

RRSP Direct Transfer Form (T2033)

Direct transfer under Paragraph 146 (6)(a) of the *Income Tax Act*. This form is used to record a direct transfer from an RRSP to the OPSEU Pension Plan.

1 Adelaide Street East, Suite 2900, Toronto, Ontario M5C 3A7

Telephone: 416-681-6100 Toll-free: 1-800-637-0024 Fax: 416-681-6175 www.optrust.com

1] ANNUITANT (PLAN MEMBER) INFORMATION – Complete this section then forward the form to your financial institution

Annuitant's (Plan Member's) Last Name		First Name and Initials	Social Insurance Number
<input type="text"/>		<input type="text"/>	<input type="text"/>
Home Telephone Number	Home Address: Number and Street, Apt. No.		
<input type="text"/>	<input type="text"/>		
City/Town	Province	Postal Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Part A: Financial Institution and RRSP Identification: I am the annuitant (Plan Member) under the Registered Retirement Savings Plan (RRSP)

RRSP Account Number	Name and Address of Financial Institution
<input type="text"/>	<input type="text"/>

Part B: Amount to be transferred: Please transfer the lump sum of \$ (net of fees) in cash which represents part or all of the property of my unmatured RRSP to my account as a member of the Registered Pension Plan (RPP):

OPSEU Pension Plan, 1 Adelaide Street East, Suite 2900, Toronto, ON M5C 3A7

Signature of Annuitant (Plan Member)	Date Signed (DD/MM/YYYY)
<input type="text" value="x Sign Here"/>	<input type="text" value="D D M M Y Y Y Y"/>

2] OPSEU PENSION TRUST

We agree to the above request for a direct transfer of property. When we receive the property we will credit it to the member under the OPSEU Pension Plan. The OPSEU Pension Plan is an RPP under the *Income Tax Act*.

Canada Revenue Agency RPP Registration Number: **1012046**

Authorized Name and Signature: Jesusa Chow 416-681-6100 or toll-free 1-800-637-0024	<input type="text" value="Jesusa Chow"/>	Date Signed (DD/MM/YYYY)
		<input type="text" value="D D M M Y Y Y Y"/>

3] FINANCIAL INSTITUTION – To be completed by financial institution upon receipt from RRSP account holder

(Do not issue a T4RSP slip for the amount transferred)

We have transferred \$ (net of fees) from the RRSP identified in Part A to the OPSEU Pension Trust.

Did the annuitant's (plan member's) spouse or common-law partner ever contribute to this RRSP? No Yes Does not apply

The OPSEU Pension Plan must continue to administer \$ as a locked-in amount as required by the *Ontario Pension Benefits Act*. Does not apply:

I certify that the information given on this form is, to the best of my knowledge, correct and complete.

Name and Title	Name and Address of Financial Institution	
<input type="text"/>	<input type="text"/>	
Authorized Signature	Telephone Number	Date Signed (DD/MM/YYYY)
<input type="text" value="x Sign Here"/>	<input type="text"/>	<input type="text" value="D D M M Y Y Y Y"/>

4] OPSEU PENSION TRUST – To be completed by OPTrust upon receipt of transfer from financial institution

(We will not issue a tax receipt for the amount transferred)

We have received \$ (net of fees) for transfer and administration according to section 1 above.

Authorized Signature	Telephone Number	Date Signed (DD/MM/YYYY)
<input type="text" value="x Sign Here"/>	<input type="text"/>	<input type="text" value="D D M M Y Y Y Y"/>

Keep a copy of this form for your records.