



Direct Transfer of a Single Amount – T2151

Under Subsection 147(19) or Section 147.3 (Non Locked-In and/or Locked-In Funds)

SECTION 1: APPLICANT INFORMATION

Form with fields: First Name, Last Name, Street Address, City, Prov, Postal Code, Telephone

SECTION 2: TRANSFERRING INSTITUTION

Form with fields: Plan Name, CRA Registration No., Tel, Address, BC Plan Registration No., Fax

SECTION 3: DESCRIPTION OF AMOUNT(S) TO BE TRANSFERRED

PART A – Transfer of NON LOCKED-IN Funds

Form with checkboxes and fields for RRSP, RRIF, and RPP transfers, including Plan Name, Fund Name, and CRA Registration #.

Form with fields: Institution#, Transit #, Receiving Financial Institution, Contact Person

Form with fields: Street Address, City, Prov, Postal Code, Telephone, Fax

Form with fields: Applicant Signature, Date

PART B – Transfer of LOCKED-IN Funds

Form with checkboxes and fields for LIRA, LIF, and RPP transfers, including Plan Name, Fund Name, and CRA Registration #.

Form with fields: Institution #, Transit #, Receiving Financial Institution, Contact Person

Form with fields: Street Address, City, Prov, Postal Code, Telephone, Fax

Form with fields: Applicant Signature, Date

SECTION 4: TRANSFEROR'S CERTIFICATION (To be completed by the UBC Pension Administration Office)

A. The total \$ transferred is the applicant's whole entitlement under the Plan identified in Section 2.
B. We have transferred \$ according to one of the following subsections: 147.3(1) to (8) (an RPP lump-sum transfer to an RRSP, RRIF, LIRA, LIF or RPP). BC PBSA locked-in provision does not apply.
C. BC PBSA locked-in provision applies to \$ of the amount we transferred from the RPP identified in Section 2, under the Pension Benefits Standards Act or a provincial pension benefits act.
D. We did not transfer \$ of the RPP single amount indicated in item A according to one of the following subsections: 147.3(1) to (7). We will report this amount as the applicant's income on a T4A slip.
I certify that the information given on this form is, to the best of my knowledge, correct and complete.

Form with fields: Name of Transferor, Signature of Authorized Person, Date

SECTION 5: TRANSFEREE'S CERTIFICATION (Must be completed by the Receiving Institution)

We have received \$, and we have credited it to the applicant's RRSP/RRIF/LIRA/LIF/RPP identified in Section 3. The plan to which the single amount has been transferred is registered under the Income Tax Act. We will administer the amount indicated in item C of Section 4 as a locked-in amount under the recipient fund or plan.
I certify that the information given on this form is, to the best of my knowledge, correct and complete.

Form with fields: Name of Authorized Officer, Title of Authorized Officer

Signature of Authorized Officer

Date

X