

Credit Union Retirement Savings Plan – APPLICATION

	Branch	
Branch Number	Member Number	Contract Number

Annuitant

Name

Address

 Postal Code

Social Insurance Number Birthdate
DD / MM / YYYY

Telephone (Residence) Telephone (Business)

Are you a resident of Canada (✓) Yes (✓) No

Pension Lock-In? (✓) Yes (attach agreement) (✓) No

Jurisdiction _____

Contributor

Complete only if this deposit is being made by and claimed as a deduction by your spouse (✓) Yes (✓) No

Name SIN

Please Review Carefully and Sign Below

To: Concentra Trust – Trustee

- I hereby apply for participation in the Trustee's Retirement Savings Plan (Plan) in accordance with the Declaration of Trust supplied to me.
- I request that the Trustee apply for registration of my plan as a retirement savings plan with the proper authorities pursuant to the provisions of the *Income Tax Act* (Canada).
- I request that this contribution, and any subsequent contributions, be deposited or invested in the Credit Union above named by the Trustee and I acknowledge that the terms and conditions of such deposits or investments have been and will be agreed upon between myself and the Credit Union and that such deposits or investments will be held in trust by the Trustee.
- I hereby acknowledge that I am solely responsible for determining the amount of contribution to the Plan which I may claim as a deduction under applicable tax legislation.
- I hereby acknowledge that any payments received by me under the Plan must be included in my income for the taxation year of receipt and will be subject to tax under the applicable tax legislation.
- I hereby authorize _____, the employer, to act as the agent for the purpose of deducting contributions by payroll deduction.
- I understand that the information gathered herein is exclusively for the purpose of establishment and the operation of the Plan and will not be used by Concentra Trust for any other purpose.

Accepted by Credit Union authorized officer, as agent

Date

Annuitant's Signature (not Contributor's if a Spousal Plan)