effective date: []

The last contribution will be remitted to Industrial Alliance on []

(All requests will be processed after receipt of the last contribution.)

WITHDRAWAL/TRANSFER
Cash withdrawal

Payment method Cheque
 Direct deposit (Attach a void cheque.)
 Partial amount or Total amount
 Before tax (gross) or After tax (net)
 Amount withdrawn: \$ _____ or _____ %

Home Buyer's Plan: attach a completed form T1036.
 Lifelong Learning Plan: attach a completed form RC96.

Transfer to another financial institution

Partial amount or Total amount
 Amount withdrawn: \$ _____ or _____ %
 Attach a completed T2033 (RRSP) or T2151 (RPP, DPSP) form.

For RRSP and DPSP plans only

Signature of irrevocable beneficiary, if applicable _____ Date []
 Signature of irrevocable beneficiary, if applicable _____ Date []
 Signature of irrevocable beneficiary, if applicable _____ Date []

Member's Signature _____ Phone [] Date []

Policyholder's Signature _____ Title _____ Date []
 (If applicable)

Home Buyers' Plan (HBP) Request to Withdraw Funds from an RRSP

Protected B
when completed

Use this form to make a withdrawal from your registered retirement savings plan (RRSP) under the Home Buyers' Plan (HBP). Complete Part A of Area 1 to determine if you are eligible to make a withdrawal from your RRSP under the HBP. Although some conditions may apply to another person in certain situations, you (the participant) are responsible for making sure that all the conditions are met. For more information about the HBP, go to www.cra.gc.ca/hbp. **Generally, you must receive all your HBP withdrawals in the same calendar year. The maximum you can withdraw is \$25,000.** Complete Area 1 and give the form to your financial institution.

Area 1 – To be completed by the participant

Part A – Complete the following questionnaire to determine if you can make a withdrawal from your RRSP under the HBP.	
<p>1. Are you a resident of Canada?</p> <p>Yes <input type="checkbox"/> Go to question 2. No <input type="checkbox"/> You cannot make an HBP withdrawal.</p> <p>2. Has the person buying or building a qualifying home entered into a written agreement to do so?</p> <p>Yes <input type="checkbox"/> Go to question 3a). No <input type="checkbox"/> You cannot make an HBP withdrawal.</p> <p>3a). Have you ever, before this year, withdrawn funds from your RRSP under the HBP to buy or build a qualifying home?</p> <p>Yes <input type="checkbox"/> Go to question 3b). No <input type="checkbox"/> Go to question 4a).</p> <p>3b). Are you making this request in January as part of the participation you began last year?</p> <p>Yes <input type="checkbox"/> Go to question 4a). No <input type="checkbox"/> Go to question 3c).</p> <p>3c). Was your repayable balance from your previous HBP participation zero on January 1 of this year?</p> <p>Yes <input type="checkbox"/> Go to question 4a). No <input type="checkbox"/> You cannot make an HBP withdrawal.</p> <p>4a). Are you a person with a disability?</p> <p>Yes <input type="checkbox"/> Go to question 5. No <input type="checkbox"/> Go to question 4b).</p>	<p>4b). Are you withdrawing funds from your RRSP to buy or build a qualifying home for a related person with a disability or to help such a person buy or build a qualifying home?</p> <p>Yes <input type="checkbox"/> Go to question 5. No <input type="checkbox"/> Go to question 4c).</p> <p>4c). At any time during the period beginning January 1 of the fourth year before the year of the withdrawal and ending 31 days before the date of the withdrawal, did you or your spouse or common-law partner own a home that you occupied alone or with that other individual while you were spouses or common-law partners?</p> <p style="text-align: center;">You are not considered to be a first-time home buyer and you cannot make an HBP withdrawal.</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> Go to question 5.</p> <p>5. Does the person buying or building the qualifying home intend to occupy it as his or her principal place of residence no later than one year after buying or building it? If you are acquiring the home for a related person with a disability or helping a related person with a disability acquire the home, you must intend that the related person with a disability occupy the home as his or her principal place of residence.</p> <p>Yes <input type="checkbox"/> Go to question 6. No <input type="checkbox"/> You cannot make an HBP withdrawal.</p> <p>6. Has the person who is buying or building the qualifying home or his or her spouse or common-law partner owned the home more than 30 days before receiving this withdrawal?</p> <p>Yes <input type="checkbox"/> You cannot make an HBP withdrawal. No <input type="checkbox"/> You are eligible (complete Part B below).</p>

Part B – Complete this part to make a withdrawal from your RRSP under the HBP.					
First name and initial(s)		Last name		Social insurance number	
Address of qualifying home being bought or built (include number, street, rural route, or lot and concession number)					If you are a person with a disability, tick this box. <input type="checkbox"/>
City		Province or Territory		Postal code	
				Telephone number	
If you answered yes to question 4b) above, provide the following information about that person:					
Person's name		Relationship to you		SIN of person with the disability	

Part C – Certification		
Amount of requested withdrawal \$ _____	Date withdrawal required ▶	Year Month Day
I certify that the information given on this form is correct and complete.	Date ▶	Year Month Day
	Participant's signature _____	
Account number of the RRSP from which the withdrawal is made		

Area 2 – To be completed by the RRSP issuer (Do not send us this form. Keep it for your records.)		
Issuer's name	Telephone number	Amount of the withdrawal (maximum \$25,000) \$ _____
Issuer's address		Date withdrawal paid ▶
		Year Month Day

Privacy Act, personal information bank number CRA PPU 015