

Interfund Transfer 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

Annuity Contract Issued By: Sun Life Assurance Company of Canada

INVESTOR INFORMATION

A) Name of applicant _____ Plan #: _____
First Last Initials

INTERFUND TRANSFER*

A) Plan: RSP Investment Account TFSA RIF RESP

B) Desired changes: Please choose to do one: • Under "Transfer", for specific funds indicate under "\$ From" how much money you would like to transfer out, and under "\$ To" indicate how much you would like to put into specific funds (column totals must be equal), **OR**
 • Under "Final Allocation", indicate how all the assets should be allocated as an end result.

Fund Name	Transfer		OR	Final Allocation %
	\$ From	\$ To		
Aggressive Equity (Fiera Capital)				
Balanced Fund (PH&N)				
Balanced Value (MFS)				
Bond Fund (PH&N)				
Bond & Mortgage (Fiera Capital)				
Canadian Equity (Trimark)				
Common Stock (Fiera Capital)				
Dividend Fund (PH&N)				
Emerging Markets (Brandes)				
European Fund (Trimark)				
Fixed Income (MFS)				
Global Fund (Trimark)				
Global Growth (Capital Intl.)				
Global Real Estate Fund (Invesco)				
High Income Fund (Fiera Capital)				
International Equity (CC&L)				
Money Market (Fiera Capital)				
Pacific Basin (CI)				
S&P 500 Index (BlackRock®)				
TSX Composite Index (BlackRock®)				
US Large Cap (Capital Intl.)				
US Small Cap (Trimark)				
Guaranteed Funds (SunLife Assurance)**				
Managed Risk Portfolios (Index)				
Conservative Index (BlackRock®)				
Moderate Index (BlackRock®)				
Aggressive Index (BlackRock®)				
Managed Risk Portfolios (Income/Equity)				
Income (CI)				
Income Plus (CI)				
Balanced (CI)				
Conservative Growth (CI)				
Moderate Growth (CI)				
Aggressive Growth (CI)				
Corporate Class Funds				
Canadian Bond Fund Corporate Class (CI)				
Canadian Equity Fund Corporate Class (CI)				
Corporate Bond Fund Corporate Class (CI)				
Income and Growth Fund Corporate Class (CI)				
Short-Term Fund Corporate Class (CI)				
Totals (must be equal)				100%

* Notes: The minimum initial purchase per investment fund is \$50; the minimum additional purchase per investment fund is \$25; the minimum pre-authorized contribution per investment fund is \$25 (with the exception of Guaranteed Funds, which are each subject to a minimum \$500 deposit). Surcharges may be levied for short-term trading.

** Guaranteed Funds that are not matured cannot be switched and cannot be part of the Final Allocation.

AUTHORIZATION

Investor Signature _____ Date _____
Day Month Year

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Written by: _____ Processed by: _____ Transaction #: _____ Valuation Date: _____