



HOW TO ENROL – I.A.T.S.E. Local 212

STEP 1

Read through the material in your ***Envision Your Retirement Enrolment Package*** to familiarize yourself with the Plan rules, the services provided by Great-West Life and your investment options.

STEP 2

Read and complete the ***Investment Personality Questionnaire***. This questionnaire will help you determine your investment personality and suggest a compatible asset mix.

STEP 3

- ◆ **Complete the *Application for Membership in the Non-Registered Retirement Savings Plan for Members*, the *Application for Membership in the Registered Retirement Savings Plan for Members*. ****
- ◆ **Complete Section 6** (Investment Allocation Instructions) on all applications as applicable. It is important that you refer to the results of your *Investment Personality Questionnaire*, the *Portfolio Funds Brochure* and other *Fund Detail Sheets* to make an informed selection.

Note: If no investment instructions are chosen your contributions will automatically be invested in the default fund.

STEP 4

Once ***all*** forms have been completed, dated and signed, please return the originals to your GRSP Administrator for processing and account activation:

Dee Picciano, GRSP Administrator
I.A.T.S.E. Local 212
201-208 57th Avenue, SW
Calgary, AB T2H 2K8

OPTIONAL: Use the “Transfer Authorization for registered investments” for any other RRSP plans you wish to transfer to your Great-West Life plan. Please ask your financial institution about their transfer fees before sending it to them. If you have an RRSP with an investment company and would like to identify any costs you may incur your Administrator has created a letter that you can complete and send to your financial institution before transferring your contributions. A template of this letter can be obtained at www.ceirp.ca in the “Forms” section or from your Administrator.

**For help completing your enrolment applications contact your GRSP Administrator at 403-250-2199 or drs@iatse212.com or instructions can be found online at www.ceirp.ca in the “Forms” section.