

RRSP APPLICATION



14th Floor – 888 Dunsmuir Street
 Vancouver, BC V6C 3K4
 Phone: 604-683-2881 Fax: 604-683-5110
 Toll Free: 1-800-663-0324
 www.peoplestrust.com

Customer Number	Plan Number	Account Number
(For Office Use Only)		

Applicant Profile			
Name	Phone # (incl. area code)	S.I.N.	D.O.B. (DD/MM/YY)
Address	City	Province	Postal Code
Applicant Email	Occupation*	Employer	

Investment Details				
Guaranteed Retirement Term Investment - Minimum Deposit \$1,000.00				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contribution Amount	Issue Date (DD/MM/YY)	Maturity Date (DD/MM/YY)	Term (Years/Months)	Interest Rate (Compounded Annually)

Spousal Contributor Profile (If applicable)	
Name	S.I.N.

Beneficiary Designation (Optional):	
<p>You designate the beneficiary named below as your elected Beneficiary to the said Plan, whereby the Beneficiary will be entitled to all payments and benefits payable hereof in the event of your death. You hereby revoke any previous Beneficiary designated by you and shall ensure this designation is legal and binding pursuant to the applicable Provincial Territories and Federal Laws of Canada, while reserving the right to cancel this designation under the terms and conditions governing the Plan.</p>	
Beneficiary name (last, first, middle initial)	Relationship to Account Holder

Third Party Declaration:
Will this RRSP be used on behalf of anyone not disclosed on this application? (If yes, please provide details on a separate Third Party Information Form) <input type="checkbox"/> YES <input type="checkbox"/> NO

Politically Exposed Person (PEP)
Are you a PEP, a HIO, or a family member or close associate to a PEP or HIO? (If yes, please provide the specific details on a separate PEP Form) <input type="checkbox"/> YES <input type="checkbox"/> NO
<i>A PEP is an individual who holds or has held office or a senior position in or on behalf of a country, government, military, or judiciary, or, is or was a head of an international organization (HIO), a leader or president of an organization funded by multiple nations or states, regardless of their citizenship, residency status or birth place.</i>

Intended Use of Account:
<input type="checkbox"/> Saving/Investment <input type="checkbox"/> Vacation <input type="checkbox"/> Retirement <input type="checkbox"/> Education <input type="checkbox"/> Other (Please specify) _____

Application To Peoples Trust Company (TRUSTEE):			
<p>You hereby apply for a Peoples Trust Company Retirement Savings Plan and request that we apply for registration of this plan as a Registered Retirement Savings Plan under the provisions of the Income Tax Act (Canada) and applicable Provincial Income Tax Legislation of your resident Province. You acknowledge having read the Declaration of Trust and understand the terms, conditions and stipulations, including that tax may be payable on any benefit paid under the said Plan. You further declare that all interest rates, terms and fees have been fairly disclosed to you as set out in this agreement.</p>			
<table border="0" style="width: 100%;"> <tr> <td style="width: 33%;">Application Date</td> <td style="width: 33%;">Applicant Signature</td> <td style="width: 33%;">Authorized Branch/Representative Signature</td> </tr> </table>	Application Date	Applicant Signature	Authorized Branch/Representative Signature
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Acknowledgement Section
<p>By signing this application I/we acknowledge that: I/we have received, read and understand the Terms & Conditions. I/we consent to the collection, use and disclosure of my/our personal information as outlined in the Terms & Conditions. I/we consent to an identification check to confirm my/our identity. I/we hereby apply to be the Registered Holder(s) of the account as set out above.</p>
<p>Applicant Signature _____ Date _____</p>
<p>After completing this application form, send it together with your pre-printed personal cheque payable to yourself to: Peoples Trust Company, 1400 – 888 Dunsmuir Street, Vancouver, BC V6C 3K4</p>
<p>To transfer an existing RRSP from your other financial institution, visit our website: www.peoplestrust.com/high-interest-accounts/banking-with-us/banking-forms or call Vancouver: 604-331-3465 or Toll Free: 800-663-0324.</p>