

# 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)	\$ _____	<b>Managed Risk Portfolios</b>	
Balanced Fund (PH&N)	\$ _____	S & P 500 Index Fund (BlackRock®)	\$ _____	<b>Index Fund Portfolios*†</b>	
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 (Trimark)	\$ _____	Aggressive Index Portfolio (BlackRock®)	\$ _____
Canadian Equity Fund (Trimark)	\$ _____	Guaranteed Fund (Sun Life) 1 Yr.	\$ _____	<b>Income/Equity Fund Portfolios*††</b>	
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 (Trimark)	\$ _____	Guaranteed Fund (Sun Life) 5 Yr.	\$ _____	Conservative Growth Portfolio (CI)	\$ _____
Fixed Income Fund (MFS)	\$ _____	<b>Corporate Class Funds</b>		Moderate Growth Portfolio (CI)	\$ _____
Global Fund (Trimark)	\$ _____	Canadian Bond Fund Corporate Class (CI)	\$ _____	Aggressive Growth Portfolio (CI)	\$ _____
Global Growth Fund (Capital Intl)	\$ _____	Canadian Equity Fund Corporate Class (CI)	\$ _____	<b>Total Deposit \$ _____</b>	
Global Real Estate Fund (Invesco)	\$ _____	Corporate Bond Fund Corporate Class (CI)	\$ _____		
High Income Fund (Fiera Capital)	\$ _____	Income and Growth Fund Corporate Class (CI)	\$ _____		
International Equity Fund (CC&L)	\$ _____	Short-Term Fund Corporate Class (CI)	\$ _____		
Money Market Fund (Fiera Capital)	\$ _____				

\* 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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