

Member Interfund Transfer Request

Member Information (please print)		
Name of employer/plan sponsor		Policy/plan number
Member name (Last / First / Middle)	Member key	Effective date (mm / dd / yyyy)

Details of the Interfund Transfer (please print)			
Transfer From – please indicate the fund(s) and amounts/percentages from which money is to be transferred:			
Fund	Amount	or	Percentage
	\$		%
	\$		%
	\$		%
Total	\$		100%
Transfer To – please indicate the fund(s) and amounts/percentages to which money is to be transferred:			
Fund	Amount	or	Percentage
	\$		%
	\$		%
	\$		%
Total	\$		100%
Contribution Source (see below): _____ Contribution Type (see below): _____			
Notes: <ul style="list-style-type: none"> • Market-based funds do not contain any rate or principle guarantees. • Minimum amount may apply to partial transfers. • Funds transferred from the Retirement Security Fund may be subject to market value adjustment. • For BGI funds, there is a minimum deposit of \$25 per fund. 			

Agreement and Signature	
I understand that the information furnished on this form will be used by CUMIS to administer the retirement plan in which I participate, and for such lawful purposes in accordance with federal and provincial laws, as may apply.	
Member signature	Date of signing (mm / dd / yyyy)

Codes	
Contribution Source:	mem Member Contribution com Company Contribution both Both Member and Company
Contribution Type:	01 Regular/Required Contribution 05 Voluntary 06 Transfer (locked-in) 07 Transfer (non-locked-in) 99 All the above