

APPLICATION

To Convert Basic Life Insurance and/or Family Life Insurance to Term 100 Life Insurance

For assistance in filling out this application call: **CDSPI Advisory Services Inc.**
1.800.561.9401 or 416.296.9401, E-mail: insurance@cdspi.com

Please complete all pertinent questions to avoid processing delays and return to: **CDSPI**,
2005 Sheppard Ave East, Suite 500, Toronto, Ontario M2J 5B4 Fax: 1.866.337.3389 or 416.296.8920
Accessible formats and communication supports are available upon request. Visit cdspi.com/accessibility for more information.

INDIVIDUAL INFORMATION

Section 1 Applicant Information

1. Name (please print):
Check one: Dr. Mr. Mrs. Miss Ms. Corporation

Last (or name of partnership or corporation) First Middle or Middle Initial
2. Individuals only: Male Female
3. Mailing Address:
Check one: Home Business

Street and Number Suite No.

City/Town Province Postal Code
4. _____
Business Telephone Home Telephone

Mobile Telephone Fax
5. _____
E-mail Address (please include to expedite the application process)
6. Language Preference: English French
7. A. Account Number (if known): _____
B. Payment Frequency (Choose one):
 Same as current
(Only applies if you are an existing client paying premiums)
 Annually
 Quarterly*
 Monthly*
(If paying monthly, you must select Automatic Payments under the Payment Method section below)
*A 2.23% processing charge applies to monthly and quarterly payments.
C. Payment Method (Choose one):
 Invoice (Will be mailed to your address on file for payment.)
 Automatic Payments
 Pre-authorized Chequing Plan (PAC) -
Please complete a Pre-Authorized Chequing Plan Form
 VISA/MasterCard -
CDSPI will contact you to obtain credit card details upon receipt of your application.

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COVERAGE APPLIED FOR

Section 3 Coverage Being Converted

You may convert up to the amount of Basic Life or Family Life coverage you have in force, but not beyond the plan maximum shown in Question 3.

1. Are the premiums for the life insurance plan being converted currently being waived? Yes No

If "Yes", you are not eligible to convert your coverage at this time. Please contact CDSPI Advisory Services Inc. for more information.

2. Insurance coverage to be converted to Term 100 Life Insurance (*check one*):
- Basic Life Insurance
 - Spouse Family Life Insurance
 - Adult Child Family Life Insurance
 - Spouse of Adult Child Family Life Insurance

3. Amount of coverage to be converted to Term 100 Life Insurance (Minimum: \$50,000; Plan Maximum: \$1 million, including existing coverage)

Coverage Amount: \$ _____

AND

Policy Number(s): _____

OR

(*check if desired*) All Policies

4. Waiver of Premium Option

If your coverage to be converted includes the Waiver of Premium Option, do you wish to continue that option on your Term 100 coverage? Yes No

Section 4 Beneficiaries

The beneficiary for your converted coverage will be the beneficiary on your existing coverage (and your contingent beneficiary). To change the beneficiary or contingent beneficiary, please contact CDSPI Advisory Services Inc. to obtain a Beneficiary Designation form. Your right to alter the interest of any beneficiary or contingent beneficiary is subject to any applicable law.

