

## HOME BUYERS' PLAN (HBP) REQUEST TO WITHDRAW FUNDS FROM AN RRSP

Use this form to make a withdrawal from your registered retirement savings plan (RRSP) under the Home Buyers' Plan (HBP). Answer the questions in Part A of Area 1 to determine if you are eligible to make a withdrawal from your RRSP under the HBP. Although some conditions may apply to another person in certain situations, you (the participant) are responsible for making sure that all the conditions are met. For more details about the HBP, see Guide RC4135, *Home Buyers' Plan (HBP)*. **Generally, you must receive all your HBP withdrawals in the same calendar year. The maximum you can withdraw after January 27, 2009, for participation that begins for 2009 or a later year is \$25,000.** Complete Area 1 and give the form to your financial institution.

### Area 1 – To be completed by the participant

#### Part A – Complete the following questionnaire to determine if you can make a withdrawal from your RRSP under the HBP.

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| <p>1. Are you a resident of Canada?<br/>Yes <input type="checkbox"/> Go to question 2. No <input type="checkbox"/> You cannot make an HBP withdrawal.</p> <p>2. Has the person who is buying or building a qualifying home entered into a written agreement to do so?<br/>Yes <input type="checkbox"/> Go to question 3(a). No <input type="checkbox"/> You cannot make an HBP withdrawal.</p> <p>3a). Have you ever, before this year, withdrawn funds from your RRSP under the HBP to buy or build a qualifying home?<br/>Yes <input type="checkbox"/> Go to question 3(b). No <input type="checkbox"/> Go to question 4(a).</p> <p>3b). Are you making this request in January as part of the participation you began last year?<br/>Yes <input type="checkbox"/> Go to question 4(a). No <input type="checkbox"/> Go to question 3(c).</p> <p>3c). Was your repayable balance from your previous HBP participation zero on January 1 of this year?<br/>Yes <input type="checkbox"/> Go to question 4(a). No <input type="checkbox"/> You cannot make an HBP withdrawal.</p> | <p>4a). Are you a person with a disability?<br/>Yes <input type="checkbox"/> Go to question 5. No <input type="checkbox"/> Go to question 4(b).</p> <p>4b). Are you withdrawing funds from your RRSP to buy or build a qualifying home for a related person with a disability or to help such a person buy or build a qualifying home?<br/>Yes <input type="checkbox"/> Go to question 5. No <input type="checkbox"/> Go to question 4(c).</p> <p>4c). Are you considered a first-time home buyer?<br/>Yes <input type="checkbox"/> Go to question 5. No <input type="checkbox"/> You cannot make an HBP withdrawal.</p> <p>5. Does the person who is buying or building the qualifying home intend to occupy it as his or her principal place of residence no later than one year after buying or building it? If you are acquiring the home for a related person with a disability or helping a related person with a disability acquire the home, you must intend that the related person with a disability occupy the home as his or her principal place of residence.<br/>Yes <input type="checkbox"/> Go to question 6. No <input type="checkbox"/> You cannot make an HBP withdrawal.</p> <p>6. Has the person who is buying or building the qualifying home or his or her spouse or common-law partner owned the home more than 30 days before receiving this withdrawal?<br/>Yes <input type="checkbox"/> You cannot make an HBP withdrawal. No <input type="checkbox"/> You are eligible (complete Part B).</p> |
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#### Part B – Complete this part to make a withdrawal from your RRSP under the HBP.

First name and initials		Last name		Social insurance number (SIN)			
Address of <b>qualifying home being bought or built</b> (include number, street, rural route, or lot and concession number)						If you are a person with a disability, check this box. <input type="checkbox"/>	
City	Province or Territory	Postal code	Telephone number				
If you answered "Yes" to question 4(b) above, provide the following information about that person:							
Person's name		Relationship to you		SIN of person with the disability			

#### Part C – Certification

Amount of requested withdrawal \$ _____	Date withdrawal required	Year	Month	Day
I certify that the information given in Area 1 of this form is correct.	Date	Year	Month	Day
_____ Participant's signature	Account number of the RRSP from which the withdrawal is made			

#### Area 2 – To be completed by the RRSP issuer (Do not send this form to the CRA. Keep it for your records.)

Issuer's name	Telephone number	Amount paid (maximum \$25,000) for 2009 or a later year for withdrawals made after January 27, 2009. \$ _____
Issuer's address	Date withdrawal paid	Year   Month   Day

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