

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 #
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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)								
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)								

Please turn over ►

SECTION 2 Interfund Transfer (continued)

FUND NAME	TRANSFER						OR	FINAL ALLOCATION
	FROM %	OR	\$	TO %	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

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Date (DD/MM/YYYY)

CDSPI Internal Use

Authorized by

Processed by

Transaction #

Valuation Date