



**Application for membership in a tax-free savings account (continued)**

**SECTION 6 – TRUSTEE APPOINTMENT**

**(to be completed if any of the beneficiaries are minors or otherwise lack legal capacity AND DO NOT RESIDE IN QUEBEC)**

If a formal trust does not exist, I hereby appoint:

Full name of trustee being appointed (last name, then first):	Trustee for (indicate beneficiary name)	Relationship of trustee to holder:

as trustee to receive, in trust, all benefits payable to any beneficiary designated under the plan who, at the time benefits are paid, is a minor or lacks legal capacity to give a valid discharge according to the laws of the beneficiary's domicile. Payment of benefits to the trustee discharges London Life to the extent of the payment. I authorize the trustee in his or her sole discretion to use the benefits for the education or maintenance of the beneficiary and to exercise any right of the beneficiary under the plan. The trustee may, in addition to the investments authorized for trustees, invest in any product of, or offered by, London Life or its affiliated financial institutions. The trust for any beneficiary will terminate once that beneficiary is both of age of majority and has legal capacity to give a valid discharge. I direct the trustee to deliver at that time to the beneficiary the assets held in trust for that beneficiary. I or my personal representative may by writing appoint a new trustee to replace the former trustee.

**SECTION 7 – INVESTMENT ALLOCATION INSTRUCTIONS**

Please provide investment instructions. The Issuer offers a selection of both guaranteed investments and variable investment funds. **Contributions directed to variable investment funds are not guaranteed and will increase or decrease in value according to fluctuations in the market value of the assets.** If no election is made, contributions will be invested in the default investment option.

**If you invest in an Asset Allocation Fund, check the fund below then go directly to section 8.**

**Asset Allocation Funds** (choose only one fund)

- Conservative Continuum PSG S605 100%
- Moderate Continuum PSG S606 100%
- Balanced Continuum PSG S607 100%
- Advanced Continuum PSG S608 100%
- Aggressive Continuum PSG S609 100%

If you choose to invest in any of the funds listed below, write the percentage of your contributions beside the fund that you want to invest in. **The minimum you can invest in each fund is 5%. Check to ensure your percentage allocations add up to 100%.**

**Cash and Equivalent Funds**

- 1 Yr Compound Interest Account C11 \_\_\_\_\_ %
- 3 Yr Compound Interest Account C13 \_\_\_\_\_ %
- 5 Yr Compound Interest Account C15 \_\_\_\_\_ %
- Money Market Fund MFS S143 \_\_\_\_\_ %

**Fixed Income Fund**

- Fixed Income Fund MFS FIMB \_\_\_\_\_ %

Total allocation must equal 100%

**SECTION 8 – CONFIDENTIAL INFORMATION FILE**

The Issuer will establish a confidential information file that contains personal information concerning the holder. By submitting a written request to the Issuer, the holder may exercise rights of access to, and rectification of, the file. The Issuer will collect, use and disclose the holder's personal information to: process this application and provide, administer and service the plan applied for (including service quality assessments by or on behalf of the Issuer); advise the holder of products and services to help the holder plan for financial security; investigate, if required, and pay benefits under the plan; create and maintain records concerning our relationship as appropriate; and, fulfil such other purposes as are directly related to the preceding. The Issuer may use service providers within or outside Canada. Personal information concerning the holder will only be available to the holder, plan sponsor, government authorities, the Issuer, their affiliates, within or outside Canada, and any duly authorized employees, agents and representatives of the Issuer or their affiliates, for or related to the purpose of the plan, except as otherwise may be required, authorized or allowed by law or legal process, or by the holder. In all cases, availability is subject to lawful determination by the Issuer. Personal information is collected, used, disclosed, or otherwise processed or handled in accordance with governing law, including applicable privacy legislation, and the holder's personal information may be subject to disclosure to those authorized under applicable law within or outside Canada.

**SECTION 9 – ELECTION FOR REGISTRATION**

I apply for membership in the tax-free savings account and authorize the plan sponsor to act as my agent for the purpose of the plan. I request that London Life Insurance Company (the "Issuer") file an election with the Minister of National Revenue to register the qualifying arrangement as a tax-free savings account under the Income Tax Act (Canada) and any similar provincial law. My tax-free savings account will be effective on the date this application is signed.

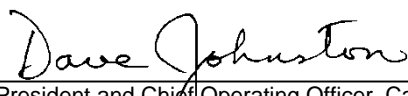
**SECTION 10 – SIGNATURE**

I confirm the instructions, designations and appointment on this form. I am aware of the reasons the information covered by my authorizations and consents is needed, and the benefits of, and the risks of not, authorizing/consenting. I authorize and consent to the Issuer collecting, using, and disclosing personal information concerning me for the purposes outlined in the Confidential Information File section. This authorization and consent is given in accordance with applicable law and without limiting the authorizations and consents given elsewhere in this application. My authorizations and consents will begin the date this application is signed and end when no longer required. My authorizations and consents may be revoked at any time by either written or electronic notification to the Issuer, subject to legal and contractual considerations. A reproduction of my authorizations and consents will be as valid as the original. If I cease to be eligible to participate in the plan, my tax-free savings account will be transferred to a new policy/plan number with the Issuer unless the Issuer receives other instructions from me, and I hereby appoint the Issuer as my agent for any related purpose.

Signature of holder

Date

  
 \_\_\_\_\_  
 President and Chief Executive Officer

  
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 President and Chief Operating Officer, Canada