

# RSP Enrollment Form



For information on how to complete this Form, see instructions on the inside.

## Please tell us what type of RSP Plan you would like to open.

Individual RSP Plan

**OR**

Spousal RSP Plan (spouse or common law partner) **Important:** If opening a Spousal RSP, the Plan holder is the annuitant of the Plan and the contributor/tax payer is issued the contribution receipt.

## Please tell us about the Plan holder (the annuitant of the Plan).

MR.  MRS.  DR.  
 MS.  MISS

\_\_\_\_\_  
FIRST NAME INITIAL LAST NAME

Address:

\_\_\_\_\_  
UNIT STREET

\_\_\_\_\_  
CITY PROVINCE POSTAL CODE

Social Insurance Number  
*(Must be completed):*

Date of Birth  
*(Must be completed):*

DAY MONTH YEAR

Residence Telephone: \_\_\_\_\_

Business Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Occupation *(Must be completed):* \_\_\_\_\_

## Spousal Plans only (please tell us about the contributing spouse).

MR.  MRS.  DR.  
 MS.  MISS

\_\_\_\_\_  
FIRST NAME INITIAL LAST NAME

Social Insurance Number  
*(Must be completed):*

Date of Birth  
*(Must be completed):*

DAY MONTH YEAR

## Select the Account you wish to open.

RSP Investment Savings Account  
Deposit amount: \$ \_\_\_\_\_

Log on to [ingdirect.ca](http://ingdirect.ca) or call us at 1-800-ING DIRECT for current rate information or if you would like to open an RSP GIC.

## Complete this section if you would like to designate a beneficiary.

Designation of beneficiary

I designate the person below as beneficiary. All amounts under this Plan will be payable to this surviving beneficiary, in the event of my death.\*

MR.  MRS.  DR.  
 MS.  MISS

\_\_\_\_\_  
FIRST NAME INITIAL LAST NAME

Relationship: \_\_\_\_\_

(a) I hereby revoke any prior designation made by me with respect to this Plan;

(b) The beneficiary designated herein must survive me and accept this designation in order to receive the amounts payable under this Plan.

\* Note, your designation of a beneficiary is subject to applicable law. You may wish to discuss this designation with your legal advisor. If no beneficiary is designated, all amounts under this Plan will be payable to your estate and distributed in accordance with applicable law. Not valid in Québec.

Manitoba Residents: Your designation of a beneficiary by means of a designation form will not be revoked or changed automatically by any future marriage or divorce. Should you wish to change your beneficiary in the event of a future marriage or divorce, you will have to do so by means of a new designation.

**Other information; please answer the following: *This section must be completed.***

Anti-money laundering legislation requires us to obtain the following information. This section is mandatory and we cannot open your account without this information, which will remain strictly confidential.

What will the funds in this account be used for?

Personal Savings OR  Other

If Other, please specify here:

Will this account be used by or on behalf of another party who is not registered on the account?  NO  YES

If YES, please call 1-800-ING DIRECT (1-800-464-3473).

**I apply to open an ING DIRECT RSP Account.**

I acknowledge that I have read and consent to the ING DIRECT Account Terms. I hereby make application to participate in the ING Bank of Canada Retirement Savings Plan. I request that ING Bank of Canada apply for registration of my Plan in accordance with section 146 of the Income Tax Act, and if necessary, with any Provincial Tax Act. I also confirm that I have read the ING DIRECT Privacy Code and I consent to the collection, use and disclosure of my personal information in accordance with the Privacy Code, as amended from time to time.

Annuitant Signature: **X**

Date:

\_\_\_\_ DAY    \_\_\_\_ MONTH    \_\_\_\_ YEAR

Authorized ING DIRECT Officer:



Open your RSP Account by completing the Enrollment Form on the first page, following the instructions below:

### Tell us what type of RSP Plan you would like to open:

- Please indicate whether you would like to open an individual RSP Plan (you are the annuitant/Plan holder and the contribution receipt will be in your name) or whether the Plan is a spousal Plan (the person **not** getting the contribution receipt is the annuitant/Plan holder of the RSP Plan and the contributor is issued the receipt).

### Tell us about the annuitant/Plan holder:

- To ensure that your RSP Account is opened promptly, please check that all sections of this box are correct and complete, including the annuitant's/Plan holder's name, address, home and business telephone numbers, Social Insurance Number, date of birth and e-mail address.
- You must provide your date of birth and Social Insurance Number (SIN). This allows us to establish your identification and is a legal requirement for interest reporting.

### Spousal Plans only (tell us about the contributing spouse):

- Please provide the spousal contributor's full name, Social Insurance Number (SIN), and date of birth.

### Select the RSP Account(s) you wish to open:

- Please place an X in the box to indicate your selection to open an RSP Investment Savings Account as well as the amount you wish to deposit into the account.
- Once your initial deposit is processed, log on to [ingdirect.ca](http://ingdirect.ca) or call us at **1-800-ING DIRECT** if you would like to open an RSP GIC.

### To designate a beneficiary:

- You may designate a beneficiary by indicating in writing the full legal name of the beneficiary and your relationship to the individual. Please note that the designation of a beneficiary is subject to applicable law. You may wish to discuss this designation with your legal advisor. If no beneficiary is designated, all amounts under this account(s) will be payable to your estate and distributed in accordance with applicable law.

### Why we ask about other information:

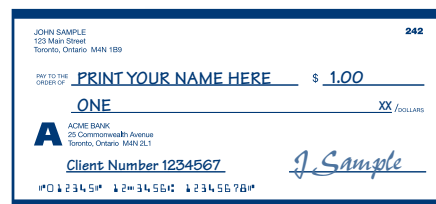
- In order to fulfill regulatory obligations, ING DIRECT must ask all Clients what the funds in the account will be used for and if the account will be used by or on behalf of another party. If you are opening a spousal RSP Plan, your spouse is **not** considered another party.

### Open your RSP Account in 3 easy steps:

1. Complete and sign the Enrollment Form.
2. For Individual RSP Plans: Ensure that you, the Annuitant/Plan holder, write a personal pre-printed cheque payable to yourself drawn on a Canadian bank for the amount you wish to deposit to your RSP.  
For Spousal RSP Plans: The Annuitant/Plan holder **must** submit a personal pre-printed cheque drawn on a Canadian bank, from his/her own chequing account payable to himself/herself for at least \$1.00. This step is mandatory and is required for regulatory identification purposes.
3. Please mail the Form and cheque(s) to:  
**ING DIRECT, 111 Gordon Baker Road, Toronto, ON M2H 3R1**

Once your cheque has cleared, call us to confirm your banking information and set up your PIN and password.

ING DIRECT will use the banking information on your cheque to establish a link. This link will allow you to electronically transfer funds from your chequing account to your ING DIRECT RSP Investment Savings Account. With your PIN and Client Number, you have everything you need to access your Account 24 hours a day, seven days a week.



Example of a personal pre-printed cheque