

Form 7
Application to Withdraw
a Small Balance
Pension Benefits Act, 1997

Applicant Information

1	Name	Date of Birth	M M	D D	Y Y	Telephone	()
	Street, P. O. Box, Apt. #						
City or Town				Province		Postal Code	

LIRAs, LIFs, AND LRIFs Regulated by the Pension Benefits Act, 1997

2	I am the owner of the following LIRAs, LIFs, AND LRIFs regulated by the <i>Pension Benefits Act, 1997</i> (The Act) and the current value of each fund is:						
Name of Financial Institution						Value \$	_____
Name of Financial Institution						Value \$	_____
Name of Financial Institution						Value \$	_____
Name of Financial Institution						Value \$	_____
The total value of all LIRAs, LIFs, and LRIFs regulated by the Act:						TOTAL \$	=====
The Year's Maximum Pensionable Earnings under the <i>Canada Pension Plan</i> for the calendar year _____ is: \$ _____							

Value of Assets

3	Check one box only						
<input type="checkbox"/> I am eligible to receive an immediate pension income from the funds listed above and the total value of all these assets is less than 40 percent of the Year's Maximum Pensionable Earnings under the <i>Canada Pension Plan</i> for the calendar year in which this application is made.							
<input type="checkbox"/> The total value of all assets listed above is less than 10 percent of the Year's Maximum Pensionable Earnings under the <i>Canada Pension Plan</i> for the calendar year in which this application is made.							

Declaration of Owner

4	I declare and certify that						
A. The above information is based on the most recent information I have available,							
b. the information is less than one year old, and							
c. is accurate, to the best of my knowledge and belief.							
Signature of Owner				Signature of Witness			
_____				_____			
Date				Date			
Y Y Y Y M M D D / /				Y Y Y Y M M D D / /			

NOTE: If the owner is a former member of a pension plan from which the funds originated, and has a Principal Beneficiary, a waiver of a joint and survivor pension (Form 3) must be submitted with this application. Principal Beneficiary means the spouse of the former member or, where the former member has a cohabiting partner, the former member's cohabiting partner as defined in the Act.