

# RSP Enrollment Form

For information on how to complete this Form, see page 3.



ING DIRECT

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

**Individual RSP Plan**     **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.  MS.  MRS.  MISS  DR.

First Name: \_\_\_\_\_ INITIAL \_\_\_\_\_

Last Name: \_\_\_\_\_

Address: \_\_\_\_\_ UNIT \_\_\_\_\_ STREET \_\_\_\_\_

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

**Social Insurance Number (MUST BE COMPLETED):** \_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_  
**Date of Birth: (MUST BE COMPLETED):** \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
D D / M M / Y Y

Residence Telephone: (\_\_\_\_) \_\_\_\_\_-\_\_\_\_\_  
Business Telephone: (\_\_\_\_) \_\_\_\_\_-\_\_\_\_\_  
Ext: \_\_\_\_\_

E-mail: \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_-\_\_\_\_\_  
Occupation: (MUST BE COMPLETED): \_\_\_\_\_

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

MR.  MS.  MRS.  MISS  DR.

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

**Social Insurance Number (MUST BE COMPLETED):** \_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_  
**Date of Birth: (MUST BE COMPLETED):** \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
D D / M M / Y Y

**RSP Investment Savings Account**  
Deposit amount: \$ \_\_\_\_\_,\_\_\_\_\_.\_\_\_\_

**RSP GIC Account**  
Deposit amount: \$ \_\_\_\_\_,\_\_\_\_\_.\_\_\_\_

Please select the term for your GIC: \_\_\_\_\_

If you wish to open a GIC but do not select a term, the funds will automatically be invested in a 1-year term. When you open your GIC, we will automatically create a companion Investment Savings Account as a fast and easy way to move money. Interest for 90-day, 180-day, and 270-day GIC terms is calculated daily and paid at maturity. Interest for annual GIC terms is compounded annually and paid at maturity, unless otherwise instructed.

**For current rate information,  
log on to [www.ingdirect.ca](http://www.ingdirect.ca) or  
call us at 1-800-ING DIRECT.**





## Open your RSP Account by completing the Enrollment Form, 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 as well as the amount you wish to deposit into this RSP Account.
- For RSP GIC Accounts, remember to select the term you wish to invest in.

### 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 RSP 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.



Example of a personal pre-printed cheque

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.