

**TD2R - DIRECT TRANSFER OF AN ELIGIBLE RETIRING ALLOWANCE**

This TD2R form replaces the TD2 form previously required by Canada Customs and Revenue Agency (CCRA) for the transfer of a retiring allowance to a Registered Retirement Savings Plan or Registered Pension Plan (RRSP/RPP). A retiring allowance is an amount received on or after retirement in recognition of long service, payment for unused sick leave, and amounts received for loss of office or employment.

**An individual can transfer all or part of a retiring allowance payment to an RRSP/RPP:**

**Eligible Amount:** The amount that is eligible for transfer is limited to:

- \$2,000 for each year or part of a year before 1996 that the person worked for the employer; plus
- \$1,500 for each year or part of a year before 1989 of that employment in which none of the employer's contributions to the Registered Pension Plan had vested in the employee's name when the employer pays the retiring allowance, i.e. non-pensionable service. (This is time that you worked for the employer but did not contribute to the Public Service Pension Plan and do not intend to purchase as pensionable service).

**The Non-Eligible amount** may be transferred to an RRSP/RPP provided that it is within the limit of the employee's RRSP deduction limit (current year's RRSP room).

**NOTE: IT IS THE RESPONSIBILITY OF THE EMPLOYEE TO ENSURE THE AMOUNT INDICATED FOR TRANSFER TO AN RRSP IS WITHIN THE DEDUCTION LIMIT ESTABLISHED BY CCRA. SHOULD THIS TRANSFER RESULT IN AN OVER-CONTRIBUTION, THE EMPLOYEE IS RESPONSIBLE FOR ANY PENALTIES THAT MAY BE LEVIED BY CCRA. EMPLOYEE SIGNATURE AT THE BOTTOM OF THIS FORM INDICATES ACCEPTANCE OF THIS RESPONSIBILITY.**

Last Name	Usual First Name and Initials	Social Insurance Number
Address		Postal Code

**Source of Retiring Allowance transfer:** (one source per transfer form):  50 % Sick Bank  
 ERIP or Severance  
 Retirement Allowance (article 27.18)

**Amount of funds to be transferred:** \$ \_\_\_\_\_  
Eligible amount (of above transferred amount): \$ \_\_\_\_\_  
Non-eligible amount (of above transferred amount): \$ \_\_\_\_\_ (see "The Non-Eligible amount" & **NOTE**)

**Cheque Payable to:**

Institution Name: \_\_\_\_\_  
Attention (optional): \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Postal Code: \_\_\_\_\_

**Account Number** (or contract number): \_\_\_\_\_

**Please ensure** this form is fully completed with correct information or there may be a delay in your payment(s) being transferred. Sufficient information must be provided for the institution to identify your payment. Since many institutions have central processing units for these payments, the payment may not go directly to your broker/agent.

**Your Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_