

Interfund Transfer 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 Interfund Transfer

Please choose to do one:

- Under "Transfer", for specific funds indicate under "% or \$ From" how much money you would like to transfer out, and under "% or \$ 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 | | | | |
| | % | OR | \$ | % | OR | \$ | | |
| Investment Funds | | | | | | | | |
| 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) | | | | | | | | |
| S&P 500 Index Fund (BlackRock®) | | | | | | | | |
| TSX Composite Index Fund (BlackRock®) | | | | | | | | |
| US Large Cap Fund (Capital Intl) | | | | | | | | |
| US Small Cap Fund (Invesco) | | | | | | | | |

Please turn over ►

SECTION 2 Interfund Transfer (continued)

| FUND NAME | TRANSFER | | | | | | OR | FINAL ALLOCATION |
|---|-------------|----|-----------|-------------|----|-----------|-------------|------------------|
| | FROM | | | TO | | | | |
| | % | OR | \$ | % | OR | \$ | % | |
| Guaranteed Funds* | | | | | | | | |
| 1 Year | | | | | | | | |
| 2 Year | | | | | | | | |
| 3 Year | | | | | | | | |
| 4 Year | | | | | | | | |
| 5 Year | | | | | | | | |
| Corporate Class Funds | | | | | | | | |
| 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) | | | | | | | | |
| Managed Risk Portfolios | | | | | | | | |
| ▶ Index Fund Portfolios | | | | | | | | |
| Conservative Index Portfolio (BlackRock®) | | | | | | | | |
| Moderate Index Portfolio (BlackRock®) | | | | | | | | |
| Aggressive Index Portfolio (BlackRock®) | | | | | | | | |
| ▶ Income/Equity Fund Portfolios | | | | | | | | |
| Income Portfolio (CI) | | | | | | | | |
| Income Plus Portfolio (CI) | | | | | | | | |
| Balanced Portfolio (CI) | | | | | | | | |
| Conservative Growth Portfolio (CI) | | | | | | | | |
| Moderate Growth Portfolio (CI) | | | | | | | | |
| Aggressive Growth Portfolio (CI) | | | | | | | | |
| ▶ Granite Target Risk Portfolios | | | | | | | | |
| 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) | | | | | | | | |
| Total (must be equal) | 100% | | \$ | 100% | | \$ | 100% | |

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

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

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SECTION 3 Authorization (signed and dated by Account Holder)

Signature of Account Holder

| | | | | | | | |
|--|--|--|--|--|--|--|--|
| | | | | | | | |
|--|--|--|--|--|--|--|--|

Date (DD/MM/YYYY)

CDSPI Internal Use

Authorized by

Processed by

Transaction #

Valuation Date