



# CAPITAL PENSION PLAN LUMP SUM WITHDRAWAL OF VOLUNTARY FUNDS

**Privacy Policy:** Information collected by the Capital Pension Plan shall only be used and disclosed for the provision of benefits available from the Plan and compliance with applicable legislation. By completing this form you are providing your consent to use this information for the above stated purposes.

## Member Information

(to be completed in all cases)

Member ID/SIN	Surname	First Name and Initial	Date of Birth
			<small>Day   Month   Year</small>
Mailing Address			Telephone Number

## Request for Lump Sum Withdrawal

- I wish to withdraw 100% of available voluntary funds; or
- I wish to withdraw \$ \_\_\_\_\_, before taxes\* from voluntary funds

If you are invested in **both** the Diversified Fund and the Pre-Retirement Fund, you may choose to deduct your withdrawal:

- proportionately from both Funds (default option if no selection is made); or
- from the Diversified Fund exclusively; or
- from the Pre-Retirement Fund exclusively

\*Taxes will be withheld from lump sum withdrawals based on the rates below. Your total tax liability will be determined when you prepare your tax return and will be based on your income from all sources and may be higher than the amounts withheld.

\$0 to \$5,000	10%
\$5,001 to \$15,000	20%
\$15,001 and over	30%

**Please Note:** You can make **one free** lump sum withdrawal of voluntary funds from January 1<sup>st</sup> to June 30<sup>th</sup> and **one free** lump sum withdrawal of voluntary funds from July 1<sup>st</sup> to December 31<sup>st</sup>. A fee of \$75.00 will be charged for each additional lump sum withdrawal requested during the same 6 month period.

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 on December 31<sup>st</sup> and are based on values at market close on the last business day for the period.

## Member Authorization

(to be completed in all cases)

X \_\_\_\_\_ Date: \_\_\_\_\_  
 Member Signature Day Month Year

**REQUEST FOR LUMP SUM WITHDRAWAL OF VOLUNTARY CONTRIBUTIONS**

**VOLUNTARY  
LUMP SUM**

January 2012

Submit the completed form by mail or fax to: **Capital Pension Plan  
 1170 – 1801 Hamilton Street  
 Regina, SK S4P 4B4  
 FAX: (306) 787-5798**