

Paperless Investment Statements Authorization Form

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

Annuity Contract Issued By: Sun Life Assurance Company of Canada

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

I am signing this consent to confirm that I do not wish to receive future quarterly investment statements for my CDSPI fund plan account(s) (as outlined below) by regular mail. I understand that I can access my statement electronically by logging into my account via www.cdspi.com and entering my Client Number and Password. If I do not know my Client Number and/or Password, I will contact CDSPI to obtain that information.

I understand that I must provide a valid e-mail address in order to select the paperless investment statements option. Otherwise, I will continue to receive paper statements. I will notify CDSPI of any changes to my e-mail address.

I understand I will receive an e-mail reminder quarterly when a new statement is available for viewing online.

I understand that by choosing the paperless investment statements option, I am doing so for all accounts opened under my client number. Each quarter, one investment statement will be issued listing all of my accounts and their activity for the quarter.

I acknowledge that I may receive from CDSPI a paper copy of any documents accessed by me electronically at no cost if I contact CDSPI in writing.

I understand that my consent may be revoked or changed at any time by notifying CDSPI in writing.

I have read and understood the provisions set out in this consent form.

Name of Account Holder (Please Print)

Client Number — Listed at the top-right of your paper statement

E-mail Address

Signature of Account Holder

Date (D/M/Y)