FSRA
Financial Services Regulatory Authority of Ontario

Ontario

Pooled Registered Pension Plan (PRPP) Application to Transfer the Family Law Value Ontario PRPP Form ON-D

Approved pursuant to the *Pooled Registered Pension Plans Act*, 2015, S.O. 2015, c.9

IMPORTANT

- This Transfer Form must be completed by the spouse of a PRPP member in order to transfer the spouse's share from the member's PRPP account. The member does not have to complete any Part of this form.
- Send your completed Transfer Form to the PRPP Administrator. **Do not send this form to the Financial Services Regulatory Authority of Ontario (FSRA) or the Office of the Superintendent of Financial Institutions.**
- Read FSRA's PRPP User Guide before completing this Transfer Form.
- You may want to get financial advice before completing this Transfer Form.

Part A - PRPP Information

Name of Pooled Registered Pension Plan	Registration Number

Name of Employer

PRPP Administrator

Mailing Address of PRPP Administrator (Street Number and Name)	Suite/Floor No.

City	Province	Postal Code

Part B - Information about the Member's Spouse

Last Name	First Name and Initials	Date of Birth (yyyy/mm/dd)

Social Insurance Number

Mailing Address (Street Number and Name)	Apt./Unit No.

City	Province	Postal Code

Telephone Number (Main)	Telephone Number (Other)	Fax Number

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Part C - Information about the Member

Last Name	First Name and Initials	Date of Birth (yyyy/mm/dd)

Member's PRPP Identification Number

Part D - Transfer Information

A court order, family arbitration award or domestic contract **cannot entitle** a member's spouse to an amount that **exceeds 50% of the Family Law Value**. The PRPP Administrator may not transfer to the spouse more than the maximum share permitted by law.

If your share of the Family Law Value is expressed as a proportion (i.e. percentage) of the Family Law Value in your settlement instrument (court order, family arbitration award or domestic contract), interest will be added to your lump sum payment from the Family Law Valuation Date to the beginning of the month in which the transfer is made.

If your share of the Family Law Value is expressed as a specified (i.e. dollar) amount in your settlement instrument (court order, family arbitration award or domestic contract), interest from the Family Law Valuation Date to the beginning of the month in which the transfer is made will only be added to your lump sum payment if your settlement instrument explicitly requires that it be credited.

Authority for the transfer of my share of Family Law Value is set out in:

◯ a court order

◯ a family arbitration award

◯ a domestic contract (e.g. separation agreement)

IMPORTANT

The amount you are reporting below must be the same as the amount reported in your court order, family arbitration award or domestic contract.

In the above document (i.e. court order, family arbitration award or domestic contract), my share of the Family Law Value to be transferred as a lump sum is expressed,

◯ as the following specified amount (interest to be added on this amount as set out in my settlement instrument) $ _____

OR

◯ as the following specified amount (no interest) $ _____

OR

◯ as the following percentage of the Family Law Value _____ %

The above document specifies my share of the Family Law Value on page: _____

The above document specifies the Family Law Valuation Date on page: _____

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Part E - Selected Transfer Option

See **Part E** of the **Statement of Family Law Value (Ontario PRPP Form ON-C)** for the options that are available to you. More information about each of the following options is provided in **Appendix 2** of the **Statement of Family Law Value**.

I choose to transfer my share of the Family Law Value to:

◯ A locked-in registered retirement savings plan. Complete **Part F** of this Transfer Form.

◯ A federal life income fund. Complete **Part F** of this Transfer Form.

◯ A restricted life income fund (RLIF). Complete Part F of this Transfer Form. [Note: In and after the calendar year the fundholder turns 55 years of age, up to 50 per cent of the money that is transferred into the RLIF may be withdrawn within 60 days of transferring the money to the RLIF using FSRA's Ontario **PRPP Form ON-2 (Certification(s) Regarding Spouse – Withdrawal/Transfer from a Locked-in Account).**]

◯ Purchase an immediate life annuity. Complete **Part F** of this Transfer Form.

◯ Purchase a deferred life annuity. Complete **Part F** of this Transfer Form.

◯ A PRPP. Complete **Part G** of this Transfer Form. (Note: This option will only be available if the administrator of the receiving PRPP agrees to accept the transfer.)

◯ A registered pension plan. Complete **Part G** of this Transfer Form. (Note: This option will only be available if the administrator of the receiving pension plan agrees to accept the transfer.)

Part F - Transfer to a Financial Institution

Name of Financial Institution (Bank, Insurance Company, etc.)

Mailing Address (Street Number and Name)			Suite/Floor No.
City	Province		Postal Code
Telephone Number	Fax Number	Policy Number or Account Number	

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Part G - Transfer to a PRPP or Another Registered Pension Plan

Name of Employer

Name of Administrator of Receiving PRPP or Registered Pension Plan

Name of Receiving PRPP or Registered Pension Plan	Registration Number

Province/Jurisdiction of Registration of PRPP or Registered Pension Plan (if applicable)

Mailing Address (Street Number and Name) of Administrator of Receiving PRPP or Registered Pension Plan		Suite/Floor No.
City	Province	Postal Code
Telephone Number	Fax Number	

Part H - Required Documents

The following documents MUST be included with this Transfer Form:

☐ Proof of your date of birth (e.g. certified copy of a birth certificate, baptismal certificate, passport)

One of the following documents MUST be included with this Transfer Form:

◯ Certified copy of a court order made under Part I (Family Property) of the Ontario Family Law Act (FLA) that provides for the transfer of my share of the Family Law Value. I certify that this is the final document: to the best of my knowledge, it is not subject to appeal or review by a court.

◯ Certified copy of a family arbitration award as defined in Part IV of the FLA that provides for the transfer of my share of the Family Law Value. I certify that this is the final document: to the best of my knowledge, it is not subject to appeal or review by a court.

◯ Certified copy of a domestic contract as defined in Part IV of the FLA that provides for the transfer of my share of the Family Law Value.

Other documents that may be required:

☐ Document(s) specified by the PRPP Administrator under “Next Steps” of the **Statement of Family Law Value (Ontario PRPP Form ON-C):**

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Part I - Confirmation and Direction

I confirm that to the best of my knowledge, the information that I have provided in this Transfer Form is correct and I direct the PRPP Administrator to make the transfer I have selected in **Part E** of this form. I also confirm that the transfer option I have selected in **Part E** of this Transfer Form is my final decision. I understand that once the PRPP Administrator transfers my share of the Family Law Value in accordance with my selected option, I cannot change my mind and select another option.

Name of Member's Spouse (printed)	Signature of Member's Spouse	Date (yyyy-mm-dd)

Print Form Clear Form Save Form

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