



## Lump sum contribution to a group retirement plan

Return to Canada Life, Group Retirement Services

255 Dufferin Avenue, T540, London, ON N6A 4K1

To be completed by a plan member/contributor who is making a voluntary lump sum contribution to a group retirement plan.

**Please note that your plan must allow you to make additional lump sum contributions.**

### EMPLOYER/PLAN SPONSOR

Name of employer/plan sponsor

Policy/plan number

*NextStep*

### CONTRIBUTION MADE BY:

Last name

Middle Initial

First name

Certificate number

I am attaching a cheque (payable to Canada Life) in the amount of \$\_\_\_\_\_ to be deposited as follows:

- ☐ To my Registered Retirement Savings Plan, as a personal contribution for myself.
- ☐ To my Registered Retirement Savings Plan, as a contribution for my spouse (I am the spousal contributor).  
My spouse's certificate number is \_\_\_\_\_.

Please invest this contribution as follows:

- ☐ According to my (or my spouse's) current investment allocation instructions.
- ☐ According to the following special instructions for this contribution only:

| Percentage | Name of fund / identifier | Percentage | Name of fund / identifier |
|------------|---------------------------|------------|---------------------------|
| % to       |                           | % to       |                           |
| % to       |                           | % to       |                           |
| % to       |                           | % to       |                           |

**Total allocation must equal 100%. Note that in some cases your plan sponsor controls investment allocation instructions.**

Signature of person contributing

Date

Signature of spouse\*

Date

\*Only required if contributions are directed to a spouse, *and* special investment instructions apply.

Contact information 1-800-724-3402 or [grsaccess.com](http://grsaccess.com)  
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