



# CERTIFICATION OF LOCK-IN FOR PURPOSES OF THE CANADIAN FORCES SUPERANNUATION ACT OR THE PENSION BENEFITS DIVISION ACT

## Privacy Notice

Provision of the personal information including the social insurance number (SIN) is required pursuant to the *Department of Public Works and Government Services Act*, para. 7(1)(d) and s.13 and will be used for the purpose of administrating pension payments, CRA/RQ reporting and administrating the *Canadian Forces Superannuation Act* (CFSA). Refusal to provide the personal information, or the provision of incorrect information may result in loss of benefits and/or delays in processing incorrect pension estimates, benefits, or statements. Personal information is protected, and only used and disclosed in accordance with the *Privacy Act* and as described in Personal Information Bank PWGSC PCU 702 - Federal Pension Administration. Under the Act, individuals have a right of access to their personal information and request correction, if erroneous or incomplete.

**This form must be completed electronically. If not possible, please complete it in dark ink using capital letters.**

### Plan Member's Personal Information

Rank

Surname

Given Names

Pension Number

Date of Birth (YYYYMMDD)

Preferred Language

 English  French

Service Number

Home Address

Apartment Number

Preferred Telephone Number

City

Province

Postal Code

Country

Email address (optional)

Form Number

Case Number

**FOR OFFICE USE ONLY** ▶

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Form Number	Service Number	Pension Number

**Carefully read instructions on the following page before completing.**

Name of Payee

Social Insurance Number

Account Number (See instruction number 2)

We certify that the above-named individual's account to which the funds payable pursuant to the CFSA or the PBDA are to be credited meets one of the following requirements:

- the funds will be administered in accordance with the lock-in provisions of the federal *Pension Benefits Standards Act, 1985*;

or

- the funds will be used for the purchase of an immediate or deferred life annuity, as defined in the federal *Pension Benefits Standards Act, 1985* for the above-named individual.

Name and Address of Company or Financial Institution

Company or Financial Institution Stamp, Seal or Address Stamp

Signature of Official

Position Title

Name

Date (yyyymmdd)

Telephone Number

Fax Number

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**INSTRUCTIONS**

- 1.** Pursuant to the provisions of the *Privacy Act*, information regarding the payee's pension account will not be given to the company or financial institution unless the payee provides the Government of Canada Pension Centre with a written authorization to release that information.
- 2.** The "Account Number.", under which the funds will be locked-in, must correspond to the account number quoted on the Canada Revenue Agency (CRA) form used for the direct transfer of funds (T2151E). Should the number on the CRA form differ, the payee should amend the form accordingly.
- 3.** Questions concerning the lock-in provision under the federal *Pension Benefits Standards Act, 1985* (PBSA, 1985) must be addressed to the company or institution's regional office or head office. Should that office be unable to reply to the inquiry, information about the PBSA can be obtained from the Office of the Chief Actuary (OCA).
- 4.** If the address where the funds must be transferred differs from the address on this form, please indicate the correct address for payment on a separate sheet.
- 5.** If the company or financial institution has no stamp, seal or address stamp, a letter with the company or institution's letterhead must accompany this form.
- 6.** The original copy of this form must be forwarded to the Government of Canada Pension Centre by the payee, the company or the financial institution.

**Public Works and Government Services Canada  
Government of Canada Pension Centre - Mail Facility  
150 Dion Boulevard  
PO Box 9500  
Matane QC G4W 0H3**