



Set up your RSP/RIF/TFSA Direct Transfer to ING DIRECT Funds Limited in 2 easy steps

Step 1: Complete this Direct Transfer Form or a T2033 to transfer your RSP, RIF or TFSA from another financial institution to ING DIRECT Funds Limited.
Step 2: Mail your Direct Transfer of RSP/RIF/TFSA Form or T2033 to ING DIRECT Funds Limited or fax it to 416-497-8908 or 1-877-464-7797. If this Transfer is your first deposit into your ING DIRECT Mutual Fund Account, please remember to include your Mutual Fund Enrollment Form.
 For a description of the terms used in this form, please see reverse.
We will take care of the transfer for you.

Please tell us about yourself

MR. MRS. DR.
 MS. MISS

FIRST NAME		INITIAL	LAST NAME	
Address:				
STREET		CITY	PROVINCE	POSTAL CODE
Telephone:		Email:		
Social Insurance Number (MUST BE COMPLETED):		Date of Birth (MUST BE COMPLETED):		
		DAY	MONTH	YEAR

Transfer information (See reverse for description of terms.) **Receiving Institution Information**

I wish to transfer (Please check appropriate boxes):
IN CASH ONLY
A) All funds in my existing RSP
B) _____ from my existing RSP
C) All funds in my existing RIF
D) _____ from my existing RIF
E) All funds in my existing TFSA
F) _____ from my existing TFSA

Please transfer my RSP/RIF/TFSA to: ING DIRECT Funds Limited
 103 - 111 Gordon Baker Rd., Toronto, Ontario M2H 3R1
 RSP RIF TFSA
 RSP Plan #145-680 RIF Plan # 1203 TFSA Plan # 01450030

From the following institution:
 Reference/Plan number: _____
 Maturity date: _____ (IF APPLICABLE)
 Issuer of Plan: _____ FINANCIAL INSTITUTION
 Address of issuer: _____

ING Direct Funds Limited Account Number: _____ (IF APPLICABLE)
Investment Instructions:
 Streetwise Balanced Income Fund \$ _____
 Streetwise Balanced Fund \$ _____
 Streetwise Balanced Growth Fund \$ _____
 Streetwise Equity Growth Fund \$ _____

Annuitant/Holder Signature: X _____
Date: _____

Please attach a copy of most recent statement.

Financial Institution Use Only

This section to be completed by the Transferor (other financial institution).
 Amount transferred \$ _____ from RSP/RIF or TFSA identified above.
 Please check one: Spousal RSP/RIF No Yes
 Name of contributor spouse: _____ SIN of contributor spouse: _____
 Please check one: Locked-in Plan No Yes \$ _____ of the enclosed cheque represents locked-in benefits. These funds must continue to be administered as locked-in as required by the Pension Benefit Standards Act or a Provincial Act.
 Applicable Pension Legislation Federal or Provincial _____
 Please check if institution requires a copy returned.
Authorized Signature: X _____ **Position or Office:** _____ **Date:** _____

This section to be completed by the Transferee (ING DIRECT Funds Limited) upon receipt of the funds.
 We agree to the above for a direct transfer of property in the amount of \$ _____. We have received the property and will credit it to the annuitant under the Plan. No receipt for tax purposes will be issued for the amount transferred.
Authorized Signature: X _____ **Position or Office:** _____ **Date:** _____



Transfer information

A) If you check this box, you wish to transfer your entire RSP.

When you transfer in cash, all your investments will be liquidated and converted to cash before they are transferred.

B) If you check this box, you wish to transfer only a portion of your RSP. When you transfer in cash, the investments you specify will be liquidated and converted to cash before they are transferred.

Note: Please attach a copy of your most recent RSP statement indicating which investments you would like us to transfer.

C) If you check this box, you wish to transfer your entire RIF.

When you transfer in cash, all your investments will be liquidated and converted to cash before they are transferred.

D) If you check this box, you wish to transfer only a portion of your RIF. When you transfer in cash, the investments you specify will be liquidated and converted to cash before they are transferred.

Note: Please attach a copy of your most recent RIF statement indicating which investments you would like us to transfer.

E) If you check this box, you wish to transfer your entire TFSA.

When you transfer in cash, all your investments will be liquidated and converted to cash before they are transferred.

F) If you check this box, you wish to transfer only a portion of your TFSA. When you transfer in cash, the investments you specify will be liquidated and converted to cash before they are transferred.

Note: Please attach a copy of your most recent TFSA statement indicating which investments you would like us to transfer.

Locked-in plans – These plans generally take longer to transfer, as additional documents are required in order for us to administer the account, as set out under various Provincial and Federal Legislation. Please ensure you have the correct Federal or Provincial Locked-in Agreement for the jurisdiction in which your Plan is currently registered.

Spousal plans – If you are transferring a Spousal RSP or RIF, please ensure that you have opened a Spousal RSP or RIF at ING DIRECT Funds Limited so that there is no delay in the transfer process.

How much will it cost to transfer my account? – Most institutions charge a Transfer-out fee for which the cost will vary. You should check with the institution you are transferring from to determine what the fees are. ING DIRECT Funds Limited does not charge any fees to transfer your account.

How long will my transfer take? – Transfers can take anywhere from 2-6 weeks to be completed. The amount of time taken will depend on the institution you are transferring from.

This form replaces Form T2033 and should be used when requesting the transfer of funds under paragraphs 146(16)(a) or 146.3(2)(e) of the Income Tax Act (Canada).

Please note that this form is also used to record a qualifying transfer of a TFSA under subsection 207.01(1) of the Income Tax Act.

Definitions

Reference/Plan number – The number for the account you wish us to transfer.

Maturity date – The date your investment(s) mature (some don't have a maturity date).

Issuer of Plan – Name of the institution you are transferring from.

Address of issuer – The address of the institution you are transferring from. (This is where this Direct Transfer Form will be sent.)

ING DIRECT Funds Limited Account Number – If you already have an RSP, RIF or TFSA Account with ING DIRECT Funds Limited that you wish us to deposit the transfer proceeds into, please indicate. Fax or mail your Enrollment Form with your Direct Transfer Form.

Investment instructions – Please indicate into which funds you wish us to invest the transfer proceeds, once they arrive at ING DIRECT Funds Limited.