



# LUMP SUM PAYMENT/REFUND CONTRIBUTIONS AUTHORIZATION TO RBC INVESTOR SERVICES TRUST

ACCOUNT TITLE

DATE

ACCOUNT NUMBER

DAY MONTH YEAR

LANGUAGE PREFERENCE

English  French

Social Insurance Number: \_\_\_\_\_

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

### BANKING INFORMATION

Intermediary (Bank/Trust/etc.): \_\_\_\_\_

Account Number: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

### PAYMENT AMOUNT

Reciprocal Transfer \$ \_\_\_\_\_

Purchase of Annuity \$ \_\_\_\_\_

Cash Refund \$ \_\_\_\_\_

Death Benefit – relationship to deceased \$ \_\_\_\_\_

Transfer to an RRSP (Form T2151 attached) \$ \_\_\_\_\_

Transfer to a locked-in RRSP (Form T2151 and locked-in agreement attached) \$ \_\_\_\_\_

Excess contribution to an RRSP (Form T2151 attached) \$ \_\_\_\_\_

**TOTAL AMOUNT** \$ \_\_\_\_\_

### REMARKS OR SPECIAL INSTRUCTIONS

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**ACKNOWLEDGEMENT:** This is your authorization to make payment(s) from the fund above, which is hereby certified to be in full accordance with the terms of the Plan and Trust agreement governing such payments.

AUTHORIZED SIGNATURE

AUTHORIZED SIGNATURE

\_\_\_\_\_  
\_\_\_\_\_

DATE

DAY MONTH YEAR