

INVESTMENT PRODUCTS

Deposit Form

For investment planning advice or assistance filling out this form, call:
1.800.561.9401 or 416.296.9401

Please return the completed form to:
CDSPi, 155 Lesmill Road, Toronto, ON M3B 2T8
Fax: 1.866.561.2250 or 416.296.9459
E-mail: investment@cdspi.com

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Annuity Contract Issued By: Sun Life Assurance Company of Canada

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 – in the amount of \$ _____

Note: Complete the information below. Please include a blank cheque marked "VOID".

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* _____

This agreement must be signed by all persons whose signature is required to sign on the above account.

B. Deposit to (check one):

RSP Account # _____

Is this a Spousal RSP Account? Yes No

If "Yes", specify name of contributor _____

TFSA Account # _____

Investment Account # _____

RESP Account # _____

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. The minimum initial purchase per investment fund is \$50 (and the minimum additional purchase per investment fund is \$25) with the exception of Guaranteed Funds, which are each subject to a minimum \$500 deposit.

Invest My Deposit As Indicated:

Aggressive Equity Fund (Fiera Capital)	\$ _____	Pacific Basin Fund (CI)	\$ _____	Managed Risk Portfolios	
Balanced Fund (PH&N)	\$ _____	S & P 500 Index Fund (BlackRock®)	\$ _____	Index Fund Portfolios*†	
Balanced Value Fund (MFS)	\$ _____	TSX Composite Index Fund (BlackRock®)	\$ _____	Conservative Index Portfolio (BlackRock®)	\$ _____
Bond Fund (PH&N)	\$ _____	US Large Cap Fund (Capital Intl)	\$ _____	Moderate Index Portfolio (BlackRock®)	\$ _____
Bond & Mortgage Fund (Fiera Capital)	\$ _____	US Small Cap Fund (Invesco)	\$ _____	Aggressive Index Portfolio (BlackRock®)	\$ _____
Canadian Equity Fund (Invesco)	\$ _____	Guaranteed Fund (Sun Life) 1 Yr.	\$ _____	Income/Equity Fund Portfolios*††	
Common Stock Fund (Fiera Capital)	\$ _____	Guaranteed Fund (Sun Life) 2 Yr.	\$ _____	Income Portfolio (CI)	\$ _____
Dividend Fund (PH&N)	\$ _____	Guaranteed Fund (Sun Life) 3 Yr.	\$ _____	Income Plus Portfolio (CI)	\$ _____
Emerging Markets Fund (Brandes)	\$ _____	Guaranteed Fund (Sun Life) 4 Yr.	\$ _____	Balanced Portfolio (CI)	\$ _____
European Fund (Invesco)	\$ _____	Guaranteed Fund (Sun Life) 5 Yr.	\$ _____	Conservative Growth Portfolio (CI)	\$ _____
Fixed Income Fund (MFS)	\$ _____	Corporate Class Funds		Moderate Growth Portfolio (CI)	\$ _____
Global Fund (Invesco)	\$ _____	Canadian Bond Fund Corporate Class (CI)	\$ _____	Aggressive Growth Portfolio (CI)	\$ _____
Global Growth Fund (Capital Intl)	\$ _____	Canadian Equity Fund Corporate Class (CI)	\$ _____	Total Deposit \$ _____	
Global Real Estate Fund (Invesco)	\$ _____	Corporate Bond Fund Corporate Class (CI)	\$ _____		
International Equity Fund (CC&L)	\$ _____	Income and Growth Fund Corporate Class (CI)	\$ _____		
Money Market Fund (Fiera Capital)	\$ _____	Short-Term Fund Corporate Class (CI)	\$ _____		

* 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 8 - 18 CI funds.

BlackRock is a registered trade-mark of BlackRock, Inc.

SECTION 4 AUTHORIZATION

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

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