

# Group Retirement Plan Contribution Authorization Form

## SECTION 1: EMPLOYER INFORMATION

\*Required Information

Plan Sponsor Name\*

Plan Type\*

☐ RRSP

☐ Non-Registered

☐ Spousal RRSP

☐ Pension Plan

☐ Other: \_\_\_\_\_

## SECTION 2: ANNUITANT INFORMATION >>> For a spousal RRSP, the Annuitant is the employee's spouse.

Surname\*

First Name and Initial\*

☐ Mr.  
☐ Ms

☐ Mrs.

Address\*

City or Town\*

Province\*

Postal Code\*

Contact Phone Number\*

Open Access Account Number

S.I.N.\*

Birthdate

Y Y Y Y / M M / D D

## SECTION 3: SPOUSE OR COMMON-LAW PARTNER CONTRIBUTOR >>> Complete this section only if this is a Spousal RRSP. Employee is the Contributor.

Surname\*

First Name and Initial\*

☐ Mr.  
☐ Ms

☐ Mrs.

S.I.N.\*

Birthdate

Y Y Y Y / M M / D D

## SECTION 4: PAYROLL DEDUCTION AUTHORIZATION

I hereby authorize my Employer (the Plan Sponsor) to deduct contributions for remittance into the plans that I have specified below.

Beginning date\*

Y Y Y Y / M M / D D

### Contributions to deduct per pay:

Plan type:	Regular Required	Additional Voluntary
<input type="checkbox"/> RRSP	_____ %	_____ %
<input type="checkbox"/> Spousal RRSP	_____ %	_____ %
<input type="checkbox"/> DCP	_____ %	_____ %
<input type="checkbox"/> Non-Registered	_____ %	_____ %

**PLEASE NOTE:** Your instructions will not be processed unless an Application Form and Investor Profile Form have been completed. If you are setting up a Spousal RRSP, your spouse or common-law partner must complete an Application Form and Investor Profile Form. You are the Contributor and your spouse or common-law partner is the Annuitant or account owner of the Spousal RRSP.

## SECTION 5: INITIAL DEPOSIT (OPTIONAL)

Amount of initial deposit \$ \_\_\_\_\_

Please make the cheque payable to 'Canadian Western Trust Company' in Trust and attach it this form.

## SECTION 6: AUTHORIZATION

Signature of Account Owner\*

Date\*

Y Y Y Y / M M / D D

**When complete forward this form to your Human Resources Contact.**

Directions to the Plan Sponsor

If the payroll contribution of this plan member are being distributed among multiple plans or to a Spousal RRSP, a copy of this form must be included in the document forwarded to Open Access Ltd. If this plan member is making an initial deposit, forward the cheque along with a copy of this form to Open Access Ltd.

Open Access <sup>TM</sup> Limited, 1 Richmond St. W, Suite 701, Toronto, ON M5H 3W4

Phone: 1 (866) 625 4777, Fax: (416) 955 4878, Toll Free: 1 (866) 955 4878

This form is available on the Open Access website at [openaccessltd.com](http://openaccessltd.com)

Annuitants - please retain copies of the Declaration attached for your records.