



Member investment instructions

Return to Canada Life, Group Retirement Services

This form is to be used **only** where the employer/plan sponsor has given the member the right to make the investment decision on all or part of the contributions. This direction will be applicable to **all** contributions controlled by the member, unless otherwise directed in special instructions.

EMPLOYER/PLAN SPONSOR

Name of employer/plan sponsor	Policy/plan number
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MEMBER INFORMATION

Last name	Initial	First name	Certificate number
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IMPORTANT

- To advise us how to invest **new** contributions – complete **Part A**
- To change the direction of guaranteed investment funds at **maturity** – complete **Part B**
- To **transfer** assets between funds – complete **Part C**

The investment changes will apply to: RRSP RPP DPSP NRSP TFSA VRSP/PRPP All plans available

PART A – NEW CONTRIBUTIONS

Complete this section to change the investment of new contributions. Please refer to your Investment menu for fund names and identifiers available to you. Indicate fund(s) and percentage(s).

Percentage	Fund name and identifier	Percentage	Fund name and identifier	Percentage	Fund name and identifier
% to		% to		% to	
% to		% to		% to	
% to		% to		% to	

total allocation must equal 100%

PART B – MATURING GUARANTEED INVESTMENT FUNDS

Complete this section to change the direction of maturing guaranteed investment funds. Please refer to your Investment menu for fund names and identifiers available to you. Indicate fund(s) and percentage(s).

- Guaranteed investment funds may reinvest into any of the guaranteed or variable investment funds
- If you require additional space for the destination of reinvestments, please indicate in the special instructions area on page 2

	Percentage	Fund name and identifier
Funds maturing in _____ are to be reinvested as follows:	_____ % to	_____
	_____ % to	_____
	_____ % to	_____
	_____ % to	_____

total allocation must equal 100%

	Percentage	Fund name and identifier
Funds maturing in _____ are to be reinvested as follows:	_____ % to	_____
	_____ % to	_____
	_____ % to	_____
	_____ % to	_____

total allocation must equal 100%

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Member investment instructions (continued)

PART C – TRANSFER ASSETS BETWEEN FUNDS

Complete this section to transfer assets between funds. Please refer to your Investment menu for fund names and identifiers available to you. Indicate fund(s) and percentage(s).

- Transfer will be processed upon receipt of the Member investment instructions form by Canada Life
- For large transfers from or to an individual fund, there may be up to a 5 day delay in processing the transaction to allow the fund manager to liquidate assets for the transfer
- Transferring of guaranteed investments funds prior to maturity may result in values less than contributions plus interest

If you require additional space for the destination of transfers, please indicate in the special instructions area below.

Fund name and identifier	Percentage	Fund name and identifier	Percentage
From: _____	_____ %	To: _____	_____ %
		To: _____	_____ %
		To: _____	_____ %

total allocation must equal 100%

Fund name and identifier	Percentage	Fund name and identifier	Percentage
From: _____	_____ %	To: _____	_____ %
		To: _____	_____ %
		To: _____	_____ %

total allocation must equal 100%

Fund name and identifier	Percentage	Fund name and identifier	Percentage
From: _____	_____ %	To: _____	_____ %
		To: _____	_____ %
		To: _____	_____ %

total allocation must equal 100%

PART D – SPECIAL INSTRUCTIONS AND AUTHORIZATION

Special instructions:

I authorize the issuer to make the investment changes I have specified herein.

Signature of member Date