



For investment planning advice, call CDSPI Advisory Services Inc.:
1-877-293-9455 (toll-free) or (416) 296-9455 Ext. 5023

For assistance filling out this form, call CDSPI:
1-800-561-9401 (toll-free) or (416) 296-9401 Ext. 5020

Please return the completed form to:
CDSPI, 155 Lesmill Road, Toronto, Ontario M3B 2T8
Fax: 1-866-561-2250 (toll-free) or (416) 296-9459
E-mail queries: investment@cdspi.com

Annuity Contract Issued By: Sun Life Assurance Company of Canada

Deposit Form

Investment Products

10-101

SECTION 1 INVESTOR INFORMATION

A. Name of Applicant (please print):

Check one: Dr. Mr. Mrs. Miss Ms. _____
 Last First Middle or Initial

SECTION 2 DEPOSIT INFORMATION

A. Form of Deposit: (check 1 or 2)

1: Cheque Enclosed – in the amount of \$ _____

Note: Make cheque payable to CDSPI and mail it to the address listed above.

OR

2: Direct Deposit (Complete the information below)

Financial Institution _____

Account No. (up to 11 digits) | | | | | | | | | | | | |

Financial Institution # (must be 3 digits) | | |

Transit # (must be 5 digits) | | | | |

Signature of Account Holder _____

Signature of Account Holder * _____

Please include a blank cheque marked "VOID". * This agreement must be signed by all persons whose signature is required to sign on the above account.

B. Deposit to (check one):

CDA RSP Plan # _____

Is this a Spousal RSP Plan? Yes No

If "Yes", specify name of contributor _____

CDA TFSA (Tax-Free Savings Account Plan) # _____

CDA Investment Account Plan # _____

CDA RESP Plan # _____

Proportion of RESP Contribution (check one):

Equally among all beneficiaries; or

Not equally among all beneficiaries (complete the chart below)

	RESP Beneficiary	Amount
1.	_____	\$ _____
2.	_____	\$ _____
3.	_____	\$ _____
4.	_____	\$ _____
		Total Deposit \$ _____

SECTION 3 ASSET ALLOCATION

Important: Before choosing funds, you are strongly advised to contact an advisor at the above phone number.

Invest My Deposit As Indicated:

Aggressive Equity Fund (Altamira)	\$ _____	Pacific Basin Fund (CI)	\$ _____
Balanced Fund (PH&N)	\$ _____	S & P 500 Index Fund (BlackRock®)	\$ _____
Balanced Value Fund (McLean Budden)	\$ _____	TSX Composite Index Fund (BlackRock®)	\$ _____
Bond Fund (PH&N)	\$ _____	US Large Cap Fund (Capital Intl)	\$ _____
Bond & Mortgage Fund (Fiera)	\$ _____	US Small Cap Fund (Trimark)	\$ _____
Canadian Equity Fund (Trimark)	\$ _____	Guaranteed Fund (Sun Life) 1 Yr.	\$ _____
Common Stock Fund (Altamira)	\$ _____	Guaranteed Fund (Sun Life) 2 Yr.	\$ _____
Dividend Fund (PH&N)	\$ _____	Guaranteed Fund (Sun Life) 3 Yr.	\$ _____
Emerging Markets Fund (Brandes)	\$ _____	Guaranteed Fund (Sun Life) 4 Yr.	\$ _____
European Fund (Trimark)	\$ _____	Guaranteed Fund (Sun Life) 5 Yr.	\$ _____
Fixed Income Fund (McLean Budden)	\$ _____		
Global Fund (Trimark)	\$ _____	Corporate Class Funds	
Global Growth Fund (Capital Intl)	\$ _____	CDA Canadian Bond Fund Corporate Class (CI)	\$ _____
High Income Fund (Sceptre)	\$ _____	CDA Corporate Bond Fund Corporate Class (CI)	\$ _____
International Equity Fund (CC&L)	\$ _____	CDA Income and Growth Fund Corporate Class (CI)	\$ _____
Money Market Fund (Fiera)	\$ _____		

The CDA Managed Risk Portfolios

Index Fund Portfolios*[†]

CDA Conservative Index Portfolio (BlackRock®)	\$ _____
CDA Moderate Index Portfolio (BlackRock®)	\$ _____
CDA Aggressive Index Portfolio (BlackRock®)	\$ _____
Income/Equity Fund Portfolios** ^{††}	
CDA Income Portfolio (CI)	\$ _____
CDA Income Plus Portfolio (CI)	\$ _____
CDA Balanced Portfolio (CI)	\$ _____
CDA Conservative Growth Portfolio (CI)	\$ _____
CDA Moderate Growth Portfolio (CI)	\$ _____
CDA Aggressive Growth Portfolio (CI)	\$ _____
Total Deposit	\$ _____

* In order of increasing equity content.
[†] Each of the index wrap funds has an underlying mix of BlackRock funds.
^{††} Each of the income/equity wrap funds has an underlying mix of between seven to 15 CI funds.
 BlackRock is a registered trade-mark of BlackRock, Inc.

SECTION 4 AUTHORIZATION

Investor's Signature _____ Date | | | | | | | | | | | | |
 Day Month Year

For current unit values of the CDA Funds and Guaranteed Fund rates, visit www.cdspi.com/values-rates.
 To download additional copies of this form, visit www.cdspi.com/invest, click on "Applications/Forms", then "Deposit Form."