

Renaissance Documentation Package: Lump Sum Withdrawal By Non-Resident Under Manitoba Pension Legislation

2. Certification by Annuitant regarding spouse/common-law partner: You certify that
- You **do not** have a spouse/common-law partner within the special meaning of these terms set out below, or if you do, at this time you **are** living separate and apart from your spouse/common-law partner by reason of a breakdown of your relationship.

OR

- You **do** have a spouse/common-law partner within the special meaning of these terms set out below, and at this time you are not living separate and apart from your spouse/common-law partner by reason of a breakdown of your relationship.

The Manitoba Pension Regulation defines a "spouse" as the individual who is married to you and the *Manitoba Pension Act* defines common-law partner as:

- a) a person who, with you has registered a common-law relationship under 13.1 of *The Vital Statistics Act*, or
b) a person who, not being married to you, cohabited with you in a conjugal relationship and has
- i) for a period of at least three years, if either of you is married; or
 - ii) for a period of at least one year, if neither of you is married.

Name of Spouse/Common-law Partner

3. You request the Administrator as indicated above to withdraw the balance in your Plan and:

Check one:

- Transfer proceeds of your Plan to an existing RRSP/RRIF, account number _____, or
- Transfer proceeds of your Plan, less any applicable withholding taxes, to an existing non-registered account, account number _____, or
- Issue a cheque for the amount of the withdrawal from your Plan, less any applicable withholding taxes.

If you have indicated above that you have a spouse/common-law partner you consent that the Administrator can provide the Part 1 Withdrawal Request along with the Part 2 Statement of Information.

Date (mm/dd/yyyy)

Date (mm/dd/yyyy)

Signature of Annuitant

Accepted by (title of person signing) for Administrator CIBC Asset Management Inc.

Part 2: Statement of Information to Annuitant and Spouse/ or Common-law Partner if Applicable

The information below is to be provided within 60 days after the Administrator receives the completed Part 1 Withdrawal Request

- to the Annuitant,
- and in the case of an Annuitant who is a member-owner with a spouse/common-law partner, to that spouse/common-law partner.

Annuitant's Name

LIRA or LIF (the "Plan") Account No.

Date of Part 1 Withdrawal Request

The balance of the Plan as of date of Part 1 Withdrawal Request

\$ _____

Date of Statement of Information (mm/dd/yyyy)*

Accepted by (title of person signing) for Administrator CIBC Asset Management Inc.

*Note: This amount will be reduced by any amounts that are or may become payable under a division of property on the breakdown of marriage, or as a result of an order under *The Garnishment Act* and/or *The Family Maintenance Act*.

Internal Purposes Only:

- Is the amount to be withdrawn subject to a division of property to a person who is living separate and apart from the Annuitant at the time of the withdrawal request?
- Is the amount to be withdrawn subject to an order under *The Garnishment Act* and/or *The Family Maintenance Act*?

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Part 3: Application for Lump Sum Withdrawal

Date of Part 2 Statement of Information

Annuitant Information

Name of Annuitant (as identified in Part 1 Withdrawal Request)

Current Value of the Plan in Part 2 Statement of Information

\$ _____

Amount* Available for Lump Sum Withdrawal

\$ _____

***Note:** This amount will be reduced by any amounts that are or may become payable under a division of property on the breakdown of marriage, or as a result of an order under *The Garnishment Act* and/or *The Family Maintenance Act*.

You, _____ the Annuitant, hereby make an application for the withdrawal further to the attached Part 1 Withdrawal Request dated _____. In addition, you have provided:

1. Written confirmation from the Canada Revenue Agency that you are a non-resident of Canada for the purposes of the Income Tax Act (Canada) and have had that status for at least two years.
2. If you indicated in Part 1 Withdrawal Request Form that you have a spouse/common-law partner with whom you are not living separate and apart by reason of a breakdown of your relationship, you confirm that you; (i) provided your spouse/common-law partner a copy of the Part 2 Statement; and (ii) you attach a signed Form 3 "Consent to Withdrawal For Non-Residency Status".

Date (mm/dd/yyyy)

Signature of Annuitant

For Internal Use Only: Date balance paid to Annuitant

I, _____, am the spouse or common-law partner of _____
(insert name of spouse or common-law partner)

_____ (the Annuitant) within the meaning of *The Pension Benefits Act* of Manitoba (Act).
(insert name of Annuitant)

An application for a withdrawal from the above noted Plan will reduce the amount available to you as the spouse or common-law partner of the annuitant, in the following situations;

- on the death of the annuitant,
- in the event of a division of property on relationship breakdown, and
- on the income that will be available from the LIF in future years.

I consent to the lump sum withdrawal of the amount identified above under the small amounts provision and date this consent in the presence of a witness.

Dated at _____, _____
City/Town Province

this _____ day of _____, _____
Day Month Year

Signature of Spouse or Common-law Partner