



PRE-RETIREMENT FUND ELECTION FORM

Members must be within 5 years of their earliest possible retirement date to participate in the Pre-Retirement Fund.

Mail this completed form to: The Capital Pension Plan, 1170-1801 Hamilton St., Regina, SK S4P 4B4, or fax it to (306) 787-5798.

SECTION A: MEMBER INFORMATION

(Complete Section A in all cases.)

Member ID/SIN	Surname	First Name and Initial		Date of Birth	
Street Address		City or Town	Province	Postal Code	Phone Number

SECTION B: ELECTION TO TRANSFER EQUITY

(Complete Section B to transfer equity.)

Eligible members may transfer all or a portion of their equity between the Diversified Fund and the Pre-Retirement Fund **free of charge** once per quarter as follows:

- One free transfer from January 1st to March 31st;
- One free transfer from April 1st to June 30th;
- One free transfer from July 1st to September 30th; and
- One free transfer from October 1st to December 31st.

Each additional transfer within the same quarter will be subject to a fee of \$75.00 per transfer, which will be deducted from your account at the time the transfer is processed.

NOTE: Forms received by 5:00 pm CST each Friday will be processed based on the next declared unit values. Unit values are declared weekly and at December 31st and are based on values at market close on the last business day for the period.

Transfer from Diversified Fund to Pre-Retirement Fund

- I elect to transfer **all** my current equity from the Diversified Fund to the Pre-Retirement Fund; or
- I elect to transfer _____% of my current equity from the Diversified Fund to the Pre-Retirement Fund; or
- I elect to transfer \$ _____ of my current equity from the Diversified Fund to the Pre-Retirement Fund.

Transfer from Pre-Retirement Fund to Diversified Fund

- I elect to transfer **all** my current equity from the Pre-Retirement Fund to the Diversified Fund; or
- I elect to transfer _____% of my current equity from the Pre-Retirement Fund to the Diversified Fund; or
- I elect to transfer \$ _____ of my current equity from the Pre-Retirement Fund to the Diversified Fund.

SECTION C: DIRECTING FUTURE CONTRIBUTIONS

(Complete Section C to direct future regular contributions.)

NOTE: Unless otherwise directed, future regular contributions will be directed to the Fund previously indicated.

- I direct all future regular contributions are to be deposited to the Pre-Retirement Fund; or
- I direct all future regular contributions are to be deposited to the Diversified Fund

Member's Signature _____

Date _____