

Contract No.: _____

1. Contractholder's Identification

Last name

First name

2. Plan Details (Check one box only)

- ☐ NRSP (non registered)
- ☐ TFSA
- ☐ RRSP OR ☐ Spousal RRSP
- ☐ RRIF OR ☐ Spousal RRIF
- ☐ LIRA¹/LRSP¹ OR ☐ LIF¹
- ☐ Restricted LIF¹ OR ☐ RLSP¹
- ☐ PRRIF (Saskatchewan) OR ☐ LRIF¹ (Newfoundland and Labrador)

1. ☐ The amounts come from sums acquired from the pension plan of a former spouse following a separation or death. Attach a copy of the divorce or separation judgement or a copy of the death certificate.

3. Transfer Types

Attach the Identification of politically exposed persons and heads of international organizations form if the transfer made into a non-registered plan is for \$100,000 or more.

Please complete the Investment instructions section.**Transfer from another institution or an employer – Attach a copy of the form**

Type of form:

Amount:

\$

\$

\$

\$

Name of
financial institution
or employer:

4. Investment Instruction

See rates sheet to learn more about available products. Investment accounts are not available with non registered plans.

Daily Interest Account (R) ¹ (DIA)	Amount <input type="checkbox"/> \$ or <input type="checkbox"/> %

Beneva GIAs and Beneva Equity Index GIAs	400 \$ minimum per CIG	Investment maturity date (YYYY/MM/DD) or term	Compound Interest (C) or Simple Interest with annual payment ² (S)	Redeemable (R) ¹ or non-redeemable (NR)	For Equity Index GIAs ³ only	
	Amount <input type="checkbox"/> \$ or <input type="checkbox"/> %				Index	Guarantee at maturity (%)

Beneva Investment Accounts redeemable (R) ¹	Code	Amount <input type="checkbox"/> \$ or <input type="checkbox"/> % \$400 minimum

1. Redeemable investment subject to the applicable fees and penalties
2. Direct Deposit (attach a cheque specimen)
3. Compound interest (C) only for Equity Index GIAs

5. Important Notice

Amounts invested in Beneva investment accounts are not guaranteed, except in the event of the death of the contractholder, except a minimum given percentage of contributions in the event of the death of the contractholder or at the maturity of the guarantee (refer to the Savings Annuity Contract for more information). Any investment in these accounts is made with Beneva (the Insurer) and does not confer any entitlement to the reference fund securities. Amounts invested in these accounts are invested in the Insurer's general funds. The Insurer subdivides the amounts invested into units. These units, which are not securities, are issued solely for the purpose of making it easier to track future fluctuations in the value of your investment. The Insurer establishes the initial value of the units granted to you at the time of your investment. Any returns generated by these accounts are tied to the performance of a market index or reference fund, less any applicable management fees. Market index or reference fund performance fluctuates depending on the market value of the securities that make up the fund. Depending on the market index or reference fund performance, the account balances may, therefore, increase or decrease on a daily basis and may even fall below the amounts invested, if the rate of return, after deduction of management fees, is negative. If the market index or reference fund becomes unavailable or the Insurer ceases to use it as a market index or reference fund, for any reason whatsoever, the latter reserves the right to replace it with another market index or reference fund it deems similar or to determine the applicable rate of return.

Transfer fees: This investment may be redeemed or transferred at any time, subject to transfer fees.

6. Contractholder's Declaration

- I have verified the information contained in this application and certify it to be true and complete.
- I acknowledge that I have read and understood the Important Notice section.
- I agree to pay any fees and penalties applicable to this transfer, if applicable.
- I certify that my signature, if affixed electronically, has the same legal value as my handwritten signature. Any reproduction of this form whose integrity is ensured has the same legal value as the original.

X
Signature of contractholder

Y Y Y Y M M D D
Date

X
Signature of co-contractholder (where applicable)

Y Y Y Y M M D D
Date

7. Advisor's Declaration

- I declare that I obtained prior specific authorization from the contractholder for this instruction form and that I informed the contractholder of any applicable fees and penalties.
- I certify that my signature, if affixed electronically, has the same legal value as my handwritten signature. Any reproduction of this form whose integrity is ensured has the same legal value as the original.

Advisor's name

Code: Dealer Advisor or Agency No. Advisor No.

X
Advisor's signature

Y Y Y Y M M D D
Date

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.

