

Plan No./Contract No.: _____

NB: This form is only to be used for sums invested in a **Beneva investment account**.

1. Contractholder Information

Last name

First name

2. Identification of Plan – One Form Per Plan

☐ NRSP (Non-registered)☐ RRSP☐ Spousal RRSP☐ LIRA/LRSP☐ RRIF☐ Spousal RRIF☐ Prescribed LIF/RIF☐ TFSA☐ Restricted LIF☐ RLSP

3. Source of Funds

Redemption fees, such as deferred sales charges, may apply following the redemption of the sums invested with: _____ (the ceding company) and their transfer to the above annuity contract (the contract). The redemption fees charged by the ceding company are estimated at \$_____, and remittance of \$_____ is requested under this form.

To compensate for the redemption fees with the authorization of the advisor, Beneva will pay the contractholder an amount equivalent to:

- i) The actual redemption fees, or
- ii) The commission payable to the advisor, whichever is lower.

The commission payable to the advisor will be adjusted in accordance with the administrative rules currently in effect at Beneva. **A statement reflecting the transfer fees must be attached to this form.**

4. Remittance

The remittance amount will be invested based on the same investment instructions and fee options as those applicable to the amount transferred to Beneva.

In the case of a Registered Retirement Savings Plan, the remittance is not considered as a new RRSP contribution.

Signed at _____ on this _____ day of _____ 20_____.

X

Advisor's signature

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Advisor's code

You must submit your Redemption fee remittance request together with proof all related expenses incurred, by mail or email within 2 months following the date that you signed the request to inter-bank transfer. Our contact information:

Beneva Inc.

Savings & Investments

CP 10510 Station Sainte-Foy

Quebec QC G1V 0A3

Email: service.inv@beneva.ca

Protecting your personal information is a priority for Beneva. To find out more about our practices, please consult the *Personal Information Protection Statement* located at www.beneva.ca.