




E D G E P O I N T®

Locking-In Agreement for transfer of Locked-In funds

1. Annuitant Information		
Annuitant's First Name:	Annuitant's Last Name:	
Annuitant's S.I.N.:		
2. Receiving Institution Information		
Name of Receiving Institution EdgePoint Wealth Management c/o CIBC Mellon GSS, Recordkeeping 1 York Street, Suite 900 Toronto, ON M5J 0B6	EdgePoint Account Number:	
Locked-in Confirmation EdgePoint Wealth Management as agent for The Royal Trust Company as Trustee agrees to administer all locked-in funds transferred under this transfer authorization in accordance with the governing legislation indicated in Section "3" below. Any subsequent transfer of these locked-in funds to another Trustee or financial institution will be made only to another registered plan, which must continue to be administered in accordance with legislation of the jurisdiction noted in Section "3" below. No transfer of locked-in funds will be permitted unless the receiving plan is appropriately registered and in compliance with the applicable pension legislation, regulations and the Income Tax Act (Canada).		
Application having being received for a Registered Retirement Savings Plan, for funds being transferred to another Registered Retirement Savings Plan governed by Federal and /or Provincial Legislation, requiring that these funds to be only available in the form of a Deferred Life Annuity, or Death Benefit, the following conditions shall form part of the terms and conditions constituting the said Registered Retirement Savings Plan:		
<ol style="list-style-type: none"> 1. The application shall not have the right to deregister the Registered Retirement Savings Plan; 2. The application shall not have the right to deregister the Registered Retirement Savings Plan applied for which would result in its disqualification; 3. That the funds so transferred shall not be assigned or commuted, other than in the form of a death benefit. 		
3. Governing pension legislation applicable: (check one)		
Federal Pension Benefits Standards Act and Regulations British Columbia Pension Benefits Standards Act and Regulations Alberta Employment Pension Plans Act and Regulations Saskatchewan Pension Benefits Act and Regulations Manitoba Pension Benefits Act and Regulations Ontario Pension Benefits Act and Regulations Quebec Supplemental Pension Plans Act and Regulations New Brunswick Pension Benefits and Regulations Nova Scotia Pension Benefits and Regulations P.E.I. Pension Benefits Act and Regulations Newfoundland Pension Benefits Act and Regulations	CIBC Mellon GSS Recordkeeping, 1 York St. Suite 900 Toronto ON M5J 0B6	
 _____ Signature of Officer	EdgePoint Wealth Mgmt. Inc. _____ Name of Carrier	Date: