

How to Complete the T2033

This is an example of how to fill out the T2033 form. Do not use this copy. Follow the instructions in **blue**, and use the Canada Revenue Agency link to complete your own T2033 form.

Scenario

RRSP funds may be transferred directly to the pension plan to pay for a buyback. To request the transfer, the T2033 form may be used. Please include your Financial Institution's Transfer Dept. Fax number.



Canada Revenue
Agency

Agence du revenu
du Canada

Protected B when completed

Direct Transfer Under Subsection 146.3(14.1), 147.5(21) or 146(21), or Paragraph 146(16)(a), or 146.3(2)(e)

Use this form to record a direct transfer. For instructions and definitions, go to the last page of this form.

Legislative references on this form are to the Income Tax Act (ITA).

Section 1 – Annuitant or Member

Last name Doe	First name and initials John A.B.	Social insurance number (SIN) 1 2 3 4 5 6 7 8 9
Address 111 Main Street, Edmonton, Alberta		Telephone number 555-555-5555

Part A – Transfer from an RRSP, a RRIF, an SPP, or a PRPP

☒ I am the annuitant under the registered retirement savings plan (RRSP).

☐ I am the annuitant under the registered retirement income fund (RRIF).

☐ I am a member of the specified pension plan (SPP).

☐ I am a member of the pooled registered pension plan (PRPP).

RRSP plan number and name

RRSP or LIRA account number

RRIF fund number and name

SPP plan number and name

PRPP plan number and name

Name of RRSP issuer, RRIF carrier, SPP or PRPP administrator

Financial Institution name

Address of RRSP issuer, RRIF carrier, SPP or PRPP administrator

Financial Institution address

Part B – Description of amount to be transferred

1. For transfers from an RRSP, SPP or a PRPP:

Describe the property to be transferred, tick **one** box:

☐ all of the property ☒ part of the property in a one-time payment ☐ part of the property in several payments

If the amount of the transfer is **all or part** of the property in a one-time payment, enter the amount \$ **amount**

If the transfer is to be made in several payments, enter the number of payments _____, enter the amount of the payments \$ _____

I request the transfer of the amount above, which represents **all or part** of the property of my unmatured RRSP, or my account under an SPP or PRPP

identified in Part A, tick **one** box: ☒ in cash or ☐ in kind.

2. For a transfer from a RRIF:

Except for enough property to pay me the minimum amount this year, please transfer, tick **one** box:

☐ all of the property ☒ **None of the plans that APS administrators can accept a transfer from an RRIF**

I request the transfer of the amount above, which represents **all or part** of the property of my RRIF identified in Part A, tick **one** box: ☐ in cash or ☐ in kind.

Please write your financial institutions' transfer department fax number here

if removing:

- **all funds** from RRSP/LIRA, check off **"all of the property"**.
- **a portion of RRSP/LIRA**, check off **"part of the property in a one-time payment"**.

"in cash" always checked. Never "in kind".

Continued on next page

Part C – Identifying the RRSP, RRIF, RPP, SPP, PRPP or annuity to which the funds are being transferred

- ☐ Transfer the RRSP, SPP, or PRPP property described in Part B to my RRSP:
- ☐ Transfer the RRSP, RRIF, SPP, or PRPP property described in Part B to my RRIF:
- ☐ Transfer the RRSP, RRIF, or PRPP property described in Part B to my SPP:
- ☒ Transfer the RRSP, RRIF or PRPP property described in Part B to my registered pension plan (RPP):
- ☐ Transfer the SPP or PRPP property described in Part B to my annuity:
- ☐ Transfer the RRSP, RRIF, SPP, or PRPP property described in Part B to my PRPP:

RRSP individual plan number and name

RRIF individual fund number and name

SPP member plan number and name

RPP registration number and name

Name of plan and registration number

Annuity individual fund or plan number and name

PRPP member plan number and name

Name of RRSP or annuity issuer, RRIF carrier, or RPP, SPP, or PRPP administrator

Alberta Pensions Services Corporation

Address of RRSP or annuity issuer, RRIF carrier, or RPP, SPP, or PRPP administrator

5103 Windermere Blvd SW, Edmonton AB, T6W 0S9

Member's signature

or ☐

See attached letter.

Year Month Day
YYYY MM DD

Annuitant's or Member's signature

Section 2 – Transferee

1. We agree to the above requested direct transfer. When we receive the property, we will credit it to the annuitant or member under the plan or fund identified in Part C of Section 1. If the plan or fund is an RRSP or a RRIF that conforms to a specimen plan or fund, it will conform with the specimen identified as:

Specimen plan or fund number and name

We will check the plan or fund identification in Part C of Section 1 and add or correct information as necessary.

Administrator's portion

2. The plan or fund is registered under the ITA or, if the plan or fund is not registered, we will apply for such registration.

Transferee's name

Authorized

**Plan
Registration
Numbers**

LAPP: 02 – 16556

PSPP: 02 – 08769

MEPP: 05 – 70887

SFPP: 05 – 84375