Canada Revenue Agency | Agence du revenu du Canada

SPOUSE TRANSFERS UNDER SUBSECTION 146.3(14.1) OF THE INCOME TAX ACT (Canada)

[illegible]

Part A – Annuitant

Last name	First name and initial(s)	Social insurance number
Address		Postal code

Part B – Transfer from an RRSP or a RRIF

☐ I am the annuitant under the registered retirement savings plan (RRSP). Annuitant's name and initial(s): _____

☐ I am the annuitant under the registered retirement income fund (RRIF). Annuitant's name and initial(s): _____

Name of RRSP issuer or RRIF issuer	Address

Part C – Description of amount to be transferred

☐ Please transfer $ _____ or all of the property ☐ the amount or $ _____ or ☐ _____ percent of the property held in my RRSP or RRIF under subsection 146.3(1) of the Income Tax Act ☐ in cash ☐ in kind.

☐ Except for the exempt property, please transfer the amount or property in the same proportion as the value of the property or ☐ the amount or $ _____ or _____ percent of the property held in my RRSP or RRIF under subsection 146.3(1) of the Income Tax Act ☐ in cash ☐ in kind.

Part D – Instructions for issuer of the RRSP, RRIF, or DPSP that I am now transferring from

☐ Please transfer the above-described RRSP property to my RRSP. Annuitant's name and initial(s): _____

☐ Please transfer the above-described RRSP or RRIF property to my RRIF. Annuitant's name and initial(s): _____

☐ Please transfer the above-described RRSP or RRIF property to my DPSP. Annuitant's name and initial(s): _____

Name of RRSP issuer, RRIF issuer, or DPSP administrator	Address

Date	Annuitant's signature	☐ Check if this is a revocation

Part E – Transferee

☐ I am aware of the spousal amount for a Registered Retirement Savings Plan (RRSP) or a Registered Retirement Income Fund (RRIF) as a deduction under the prior or current Subsection 146.3(14.1) of the Income Tax Act. I am the spouse or common-law partner of the annuitant of the RRSP or a RRIF. I am a resident of Canada and I will include the amount described in Part C in my income for the current year.

☐ I am aware that I will be subject to the provisions of the Income Tax Act in the event that I do not include the amount described in Part C in my income for the current year.

☐ I am aware that the amount described in Part C will be subject to withholding tax under Subsection 153(1) and Regulation 105 of the Income Tax Act if I do not include the amount described in Part C in my income for the current year.

Name of issuer	
Annuitant's signature	Date

Part F – Transferor (Do not issue a T4RSP or T4RIF slip for the amount transferred.)

☐ We have transferred $ _____ from the RRSP or RRIF identified in Part A or, in the transferee spouse or common-law partner's name, the Registered Retirement Savings Plan (RRSP) or the RRIF, the Deferred Profit Sharing Plan (DPSP) or the Pooled Registered Pension Plan (PRPP) specified in Part D, on behalf of the annuitant.

☐ Yes ☐ No ☐ Please not applicable

☐ Yes ☐ No ☐ Please not applicable

☐ Yes ☐ No ☐ Please not applicable

Spouse or common-law partner	Last name	Initial(s)	Social insurance number

☐ The spousal or common-law partner's contribution $ _____ as a deduction in accordance with the Income Tax Act, the amount specified in Part C of this form, or a combination of both, for the year.

The remaining balance, if any, will be treated as a contribution to a RRSP or a RRIF.

☐ Please not apply

I certify that the information given on this form is correct and complete.

Name of issuer	
Authorized person's signature	Date

Part G – Issuer of the RRSP/RRIF (Do not issue an official receipt for the amount transferred.)

We have received $ _____ for transfer and additional value according to Income Tax Regulation, Section 8.

Name of issuer	
Authorized person's signature	Date

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For any questions, visit our website at www.canada.ca/cra-contact or call us at 1-800-959-8281.

Canada

Copy 1 – For the transferee