



INSTRUCTIONS

- 1. This form must be completed by the financial institution applying for inclusion on the Superintendent's List of Acknowledged Financial Institutions, and signed by the authorized signing officer. One form may be used to apply for both types of locked-in products (LIRA and LIF)
2. Applying Financial Institution must be registered with BCFSA or Office of the Superintendent of Financial Institution (OSFI)
3. Attach the sample LIRA or LIF contract between the account holder and financial institution
4. Upon completion, please forward this form and all attachments to: Pensions@bcfsa.ca. If you have any questions, please call 604-660-3555.

Freedom of Information and Protection of Privacy Act (FOIPPA)

The information requested on this form is collected under the authority of section 26(c) of the Freedom of Information and Protection of Privacy Act. The information is collected for the purpose of administering section 95 of the Pensions Benefits Standards Regulation. If you have any questions about the collection or use of this information, please contact the Privacy Officer at 604-660-3555, 600-750 West Pender Street, Vancouver, B.C., V6C 2T8.

PART A – APPLICATION

I hereby apply to have the following financial institution, on its behalf and on the basis of this application (including the certification below), acknowledged under section 95 of the Pension Benefits Standards Regulation and placed on the Superintendent's list of LIRA and LIF issuers to administer one or both of the following products, as applicable:

[ ] LIRA

[ ] LIF

Note: Agents acting on behalf of a Financial Institution are not required to apply or be on the list

PART B – FINANCIAL INSTITUTION INFORMATION

Contact Name and Position

Financial Institution Name

Type of Financial Institution

Address

City

Province/State

Postal/Zip Code

Phone Number

Email Adress

PART C – CERTIFICATION

I hereby certify that:

- a) an addendum set out in Schedule 1 or 2 (as applicable) of the Pension Benefits Standards Regulation will form a part of every LIRA/LIF issued by the financial institution in respect of funds originating in a pension plan subject to British Columbia's Pension Benefits Standards Act for service rendered in British Columbia, regardless of when it was issued, and a copy of the addendum will be given to each LIRA/LIF owner,
b) each addendum will be amended as and when Schedule 1 or 2 (as applicable) is legislatively amended and a copy of the amended addendum or the amendments will be provided to the affected LIRA/LIF owners, and

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c) the money held in the LIRA/LIF will be administered in accordance with British Columbia legislation.

Signature:

Date Signed:  
(mm/dd/yyyy)

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## CHECK LIST

- Completed Form
- Sample LIRA or LIF Contract between the account holder and financial institution (please do not include the addendum; schedule 1 or 2)