

# Deposit Form

For investment planning advice or assistance filling out this form, call: **CDSPI Advisory Services Inc.**  
1.800.561.9401 or 416.296.9401, Email: investment@cdspi.com

Please return the completed form to:

**CDSPI**, 2005 Sheppard Ave East, Suite 500, Toronto, ON M2J 5B4 or fax to 1.866.561.2250 or 416.296.9459

*Annuity Contract Issued By: Sun Life Assurance Company of Canada*

**SECTION 1 Account Holder Information**

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

\_\_\_\_\_

Last Name
First Name
Initial
Account #

**SECTION 2 Deposit Details**

**A. Amount of Deposit**

\$ \_\_\_\_\_

**B. Account Type**

- RRSP  TFSA  NREG
- RESP: 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. _____	\$ _____
<b>Total Deposit</b>	<b>\$ _____</b>

**C. Form of Deposit** (choose one):

- Cheque Payable to CDSPI
- Electronic Funds Transfer (EFT) from my Bank Account

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

\_\_\_\_\_

Canadian Bank Name

\_\_\_\_\_

Bank#
Branch/Transit#
Account#

\_\_\_\_\_

\*Signature of Bank Account Holder

\_\_\_\_\_

\*Signature of Bank Account Holder

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

**SECTION 3 Fund Selection**

**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.

Please turn over ►

**SECTION 3** Fund Selection (continued)

FUND NAME	AMOUNT
<b>Investment Funds</b>	
Aggressive Equity Fund (Fiera Capital)	\$
Balanced Fund (PH&N)	\$
Balanced Value Fund (MFS)	\$
Bond Fund (PH&N)	\$
Bond & Mortgage Fund (Fiera Capital)	\$
Canadian Equity Fund (Invesco)	\$
Common Stock Fund (Fiera Capital)	\$
Core Plus Bond Fund (PH&N)	\$
Diversified Growth Fund (Schroder)	\$
Dividend Fund (PH&N)	\$
Emerging Markets Fund (Brandes)	\$
European Fund (Invesco)	\$
Fixed Income Fund (MFS)	\$
Global Fund (Invesco)	\$
Global Growth Fund (Capital Intl)	\$
Global Real Estate Fund (Invesco)	\$
International Equity Fund (CC&L)	\$
Low Volatility Global Equity Fund (MFS)	\$
Money Market Fund (Fiera Capital)	\$
Pacific Basin Fund (CI)	\$
S&P 500 Index Fund (BlackRock®)	\$
TSX Composite Index Fund (BlackRock®)	\$
US Large Cap Fund (Capital Intl)	\$
US Small Cap Fund (Invesco)	\$
<b>Guaranteed Funds</b>	
1 Year	\$
2 Year	\$
3 Year	\$
4 Year	\$
5 Year	\$

\*In order of increasing equity content.  
BlackRock® is a registered trade-mark of BlackRock, Inc.

FUND NAME	AMOUNT
<b>Corporate Class Funds</b>	
Canadian Bond Fund Corporate Class (CI)	\$
Corporate Bond Fund Corporate Class (CI)	\$
Canadian Equity Fund Corporate Class (CI)	\$
Income and Growth Fund Corporate Class (CI)	\$
Short-Term Fund Corporate Class (CI)	\$
<b>Managed Risk Portfolios</b>	
▶ <b>Index Fund Portfolios*</b>	
Conservative Index Portfolio (BlackRock®)	\$
Moderate Index Portfolio (BlackRock®)	\$
Aggressive Index Portfolio (BlackRock®)	\$
▶ <b>Income/Equity Fund Portfolios*</b>	
Income Portfolio (CI)	\$
Income Plus Portfolio (CI)	\$
Balanced Portfolio (CI)	\$
Conservative Growth Portfolio (CI)	\$
Moderate Growth Portfolio (CI)	\$
Aggressive Growth Portfolio (CI)	\$
▶ <b>Granite Target Risk Portfolios*</b>	
Granite Conservative Portfolio (Sun Life)	\$
Granite Moderate Portfolio (Sun Life)	\$
Granite Balanced Portfolio (Sun Life)	\$
Granite Growth Portfolio (Sun Life)	\$
Granite Aggressive Portfolio (Sun Life)	\$
<b>Total Deposit</b>	<b>\$</b>

**SECTION 4** Authorization (signed and dated by Account Holder)

\_\_\_\_\_  
Signature of Account Holder

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Date (DD/MM/YYYY)

**CDSPI Internal Use**

\_\_\_\_\_  
Authorized by

\_\_\_\_\_  
Processed by

\_\_\_\_\_  
Transaction #

\_\_\_\_\_  
Valuation Date