

1. Investor's Identification

Contract No.

Last Name

First Name

Address (No.)

Street

Apt.

City/Town

Province

Postal Code

2. Information about the Welcome Bonus

- To be eligible:
 - Minimum investment of \$25,000
 - Amounts must be invested in Beneva Guaranteed Investment Funds (Beneva GIFs) Funds with Advisor chargeback option
- Beneva Guaranteed investment certificates (GICs) are not eligible.
- Transactions made through FundSERV are not eligible for the Welcome Bonus.
- The "Welcome Bonus" is invested as Beneva Fund units deposited in the member's account in accordance with the same investment instructions as the transferred amount.
- If the supporting document indicating the amount of fees charged is not received, then when the transfer is received, only the approximate transfer fee below will be invested as the Welcome Bonus.
- If no approximate transfer fee is indicated below and no supporting document is received at the time of transfer, the amount of the transfer and the Welcome Bonus will be invested only when the supporting document is received.
- Once the transaction is made, Beneva will not make any correction to the Welcome Bonus.

The amount of the Welcome Bonus may not exceed the total fees charged by the ceding financial institution or the total gross sales commission for the transaction.

Approximate transfer fees:

1st transfer: \$ _____ 2nd transfer: \$ _____ 3rd transfer: \$ _____ 4th transfer: \$ _____ 5th transfer: \$ _____

- Beneva reserves the right to demand documentary evidence of fees charged by the ceding company. Completion of this form is mandatory.

3. Consent

By signing below, I (the investor) agree to the following:

- This transfer may have tax consequences and it is my responsibility to contact my tax or legal advisor for more information on this subject.
- I request this transfer because the new product will better meet my financial needs and not only because I'm hoping for a better return on my investments.
- None of the existing contractual provisions (at the ceding company), such as the guarantees or beneficiary designations, will be transferred to the new contract at Beneva.
- This transfer was not recommended to me for the sole purpose of generating a commission, and the commission generated by this transaction may be greater than the amount required to cover the reimbursement of transfer fees.

4. Signatures

X

Investor's Signature

Date

By signing below, I declare that I have informed the investor of all possible consequences of the transfer and that I authorize Beneva Inc. to reimburse the transfer fees from my earned commission. If the investor redeems his funds (in whole or in part) before the end of the chargeback period, I understand that the commission chargeback will apply to all amounts withdrawn, even those for which I did not receive the commission.

Advisor's Name

Advisor's No.

Firm's No.

X

Advisor's Signature

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 beneva.ca.