



Direct transfer of a single amount

CANADA REVENUE AGENCY

Use this form to record your OMERS benefit transfer to a locked in retirement account (LIRA), life income fund (LIF), registered retirement savings plan (RRSP) or registered retirement income fund (RRIF).

Complete this form and return it to OMERS, **One University Avenue, Suite 400, Toronto, ON M5J 2P1** or by fax to 416-369-9704 or 1-877-369-9704. If you fax it, do not also send the original. You must complete a separate form for each LIRA/LIF or RRSP/RRIF – please make a copy of this form, if necessary. If a portion of your transfer is locked in and a portion is not locked in, each portion must go to a different account.

Personal information is collected for pension administration purposes by OMERS under the authority of Section 35 of the *OMERS Act, 2006*. OMERS does not share personal information with any other person other than for purposes of pension plan administration, and, the provision of personal information is considered consent to its use for those purposes. The collection, use, retention and destruction of personal information are subject to our Privacy Policy at www.omers.com.

Any questions regarding the collection of personal information should be directed to OMERS Client Services at 1-800-387-0813.

APPLICATION FOR A DIRECT TRANSFER FROM AN RPP

Refer to your OMERS options form for transfer options available to you.

Social insurance number		OMERS membership number (if applicable)		
<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Other:	Last name	First name	Middle name	
Address (street number and name)		City	Province	Postal code
Daytime telephone ()				

Person requesting transfer: (please check one)

- I am a member of the OMERS Primary Pension Plan, a registered pension plan (RPP).
- I am a spouse or common-law partner, requesting a transfer due to the death of a member of the OMERS Primary Pension Plan.
- I am a spouse or common-law partner, requesting a transfer because of a breakdown of my marriage or common-law partnership with the member of the OMERS Primary Pension Plan.

I request the direct transfer of: (please check one)

- Commuted value benefit (within maximum limits, if applicable – locked in)
- Refund of contributions plus interest (not locked in)
- Refund of excess contributions (not locked in)
- Refund of pre-1987 contributions (not locked in)
- Commuted value (spousal survivor benefit – not locked in)

To: (please check and complete one)

- RRSP or RRIF (not locked in)

- LIRA or LIF (locked in)

Account number

Account number

Name of financial institution providing the RRSP or LIRA or the registered pension plan (RPP) administrator				
Address (street number and name)		City	Province	Postal code
Contact (please print)			Telephone number ()	
Signature		Date (m/d/yy)		



Phone

416-369-2444
1-800-387-0813



Fax

416-369-9704
1-877-369-9704



Mail

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Toronto ON M5J 2P1



Email

client@omers.com
(en français ou en anglais)



Web

www.omers.com