



# Sun Life Guaranteed Investment Funds (GIFs)

## TRANSFER CHECKLIST

### Completing transfers into registered contracts:

**STEP 1:** When meeting with a client, complete and submit the forms and documentation that apply:

- ☐ 4622 – Transfer authorization for registered investments (if applicable)
  - ☐ Signed application (if a new Sun Life GIFs contract)
  - ☐ Additional forms for locked-in contracts
    - ☐ Relinquishing institution locking-in agreement with jurisdictional information (locking-in agreement must be signed by receiving institution, not the advisor, before money can be released)
- Note: Your distributor will forward the locking-in agreement to the Sun Life GIFs team for the form to be signed and sent to the relinquishing institution
- ☐ **Government Forms**
    - ☐ T2033 – For RRSP to RRSP or RRIF to RRIF transfers
    - ☐ T2151 – For pension transfers: LIRA to LIF, LIF to LIF
    - ☐ T2030 – For LIF to RRIF, LIF to LIRA or RRIF to RRSP
    - ☐ T2220 – Marriage breakdown
    - ☐ Any other applicable unlocking or pension transfer documentation

### Completing transfers into non-registered contracts:

**STEP 1:** When meeting with a client, complete and submit the forms and documentation that apply:

- ☐ 4621 – Transfer authorization for non-registered investments
- ☐ Signed application (if a new Sun Life GIFs contract)

### Contact information

Toll Free English: 1-844-753-4437 (1-844-SLF-GIFS)  
 Toll Free French: 1-844-374-1375 (1-844-FPG-IFSL)  
 Fax: 1-855-247-6372

Sun Life Assurance Company of Canada  
 30 Adelaide Street East, Suite 1  
 Toronto, ON M5C 3G9 Canada

**Life's brighter under the sun**

Sun Life GIFs are individual variable annuity contracts issued by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.  
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### The following steps apply to transfers into registered and non-registered contracts:

**STEP 2:** For both registered and non-registered contracts the following forms must be given to the client:

- ☐ Copy of all forms
- ☐ Applicable Fund Facts document(s)
- ☐ Applicable Information folder and contract and supplement(s)

### STEP 3: Submit transfer forms

- ☐ Original copies of the transfer form sent to the relinquishing institution
- ☐ Copies of the documents sent to distributor
  - ☒ If contract/account is locked-in and the relinquishing institution requires a Sun Life authorized locking-in agreement, please contact our call centre

### STEP 4: Transfer follow ups

- ☐ Copies of transfer forms should be sent to Sun Life Assurance Company of Canada by:
    - ☒ Fax: 1-855-247-6372
    - ☒ Mail: 30 Adelaide St E, Suite 1, Toronto, ON M5C 3G9
- Sending copies to Sun Life will ensure we can follow up with the relinquishing institution.
- Note: Pension administrators may request original client signature on applicable unlocking or pension transfer forms



## DON'T FORGET

- ✓ Forms are subject to change.  
**To access up-to-date forms visit [www.sunlifegifs.com](http://www.sunlifegifs.com)**
- ✓ Locked-in transfers can take up to 8 weeks on average for completion
- ✓ Registered transfers can take up to 4 weeks on average for completion
- ✓ Ensure forms(s) are completed in full including:
  - ☒ Investment instructions
  - ☒ Relinquishing and receiving account/contract number(s)
  - ☒ Type of transfer (i.e. 'in cash' or 'in kind')
  - ☒ Transfer amount (full transfers select "all"; otherwise provide the specific dollar amount)
  - ☒ Applicable signatures
  - ☒ Date

