



# WESTERN PACIFIC TRUST COMPANY

## Transfer Authorization for Registered Investments

(RSP, LIRA, LRSP, RIF, LRIF, LIF)

This form can be used for RSP to RSP transfers (except for transfers due to death), RSP to RIF transfers, and RIF to RIF transfers. This form may be used in place of T2033(e)

### A: Client Identification

Account/Policy Holder Last Name	First name	Init.
Address	City	Province
Postal Code		
Social Insurance Number	Home Telephone Number	Business Telephone Number
- - -	( ) -	( ) -

### B: Receiving Institution Information

**Western Pacific Trust Company** **Client S/D#**   
 920-789 West Pender Street, Vancouver, BC V6C 1H2  
 Telephone: (604) 683-0455 Fax: (604) 669-6978

**Contact Name**

Registered Type:  RRSP  RRSP SPOUSAL  LIRA  LRSP  RRIF  LRIF  LIF

- We agree to the above request for a direct transfer of property. When we receive the property, we will credit it to the annuitant or member under the plan or fund identified above. If the plan or fund is an RRSP or a RRIF that conforms to a specimen plan or fund, it will conform with the specimen identified as: **RSP 541-001 / RIF 1434**. We will check the plan or fund identification above and add or correct information as necessary.
- The plan or fund is registered under the *Income Tax Act*, or if the plan or fund is not registered, we will apply for such registration according to Information Circulars 77-22 and 78-18.

### C: Client Direction to Relinquishing Institution

Relinquishing Institution Name

Address	City	Province	Postal Code
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Client Account/Policy Number

#### Transfer the following: (choose one)

- A. Full Account:  In-Cash  In-Kind
- B.  Partial In-Cash \$ \_\_\_\_\_ (Net) - see attached "Letter of Direction"
- C.  Partial In-Kind \_\_\_\_\_ (List Securities)

### D: Client Authorization

I hereby request the transfer of my investments as described above.  
 \* Where I have requested to transfer in cash, I authorize the liquidation of all or part of my investments and agree to pay fees, charges or adjustments.

Date \_\_\_\_\_ Signature of Account Holder: X \_\_\_\_\_

### E: For Use By Relinquishing Institution Only

Registered Type:  RRSP  LIRA  LRSP  RRIF  Qualified  Non-Qualified  LRIF  LIF

Spousal Plan: Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Init. \_\_\_\_\_

No  Yes if yes: \_\_\_\_\_

Locked In: Lock-In Funds \_\_\_\_\_ Governing Legislation \_\_\_\_\_ Social Insurance Number (Spouse) \_\_\_\_\_

No  Yes

Locked in confirmation attached \$ \_\_\_\_\_ - -

Contact Name \_\_\_\_\_ Telephone Number \_\_\_\_\_ Fax Number \_\_\_\_\_

\_\_\_\_\_ ( ) - \_\_\_\_\_ ( ) -

Date \_\_\_\_\_ Amount Transferred \$ \_\_\_\_\_ Authorized Signature \_\_\_\_\_

Is there an outstanding RRIF payment to be withdrawn?

No  Yes

Minimum amount \$ \_\_\_\_\_

Amount paid \$ \_\_\_\_\_

**LETTER OF DIRECTION**  
**(to be completed for a "Partial In-Cash" transfer)**

\_\_\_\_\_  
Investment Company of Record

\_\_\_\_\_  
Date

\_\_\_\_\_  
Address

\_\_\_\_\_  
City Province Postal Code

ATTENTION: Client Services/Processing Department

RE: \_\_\_\_\_  
Print Client Name RRSP Account #(s)

This is my written request that I wish to liquidate sufficient units from the following investments into CASH, which should total \$\_\_\_\_\_.

\$\_\_\_\_\_ from \_\_\_\_\_  
Fund Number Fund Name

\$\_\_\_\_\_ from \_\_\_\_\_  
Fund Number Fund Name

\$\_\_\_\_\_ from \_\_\_\_\_  
Fund Number Fund Name

Please have the monies forward to RRSP Account #8888-\_\_\_\_\_, Plan\_\_\_\_\_

Western Pacific Trust Company, Suite 920-789 West Pender Street, Vancouver, BC V6C 1H2

Please find attached a copy of a current investment statement(s) and the T2033 transfer documents. If further clarification or information is required please contact me immediately.

Yours truly,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, Province, Postal Code

\_\_\_\_\_  
Area Code Phone Number