

Form 10

Application for Temporary Income from a Life Income Fund (LIF)

► Why complete this form?

Use this form if you want to receive temporary income from a life income fund (LIF).

Answer the following questions to see if this is the right form for you.

Did you earn the pension benefit that was transferred to the LIF while working in Nova Scotia?

Yes. Continue to the next question.

No. Do not use this form; contact the jurisdiction where the pension benefit was earned.

Was the pension benefit that was transferred to the LIF earned while working for a company regulated by the federal government?

Yes. Do not use this form; contact the financial institution that holds your LIF.

No. Continue to the next question.

What is your age?

55-64. Complete this form.

54 on December 31 last year. Complete this form after you turn 55.

65, but 64 on December 31 last year. Complete this form.

None of the above options. Do not use this form.

1 ► Give information about the LIF

LIF account number: _____

Name of the financial institution looking after the LIF: _____

Address: _____ City or Town: _____

Postal code: _____ Phone number: _____

2 ► Give your personal information

Last name: _____

First name: _____ Middle name: _____

Address: _____ City or Town: _____

Postal code: _____ Phone number: _____

Date of birth (yyyy/mm/dd): _____

3 ► How much temporary income do you want to receive?

\$ _____

the maximum allowed

4 ▶ Sign the certification

I **certify** that I am the owner of the LIF named in this form.

I **certify** that I will receive no more than \$ _____ in temporary income during the current calendar year from a pension plan, a life annuity arising from a pension plan, or both.

I **certify** that I will receive no more than \$ _____ in temporary income from any other LIF during the current calendar year except for the income I receive as a result of this application.

<p>Signature: _____ Date (yyyy/mm/dd): _____</p>
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5 ▶ Give this application to the financial institution that looks after your LIF.

Do not give this application to the Department of Finance and Treasury Board, Pension Regulation Division

It is an offence under the Criminal Code for anyone to knowingly make or use a false document with the intent that it be acted upon as genuine.

This form is approved by the Superintendent of Pensions under the Pension Benefits Act.

Questions? Email: pensionreg@novascotia.ca

How we define financial institution

Financial institution – a bank, credit union, insurance company, or other organization that invests money in financial assets