

☐ National Bank of Canada
☐ National Bank Trust Inc.
☐ Natcan Trust Company

## PRESCRIBED DECLARATIONS **FOR LIF**

(Québec)

nis form contains the information and declarations that the trustee is required to collect to	authorized withdrawars and transfers of amounts from the LIF.		
Client's first and last name	LIF Account No.		
TEMPORARY INCOME			
As at December 31 of the previous year, the Annuitant was:  at least 54 years of age but less than 65 years of age  Complete Schedule 0.4 (basic rule)  Complete Schedule 0.8 (exceptions)	<del>-</del>		
The request to draw a temporary income is only valid for the calendar year	in which the request is signed and filed.		
Payment frequency:	innually		
Date of first payment: Amount of payment: \$	Net Gross Maximum temporary income		
YYYY MM DD  Your temporary income payment can only be deposited on or after the 5th day	of the month.		
☐ WITHDRAWAL OF ENTIRE BALANCE	☐ TRANSFER OF FUNDS TO THE LIF		
As at December 31 of the previous year, the Annuitant was at least	As at December 31 of the previous year, the Annuitant was:		
65 years of age.  ■ Complete Schedule 0.2  Date of payment:	☐ at least 54 years of age ☐ less than 54 years of age ☐ Complete Schedule 0.9.1		
VITHDRAWAL OF ENTIRE BALANCE	TEMPORARY INCOME (purchaser aged at least 54 but under 65 at the end of		
member or purchaser aged 65 or over at the end of the previous year)    SCHEDULE 0.2	the previous year)  SCHEDULE 0.4  (ss. 19.1 and 20.4) DECLARATION OF THE PURCHASER I declare:  1. that I was at least 54 years of age but less than 65 years of age at the end of last year;  2. that the total amount of the temporary pensions and variable benefits that I will receive during the current year under the following plans or contracts:  a) supplemental pension plans subject to or established by an act of the Parliament of Québec or any other legislative authority;  b) annuity purchase contracts of which the capital comes directly or not from such plans, is \$;  3. that the overall total maximum temporary income that I have determined for my life income funds, excluding the one for which I am making this declaration, is \$;  4. that the overall total maximum temporary variable payments that I have determined for the locked-in accounts of my voluntary retirement savings plans governed by the Voluntary Retirement Savings Plans Act (chapter R-17.0.1), excluding the one for which I am making this declaration, is \$  Date (YYYY MM DD)  Signature  NOTE: Whosoever makes a false declaration with the intention of obtaining a temporary		
ayment payable under a retirement savings instrument mentioned in the declaration is ubject to the penalties provided for in sections 257 and 262 of the Supplemental Pension Plans Act (chapter R-15.1).	income payable under a pension plan or contract mentioned in the declaration is subject to the penalties provided for in sections 257 and 262 of the <i>Supplemental Pension Plans Act</i> (chapter R-15.1).		
EMPORARY INCOME purchaser under age 54 at the end of the previous year)	TEMPORARY INCOME (purchaser aged at least 54 but under 65 at the end of the previous year)		
SCHEDULE 0.5  (s. 19.2) DECLARATION OF THE PURCHASER I declare:  1. that the income whose payment I shall receive during the next 12 months, other than the temporary income of which I am applying for payment from the life income fund with respect to which I am making this declaration, is \$;	□ SCHEDULE 0.8  (s. 20.4) DECLARATION OF THE PURCHASER I declare:  1. that I am not a party to any contract establishing a locked-in retirement account or a registered retirement pension plan of which the balance must be converted into a life annuity (locked-in RRSP);  2. that the amount that I have determined or intend to determine as the maximum		
<ol> <li>that I am not a party to any other contract establishing a life income fund;</li> <li>that a total of \$</li></ol>	temporary income for the current fiscal year is, for each of my life income funds, the supplemental pension plans of which I am a member and that offer the variable benefits referred to in Division II.3 of the Regulation respecting supplemental pension plans (chapter R-15.1, r. 6) and the locked-in accounts of my voluntary retirement savings plans governed by the Voluntary Retirement Savings Plans Action (chapter R-17.0.1) and offering temporary variable payments, at least equal to the reference temporary income calculated for this fund.		
4. that a total of \$			
The form of a temporary income.	X		
Date (YYYY MM DD) Signature	Date (YYYY MM DD) Signature		
NOTE: Whosoever makes a false declaration with the intention of obtaining a temporary income payable from the life income fund mentioned in the declaration is subject to the penalties provided for in sections 257 and 262 of the Supplemental Pension Plans Act chapter R-15.1).  COMMITMENT OF PURCHASER  hereby undertake to request a suspension of payments as soon as my income, excluding the income provided for in this section, reaches 40% of the Maximum Pensionable Earnings determined, for the year in which the payment is made, pursuant to the Act respecting the Québec Pension Plan.	<b>NOTE</b> : Whosoever makes a false declaration with the intention of obtaining a temporary income payable from the life income fund mentioned in the declaration is subject to the penalties provided for in sections 257 and 262 of the <i>Supplemental Pension Plans Act</i> (chapter R-15.1).		
X			
Date (YYYY MM DD) Signature			
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TRANSFER OF FUNDS 1		TRANSFER OF FUNDS TO THE LIF		
(purchaser aged 54 or o	ver at the end of the previous year)	(purchaser under age 54 a	t the end of the previous year)	
(s. 22.2) DECLARATION OF THE PURCHASER WHEN TRANSFERRING SUMS TO A LIFE INCOME FUND (purchaser aged 54 years or over at the end of the year preceding the year of transfer)  I declare that there is in the total of \$ transferred to the life income fund that is the object of this declaration a sum of \$ which does not come directly or indirectly from a life income fund established by a contract, from a supplemental pension plan that offers the variable benefits referred to in Division II.3 of the Regulation respecting supplemental pension plans (chapter R-15.1, r. 6), or from the locked-in account of a voluntary retirement savings plan governed by the Voluntary Retirement Savings Plans Act (chapter R-17.0.1) and offering variable payments to which I have been a party during the current year.		SCHEDULE 0.9.1  (s. 22.2)  DECLARATION OF THE PURCHASER WHEN TRANSFERRING SUMS TO A LIFE INCOME FUND (purchaser aged under 54 years at the end of the year preceding the year of the transfer)  I declare:		
		1. that since the beginning of the current year, I have not received any temporary income from a life income fund other than the one concerned by this declaration;  2. that, of the total of \$		
	X		X	
Date (YYYY MM DD)	Signature	Date (YYYY MM DD)	Signature	
<b>NOTE</b> : Whosoever makes a false declaration with the intention of obtaining an income payable from the life income fund mentioned in the declaration is subject to the penalties provided for in sections 257 and 262 of the <i>Supplemental Pension Plans Act</i> (chapter R-15.1).		payable from the life income f	false declaration with the intention of obtaining an income fund mentioned in the declaration is subject to the penalties and 262 of the Supplemental Pension Plans Act (chapter	