

Transfer-in guidelines

Client's last name	Client's first name	Client account number
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Locked-In Retirement Accounts: Transfer Guidelines

Please use this guideline to ensure that all necessary actions are taken and that all documentation is provided to the relinquishing and receiving institutions for all locked-in account transfers.

All documents are available online at www.sunlifeglobalinvestments.com

Locked-In Retirement Accounts – Transfer In¹

Required documentation	Yes	Comments
Transfer Authorization for Registered Investments	<input type="checkbox"/>	
Investment Application (if applicable)	<input type="checkbox"/>	
Locked-In Addendum (signed by Investor)	<input type="checkbox"/>	
Action required	Yes	Comments
Original copies of the documentation sent to the relinquishing institution	<input type="checkbox"/>	
Copies of the documentation sent to your Dealership	<input type="checkbox"/>	

Registered Accounts: Transfer Guidelines

Please use this guideline to ensure that all necessary actions are taken and that all documentation is provided to the relinquishing and receiving institutions for all registered account transfers.

All documents are available online at www.sunlifeglobalinvestments.com

Registered Accounts² – Transfer In³

Required documentation	Yes	Comments
Transfer Authorization for Registered Investments	<input type="checkbox"/>	
Investment Application (if applicable)	<input type="checkbox"/>	
Action required	Yes	Comments
Original copies of the documentation sent to the relinquishing institution	<input type="checkbox"/>	
Copies of the documentation sent to your Dealership	<input type="checkbox"/>	

¹ Locked-In transfers can take up to 6-8 weeks for completion

² Registered accounts: RRSP, RRIF, TFSA LRIF, LIF, RLIF, RLSP, PRIF, LRSP

³ Registered Transfers can take up to 3-4 weeks for completion