

1. Identification of Investor

Last name		First name	Date of Birth
Address (No.) Street		Apt.	
Town/City	Province	Postal Code	

2. Source of Amounts

Amounts are transferred only after complete instructions have been provided.

Contract No. Non-Registered Savings Plan (NRSP) RRSP LIRA TFSA RRIF LIF

Indicate transaction date: If not indicated, the date used will be the date the document is received.

Transaction	
Internal transfer → <input type="checkbox"/> Same contract <input type="checkbox"/> Other contract	<input type="checkbox"/> Gross* <input type="checkbox"/> Net
<input type="checkbox"/> Total (If you have GIAs, they will be terminated and charges stipulated in your contract will apply.)	
<input type="checkbox"/> Partial → <input type="checkbox"/> Exempt units without back-load sales charges (Free) <input type="checkbox"/> Amount of \$: _____	
<input type="checkbox"/> Terminated schedule units (Matured) <input type="checkbox"/> Other \$: _____	
<input type="checkbox"/> Free and Matured units	

*If no choice is indicated, this option will apply.

Indicate details for the amounts to transfer in the following table:

Beneva Guaranteed Investment Funds (Beneva GIFs)			Beneva Guaranteed Interest Accounts (Beneva GIAs)		
Fund Code ¹ (see list of Beneva GIFs) Mandatory	(\$ or %)	FundServ No.	(\$)	GIA No.	Maturity date of GIA
					<input type="text"/>
					<input type="text"/>
					<input type="text"/>
					<input type="text"/>

1. 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. Please ensure that the fund code corresponds to the desired investment.

3. Destination of Amounts

If this is a new contract, please complete and attach the application form.

If this transfer is for an existing contract, indicate the allocation instructions below. If no instructions are provided, the same investments and proportions will be maintained.

Contract No. Non-Registered Savings Plan (NRSP) RRSP LIRA TFSA RRIF LIF

Beneva Guaranteed Investment Funds (Beneva GIFs)			Beneva Guaranteed Interest Accounts (Beneva GIAs)			
Fund Code ¹ (see list of Beneva GIFs) Mandatory	(\$ or %)	FundServ No.	(\$ or %)	Term	Interest ² (S or C)	Redeemable ³ (Y or N)

1. 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. Please ensure that the fund code corresponds to the desired investment.

2. S = simple interest; C = compound interest (For Beneva Guaranteed Interest Accounts with simple interest (S), income is paid annually by direct deposit. In the absence of choice, compound interest will be selected.)

3. Y = yes; N = no (In the absence of choice, the Beneva Guaranteed Investment is redeemable.)

4. Consent and Signatures

Advisor's Declaration (signature of advisor is mandatory)

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.

I certify that the investor's signature was affixed by the investor.

Investor's Declaration (signature of investor is mandatory)

I understand that **redemption fees will apply** if I make an internal transfer in the first six years of holding a fund with the **back-load sales charge option** (2nd digit of the fund = 0).

When there is a transfer between two products, my guarantee in the original contract is cancelled for the transferred amounts, and my guarantee in the destination contract will apply to the transferred amounts.

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 Investor	Name in block letters	Date
X	Signature of Co-investor (if applicable)	Name in block letters	Date
X	Signature of Advisor	Advisor Code	Name in block letters
			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.

Reserved for Beneva

Contract No.