



# TRANSFER AUTHORIZATION FOR REGISTERED INVESTMENTS (RSP, LIRA, LRSP, RIF, LIF)

This form can be used for RSP to RSP transfers, RSP to RIF transfers, and RIF to RIF transfers. This form replaces the T2033 form. For Locked-in accounts please also complete a Royal Trust Locked-in addendum.

## A. Client Identification

Account/Policy Holder Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial(s) \_\_\_\_\_

Address \_\_\_\_\_ Social Insurance Number \_\_\_\_\_

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

( ) \_\_\_\_\_ ( ) \_\_\_\_\_

Residence phone \_\_\_\_\_ Business phone \_\_\_\_\_ Date of Birth \_\_\_\_\_

## B. Receiving Institution Information (Please make cheque(s) payable to RBC Dexia Investor Services Trust c/o client)

**McLean Budden, 145 King St. W.,  
Suite 2525, Toronto, Ontario M5H 1J8  
Tel.: (416) 862-9800 1-800-884-0436  
Fax: (416) 862-9624**

Client Account/Policy Number \_\_\_\_\_

**Registered type:**  
 RRSP     RRIF     LIF  
 Spousal RRSP     Spousal RRIF  
 LIRA     LRSP

**Investment Instructions:**

Fund Name	Fund #	Investment Amount	or	%
McLean Budden Balanced Growth Fund	MBU 001	\$		%
McLean Budden Balanced Value Fund	MBU 009	\$		%
McLean Budden Canadian Equity Growth Fund	MBU 002	\$		%
McLean Budden Canadian Equity Fund	MBU 967	\$		%
McLean Budden Canadian Equity Value Fund	MBU 007	\$		%
McLean Budden High Income Equity Fund	MBU 867	\$		%
McLean Budden American Equity Fund	MBU 003	\$		%
McLean Budden Global Equity Fund	MBU 008	\$		%
McLean Budden International Equity Fund	MBU 006	\$		%
McLean Budden Fixed Income Fund	MBU 004	\$		%
McLean Budden Money Market Fund	MBU 005	\$		%
<b>Total</b>		\$		100 %

## C. Client Direction to Relinquishing Institution

Relinquishing Institution Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal code \_\_\_\_\_ Group Plan Number (if applicable) \_\_\_\_\_

( ) \_\_\_\_\_ ( ) \_\_\_\_\_

Phone number \_\_\_\_\_ Fax number \_\_\_\_\_

Contact name \_\_\_\_\_ Client Account/Policy Number \_\_\_\_\_

**Transfer:** (check one box only)  All in cash\*  Partial\* – as listed below or on attached list  
*\*Please refer to statement in bold in Client Authorization section below.*

Shares/ Unit	Dollars	Investments Amount	Symbol and/or Certificate number or Policy number	Investment Description
<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>			

For use by Relinquishing Institution  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Delay delivery until

## D. Client Authorization

I hereby request the transfer of my account and its investments as described above.  
**\* WHERE I HAVE REQUESTED A TRANSFER IN CASH, I AUTHORIZE THE LIQUIDATION OF ALL OR PART OF MY INVESTMENTS AND AGREE TO PAY ANY APPLICABLE FEES, CHARGES OR ADJUSTMENTS.**

Signature of Account Holder \_\_\_\_\_ Date \_\_\_\_\_ Irrevocable Beneficiary: I consent to the transfer of the account. \_\_\_\_\_ Date \_\_\_\_\_  
 Signature of Irrevocable Beneficiary (if applicable)

## E. For Use by Relinquishing Institution Only

**Registered type:**  RRSP  LIRA  LRSP  LIF  RRIF:  Qualified  Non Qualified  
**Spousal Plan:**  No  Yes – if yes, please provide spousal information: \_\_\_\_\_

Surname \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial(s) \_\_\_\_\_ Social Insurance Number \_\_\_\_\_  
 ( ) \_\_\_\_\_ ( ) \_\_\_\_\_ Date of Birth \_\_\_\_\_

**Locked In:**  No  Yes (Locked-In confirmation attached) – if yes: \_\_\_\_\_

Governing Legislation \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ Locked-In Funds Transferred \_\_\_\_\_

Contact name \_\_\_\_\_ Phone number \_\_\_\_\_ Fax number \_\_\_\_\_

\$ \_\_\_\_\_  
 Total Amount Transferred \_\_\_\_\_ Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_

**For McLean Budden Use Only:**  
 \$ \_\_\_\_\_  
 We have received: \_\_\_\_\_ Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_