



# Stewards Canada Retirement Savings Plan - APPLICATION

Contract Number

## Annuitant

Name (Last name, first name)

SIN

Address

  
  
 Postal Code 

Birthdate

  
MM DD YYYY

Telephone (Residence)

Mailing Address (if different from home address)

  
  
 Postal Code 

Telephone (Business)

Fax Number

Are you a resident of Canada?  Yes  No

## Spousal Contributor

Complete only if this deposit is being made by and claimed as a deduction by your spouse  Yes  No

Name (Last name, first name)

SIN

Birthdate

  
MM DD YYYY

## Please Review Carefully and Sign Below

To: Concentra Trust – Trustee

- I hereby apply for participation in the **Stewards Canada** Retirement Savings Plan (Plan) in accordance with the Declaration of Trust supplied to me.
- I request that the Trustee apply for registration of my Plan as a registered retirement savings plan with the proper authorities pursuant to the provisions of the *Income Tax Act* (Canada).
- I request that this contribution, and any subsequent contributions, be deposited in **Stewards Canada** by the Trustee and I acknowledge that the terms and conditions of such deposits have been and will be agreed upon between myself and **Stewards Canada** and such deposits will be held by the Trustee.
- I hereby acknowledge that:
  - I am solely responsible for determining the amount of contribution to the Plan which I may claim as a deduction under applicable tax legislation.
  - Any payments received by me under the Plan must be included in my income for the taxation year of receipt and will be subject to tax under the applicable tax legislation.
  - I will exercise due care, diligence and skill of a reasonably prudent person to minimize the possibility that the Plan holds a non-qualified investment.
- I understand and acknowledge that the personal information contained herein is being collected by Concentra Trust (the "Trustee") and that by signing below, I confirm that I have read and consent to the terms of the "Concentra" Privacy Policy located on the Concentra website at [concentra.ca](http://concentra.ca) or by contacting the Trustee at 1-800-788-6311. "Concentra" refers to Concentra Bank and its wholly-owned subsidiary Concentra Trust. I confirm that the information provided herein is true and accurate and I agree to make the Agent, on behalf of the Trustee, aware of any changes to the personal information contained on this application form.

Accepted by **Stewards Canada**  
Authorized Agent for the Trustee

Date

Annuitant's Signature

**Stewards Canada**  
PO Box 1  
Orono, ON L0B 1M0  
Telephone: 905-797-3003 Fax: 905-797-3131