

Automatic Rebalancing Service

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

NOTE: CDSPI offers an automatic rebalancing service to participants in the Investment Program. At the intervals selected, CDSPI will review your account and will automatically transfer money between the CDSPI funds to maintain the allocation you have specified. There is no fee for this service.

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 Rebalancing Instructions

A. Please maintain the following asset allocation (must total 100%)

FUND NAME	PERCENTAGE
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)	%

FUND NAME	PERCENTAGE
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)	%

*In order of increasing equity content.

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SECTION 2 Rebalancing Instructions (continued)

NOTE: Due to their fixed nature, any Guaranteed Funds will not be considered part of the overall portfolio for this service and will not be rebalanced. For assistance, contact CDSPI.

B. Frequency of Rebalancing Annual Semi-Annual

(If you do not make a frequency election, your portfolio will be rebalanced semi-annually. If any specified date for the rebalancing is not a business day, the rebalancing will be completed on the first business day after the specified date.)

C. First Rebalancing Date

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(DD/MM/YYYY)

SECTION 3 Authorization (signed and dated by Account Holder)

I hereby authorize and direct CDSPI to automatically rebalance my account based on the frequency stated above by switching investments to return to the asset allocation shown above. I understand that there may be tax implications for these transactions for the Investment Program's Investment Accounts. This authorization and direction will remain in effect until I revoke it in writing.

Signature of Account Holder

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Date (DD/MM/YYYY)

CDSPI Internal Use

Authorized by Processed by Transaction # Valuation Date