

Contract No.: \_\_\_\_\_

### 1. Investor's Identification

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\_\_\_\_\_

Last name

\_\_\_\_\_

First name

### 2. Plan Details (Check one box only)

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Non-registered

TFSA

RRSP OR  Spousal RRSP

RRIF OR  Spousal RRIF

LIRA<sup>1</sup>/LRSP<sup>1</sup> OR  LIF<sup>1</sup>

Check one jurisdiction:

Alberta  British Columbia  Manitoba  New Brunswick  Newfoundland and Labrador  Nova Scotia  Ontario  Quebec

Saskatchewan  Federally regulated (including Northwest Territories, Nunavut, Prince Edward Island and Yukon)

Restricted LIF<sup>1</sup> OR  RLSP<sup>1</sup>

PRRIF (Saskatchewan) OR  LRIF<sup>1</sup> (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 judgment or a copy of the death certificate.

### 3. Transaction Types

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#### Preauthorized Purchase (PPP) – Periodic payments or single payment

• Start, change or cease – Use only the FRA1394A Pre-authorized Transaction Program form

Attach the FRA1234A Identification of politically exposed persons and heads of international organizations form if the deposit or the transfer made into a non-registered plan is for \$100,000 or more.

#### Other types of transactions – Please complete the Investment instructions section.

Cash deposit by cheque: \$ \_\_\_\_\_ | Y | Y | Y | Y | M | M | D | D |  
Amount Date of cheque

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

Only one guarantee option is permitted per application. Refer to Section 6.4 of the Information Folder for age limits for subscribing and contributing.

	<b>Amount (\$ or %) – \$400 minimum</b>	
	<b>Cash deposit</b>	<b>External transfer</b>
<b>High-Yield Account</b>		

<b>Beneva Guaranteed Interest Accounts</b> (Beneva GIAs)	<b>Amount (\$ or %) – \$400 minimum per GIA</b>		<b>Investment maturity date (YYYY/MM/DD) or term</b>	<b>Compound Interest (C)</b>	<b>Simple Interest (S) Annual frequency<sup>1</sup></b>	<b>Redeemable or Non-redeemable (R<sup>2</sup>, NR)</b>
	<b>Cash deposit</b>	<b>External transfer</b>				
<b>Product code</b>						

<b>Beneva Guaranteed Investment Funds</b> (Beneva GIFs)	<b>Wire order No.</b> (mandatory if FundSERV)	<b>Fund code Mandatory<sup>3</sup></b>	<b>Amount (\$ or %) – \$400 minimum</b>	
			<b>Cash deposit</b>	<b>External transfer</b>

1. Direct Deposit (attach a cheque specimen)
2. Redeemable investment subject to the applicable fees and penalties
3. The first digit of the fund code indicates the guarantee selected; the second represents the sales option and the three last ones correspond to the fund number. **In the absence of choice for the first two digits, the basic guarantee and no-load sales option will be selected.**

## 5. Important Notice

**Any amount that is allocated to a segregated fund is invested at the risk of the contractholder and may increase or decrease in value.**

Beneva offers a guarantee relative to the contributions the contractholder makes to Beneva Funds. This guarantee ensures that the contractholder holds a minimum given percentage of contributions upon the maturity of the guarantee and upon the death of the annuitant (refer to the Information Folder and to the Fund Facts for more information). The guarantee described herein does not concern fund returns, which are not guaranteed.

A segregated fund consists of a pool of capital held separately from an insurer's other assets, which is managed by professionals and invested in a variety of different securities.

Beneva reserves the right to, at any time, restrict or to no longer accept fund unit purchases, to close down a fund or to change a fund manager.

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

