



APPLICATION FOR A ONE-TIME TRANSFER

Section 21.4 of The Pension Benefits Act of Manitoba and Sections 10.52 – 10.58.1 of the Regulation

AN APPLICATION FOR A ONE-TIME TRANSFER MAY ONLY BE MADE IN RESPECT OF A LOCKED-IN RETIREMENT ACCOUNT (LIRA), LIFE INCOME FUND (LIF), OR PENSION PLAN THAT IS LOCKED-IN UNDER THE PENSION BENEFITS ACT (ACT) OF MANITOBA AND PENSION BENEFITS REGULATION

If you wish to make a One-time Transfer from LIRAs, LIFs or Pension Plans managed by different administrators, you must make a separate application to each administrator within no more than 30 days after the first request.

I - APPLICANT INFORMATION

Form for Applicant Information with fields for First Name, Last Name, Address, City/Town, Province/Territory, Postal Code, Date of Birth, and Social Insurance Number.

II - ADMINISTRATOR INFORMATION

Form for Administrator Information with fields for Name of Administrator, Address, City/Town, Province/Territory, and Postal Code.

III - ONE-TIME TRANSFER INFORMATION

Identify for each of your LIRAs, LIFs or Pension Plans with the Administrator:

- List of requirements for one-time transfer information: Name of the Administrator, Address, Maximum amount that may be transferred from the plan, Amount to be transferred from each plan, Date the information was provided by the administrator under 10.56(3) of the regulation.

The application will be void and the transfer will not be made unless the administrator has received the following information:

- A written transfer consent of a spouse or common-law partner, if applicable
- Any other information the financial institution requires to facilitate the One-time Transfer.

The administrator must be satisfied that:

- The Applicant is at least 55 years old
- The administrator has not facilitated and is not aware of a previous One-time Transfer by the applicant
- No part of the amount to be transferred is the subject of an order
 - i. Under The Garnishment Act to enforce a maintenance order, or
 - ii. Under section 59.3 of The Family Maintenance Act to preserve assets.

The Applicant must provide the completed application to the administrator, together with the completed transfer consent, if required, within 30 days after receiving the application form and the information to be provided under subsection 10.56(3) of the regulation.

The Administrator must make the One-time Transfer within 90 days after providing the information to be provided to the applicant under subsection 10.56(3) of the regulation.