

Trade made via FundSERV network: **Check here**

Agency code	Advisor code	S.U.	Advisor	Advisor's telephone number	Extension
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Contract no.	Annuitant's first and last name (in block letters)	FundSERV contract <small>Dealer code Intermediary code</small>
<input type="text"/>	<input type="text"/>	<input type="text"/>

1. INTER-FUND TRANSFER

Source funds				Destination funds						
<input type="checkbox"/> Total balance of funds transferred to destination 1 fund(s)				Attention The total percentage of the destination fund(s) must equal 100%. Check fund codes against table F13-1000A.						
	Fund code	<input type="checkbox"/> % <input type="checkbox"/> \$ <input type="checkbox"/> Units	Order no.	➤	Fund code	<input type="checkbox"/> % <input type="checkbox"/> \$ <input type="checkbox"/> Units	Fund code	<input type="checkbox"/> % <input type="checkbox"/> \$ <input type="checkbox"/> Units	Fund code	<input type="checkbox"/> % <input type="checkbox"/> \$ <input type="checkbox"/> Units
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	➤	A. <input type="text"/>	<input type="text"/>	C. <input type="text"/>	<input type="text"/>	E. <input type="text"/>	<input type="text"/>
					B. <input type="text"/>	<input type="text"/>	D. <input type="text"/>	<input type="text"/>	F. <input type="text"/>	<input type="text"/>
<input type="checkbox"/> Check if same destination as #1										
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	➤	A. <input type="text"/>	<input type="text"/>	C. <input type="text"/>	<input type="text"/>	E. <input type="text"/>	<input type="text"/>
					B. <input type="text"/>	<input type="text"/>	D. <input type="text"/>	<input type="text"/>	F. <input type="text"/>	<input type="text"/>
<input type="checkbox"/> Check if same destination as #1										
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	➤	A. <input type="text"/>	<input type="text"/>	C. <input type="text"/>	<input type="text"/>	E. <input type="text"/>	<input type="text"/>
					B. <input type="text"/>	<input type="text"/>	D. <input type="text"/>	<input type="text"/>	F. <input type="text"/>	<input type="text"/>
<input type="checkbox"/> Check if same destination as #1										
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	➤	A. <input type="text"/>	<input type="text"/>	C. <input type="text"/>	<input type="text"/>	E. <input type="text"/>	<input type="text"/>
					B. <input type="text"/>	<input type="text"/>	D. <input type="text"/>	<input type="text"/>	F. <input type="text"/>	<input type="text"/>
<input type="checkbox"/> Check if same destination as #1										
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	➤	A. <input type="text"/>	<input type="text"/>	C. <input type="text"/>	<input type="text"/>	E. <input type="text"/>	<input type="text"/>
					B. <input type="text"/>	<input type="text"/>	D. <input type="text"/>	<input type="text"/>	F. <input type="text"/>	<input type="text"/>
<input type="checkbox"/> Check if same destination as #1										

! If the selected investments do not match the investment type suggested by the current investor profile, please provide the reason(s):

2. CHANGE TO AUTOMATIC INVESTMENT TERM OR AUTOMATIC WITHDRAWAL TERM

Process the change request to the new destination fund as a change in the:

- Automatic investment term of the Daily Interest Fund+ (DIF+)
- Automatic investment term of the pre-authorized debit (AIT PAD)
- Automatic withdrawal term (AWT)

The AIT can be selected if there is only one destination in section 1, even if the destination includes several funds.
The AIT is not available for the Income Stage funds of the FORLIFE Series.

3. SPECIAL INSTRUCTIONS

4. SIGNATURES

I request that the transactions indicated above be carried out in accordance with the rights, conditions and stipulations of the contract. If the requested transaction is an inter-series switch from the FORLIFE Series, the Ecoflextra Series or the Guaranteed Surrender Series to another series in the same contract, I am aware that the conditions regarding the guarantees will be modified as per the rules of the new series.

X _____	X _____	X _____	<table border="0" style="width:100%"> <tr> <td style="text-align: center;">Y</td><td style="text-align: center;">Y</td><td style="text-align: center;">Y</td><td style="text-align: center;">Y</td><td style="text-align: center;">M</td><td style="text-align: center;">M</td><td style="text-align: center;">D</td><td style="text-align: center;">D</td> </tr> <tr> <td style="text-align: center;"> </td><td style="text-align: center;"> </td><td style="text-align: center;"> </td><td style="text-align: center;"> </td><td style="text-align: center;"> </td><td style="text-align: center;"> </td><td style="text-align: center;"> </td><td style="text-align: center;"> </td> </tr> <tr> <td colspan="8" style="text-align: center;">Date</td> </tr> </table>	Y	Y	Y	Y	M	M	D	D									Date							
Y	Y	Y	Y	M	M	D	D																				
Date																											
Applicant / Assignee / Subscriber <i>(MANDATORY if no LTA on contract)</i>	Co-applicant / Joint subscriber	Advisor																									

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5. ECOFLEXTRA CONTRACT — CLASSIC SERIES 75/75 AND GUARANTEED SURRENDER SERIES — NOT AVAILABLE FOR IAG SRP SERIES

- No-fee transfer of 10% of the amount from a deferred sales charge (DSC) fund to the corresponding front-end load (FEL) fund in the same series (the transfer is prorated for the unmatured amounts held in the funds).
- No-fee transfer of 10% in other funds (complete section 1).

6. TRANSFER WITHIN CONTRACT

! The following rule applies when the destination is Investment Funds: The fee type must be FEL at 0% or F-Class if the investment transferred from the High Interest Savings Account or DIF+ was initially invested in investments funds.

Source	
<input type="checkbox"/> a) Total transfer	
<input type="checkbox"/> b) Partial transfer: _____ \$	
<input type="checkbox"/> Daily Interest Fund+ (DIF+) _____ <input type="checkbox"/> \$ OR <input type="checkbox"/> %	
<input type="checkbox"/> High Interest Savings Account _____ <input type="checkbox"/> \$ OR <input type="checkbox"/> %	
<input type="checkbox"/> Investment Funds ! Surrender fees established in the contract apply	

Fund code	<input type="checkbox"/> % <input type="checkbox"/> \$ <input type="checkbox"/> Units
A.	
B.	
C.	

Destination	
<input type="checkbox"/> Daily Interest Fund+ (DIF+)	
<input type="checkbox"/> High Interest Savings Account	
<input type="checkbox"/> Investment Funds ! For an initial investment in F-Class funds, form F51-348A F-Class Funds Advisory Fee Agreement is required.	

Fund code	<input type="checkbox"/> % <input type="checkbox"/> \$	Fund code	<input type="checkbox"/> % <input type="checkbox"/> \$
A.		D.	
B.		E.	
C.		F.	

Guaranteed Interest Fund

Deposit date	Deposit amount	Amount to be surrendered	Time of surrender
____/____/____	\$ _____	<input type="checkbox"/> Totality <input type="checkbox"/> Interest <input type="checkbox"/> \$ _____	<input type="checkbox"/> Before maturity <input type="checkbox"/> At maturity

<input type="checkbox"/> % <input type="checkbox"/> \$	Term	Rate	Interest payment option
A.			
B.			
C.			

7. TOTAL INTER-SERIES SWITCH TO THE SAME DESTINATION FUND(S) OR TO THE FORLIFE SERIES INCOME STAGE

Name of source series	Name of destination series
<input type="text"/>	<input type="text"/>

Note: For the Guaranteed Surrender Series and Ecoflextra Series 75/100, total transfer is mandatory; no partial transfer is permitted. For a partial inter-series switch, complete section 1. Only available for FORLIFE Series contracts issued after November 24, 2014 (inclusive).

8. SPECIAL INSTRUCTIONS

9. SIGNATURES

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Y	Y	Y	Y	M	M	D	D												
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