

Registered Retirement Savings Plan (RRSP)

In order to open this account, you need to provide the following items and fill out the required forms.

Required Items

- Requested items for account holder identity verification. For more details see next page "Identity verification"

Required Forms

- [Account Opening Form](#)
- [Retirement Savings Plan Application Form](#)
- [Communication with Beneficial Owners of Securities \(54-101\)](#)
- [Direct Deposit](#)
- [Designation of Beneficiary \(for residents outside Quebec\)](#)

Optional Forms

- [Systematic Withdrawal](#)
- [Power of Attorney](#)
- [Information on third parties](#)
- [Transfer Authorization for Registered Investments \(attach a copy of your last statement\)](#)
- [Power of Attorney to Transfer Bonds or Shares \(upon delivery of physical certificate\)](#)
- [Home Buyers' Plan \(HBP\)/Request to Withdraw Funds from an RRSP \(T-1036\)](#)
- [Direct Transfer from a DPSP or an RPD \(T-2151\)](#)
- [W-9 \(mandatory when U.S. citizenship is held\)](#)

When a registered account is opened, a non-registered account is opened automatically as well. It is a Cash Account, but you may opt for a Margin Account, an Options Account or a Short Sell Account according to your needs. Click on Margin Account or Options Account in the section Application Forms to find out what is needed to open these account types.

Identity verification (only one option can be chosen)

Option 1

- I am attaching a copy of an acceptable **piece of identification** ** (attested by an employee of Laurentian Bank Securities or Laurentian Bank).
- I am attaching a check specimen***.

Option 2

I select the combination of two (2) of the three (3) following options:

- 1 - Personal check of \$15 made payable to LBDB
- 2 - Verification of credit file (done by LBDB)
- 3 - Attested photocopy* of an acceptable piece of identity**

Please select a combination:

- Combinaison: 1 and 2
 Combinaison: 1 and 3
 Combinaison: 2 and 3

- If options 1 and 2 are chosen: a photocopy of an unattested piece of identity** is required.
- If options 2 and 3 are chosen: a check specimen is required. ***

***Attestation of the original piece of identification must be made by a Commissioner of Oaths, an employee or guarantor. Acceptable guarantors are lawyers and notaries. The attestation must be produced on a readable photocopy of the document.**

****Acceptable pieces of identification:**

- **Valid (non-expired) driver's license**
- **Valid (non-expired) Medicare card**
 - Except for Ontario, Manitoba and Prince Edward Island.
 - In Quebec, this can only be used if you volunteer it when asked for identification.
- **Valid (non-expired) passport**

***** The name of the account holder and the account number must be pre-encoded on the check. A Laurentian Bank client profile with a bank account or a bank statement can replace the void check.**

Note: If you are a US citizen, and you reside permanently in the United States (+ 183 days), a W-9 form must be completed and attached to this form.