

Policy No.

Name(s) of the policyowner(s)

Section A – Transfer

- Please indicate the transfers to make below. For a **complete** transfer, write **100%** in the “% to transfer” column under the “Transfer from (current accounts)” section.
- When using percentages to indicate the new split, the total percentage must equal 100% (minimum 10% per account).
- If no split percentage is specified for two accounts or more, premiums and deposits will be equally divided between the accounts.
- Four transfer requests can be made per year free of charge. For subsequent requests, an amount of \$25 per transfer will be charged.
- The market value adjustment applies to all guaranteed interest account transfers.

Transfer from (current accounts)			Transfer to (new accounts)		
Interest accounts	\$ to transfer	% to transfer	Interest accounts	\$ to transfer	% to transfer
Daily interest account	\$	or %	Daily interest account	\$	or %
1-year guaranteed interest account	\$	or %	1-year guaranteed interest account	\$	or %
3-year guaranteed interest account	\$	or %	3-year guaranteed interest account	\$	or %
5-year guaranteed interest account	\$	or %	5-year guaranteed interest account	\$	or %
10-year guaranteed interest account	\$	or %	10-year guaranteed interest account	\$	or %
Indexed accounts			Indexed accounts		
Canadian Money Market (3-month Treasury Bill)	\$	or %	Canadian Money Market (3-month Treasury Bill)	\$	or %
Canadian Bonds (FTSE Canada Universe Bond)	\$	or %	Canadian Bonds (FTSE Canada Universe Bond)	\$	or %
Canadian Equity (S&P/TSX)	\$	or %	Canadian Equity (S&P/TSX)	\$	or %
US Equity (S&P 500)	\$	or %	US Equity (S&P 500)	\$	or %
US Equity, Technology (MSCI US IM Information Technology 25/50)	\$	or %	US Equity, Technology (MSCI US IM Information Technology 25/50)	\$	or %
Small Cap US Equity (S&P SmallCap 600)	\$	or %	Small Cap US Equity (S&P SmallCap 600)	\$	or %
International Equity (MSCI EAFE)	\$	or %	International Equity (MSCI EAFE)	\$	or %
Global Equity (MSCI World Ex Canada)	\$	or %	Global Equity (MSCI World Ex Canada)	\$	or %
Emerging Market Equity (MSCI Emerging Markets)	\$	or %	Emerging Market Equity (MSCI Emerging Markets)	\$	or %
Managed accounts			Managed accounts		
Conservative Strategy	\$	or %	Conservative Strategy	\$	or %
Balanced Strategy	\$	or %	Balanced Strategy	\$	or %
Growth Strategy	\$	or %	Growth Strategy	\$	or %
Aggressive Strategy	\$	or %	Aggressive Strategy	\$	or %
100% Equity Strategy	\$	or %	100% Equity Strategy	\$	or %
CI Canadian Asset Allocation	\$	or %	CI Canadian Asset Allocation	\$	or %
CI Global Income and Growth	\$	or %	CI Global Income and Growth	\$	or %
Guardian Conservative Monthly Income	\$	or %	Guardian Conservative Monthly Income	\$	or %
Guardian Monthly Income	\$	or %	Guardian Monthly Income	\$	or %
PIMCO Bond	\$	or %	PIMCO Bond	\$	or %
PIMCO Global Bond	\$	or %	PIMCO Global Bond	\$	or %
Triasima Canadian Equity	\$	or %	Triasima Canadian Equity	\$	or %
Guardian Canadian Dividend Equity	\$	or %	Guardian Canadian Dividend Equity	\$	or %
Hillsdale US Equity	\$	or %	Hillsdale US Equity	\$	or %
Fiera Capital Global Equity	\$	or %	Fiera Capital Global Equity	\$	or %
TD Global Dividend Equity	\$	or %	TD Global Dividend Equity	\$	or %
C WorldWide International Equity	\$	or %	C WorldWide International Equity	\$	or %
Lazard Global Infrastructure	\$	or %	Lazard Global Infrastructure	\$	or %
Fisher Emerging Markets Equity	\$	or %	Fisher Emerging Markets Equity	\$	or %
CI Global Real Estate	\$	or %	CI Global Real Estate	\$	or %
			TOTAL (if the new split is specified in %)	100%	

Section B – Premiums / future deposits / lump sum deposits

- ☐ Credit all premiums / future deposits to the **new accounts** listed in Section A.
- ☐ No change for premiums / future deposits.
- ☐ If different from accounts listed in Section A, credit premiums / future deposits to the accounts listed below:
- ☐ Lump sum deposit credited to the accounts listed below:

Name of account / investment option	Amount in %
Total	100%

Section C – Transitory deposit account

If you want to change the investment option for the transitory deposit account, the only available option is the daily interest account. Please check the box below if you wish to modify your investment option for the transitory deposit account to the daily interest account.

☐ I would like my transitory deposit account to be credited in accordance with the yield of the daily interest account.

Section D – Authorization and signatures

I (we) hereby authorize Beneva Inc. to make the changes requested above to my Universal life policy.

X

Signature of policyowner 1

X

Signature of policyowner 2

Y

Y

Y

Y

M

M

D

D

Date of signature

Protection of personal information

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 [Beneva.ca](#).