

# Absolute assignment (Transfer of Ownership) of non-registered GIC products

Sun Life Financial Trust Inc., Waterloo, Ontario



## Information about the current contractholder(s)

First name of contractholder	Middle initial	Last name	Policy number	Phone number — —
First name of joint contractholder (if applicable)	Middle initial	Last name		Phone number — —

I/we, the contractholder(s), absolutely transfer and assign all rights, title and interests in the above policy to:

## Information about the new contractholder(s) (individual)

First name of new contractholder	Middle initial	Last name	First name of new joint contractholder (if applicable)	Middle initial	Last name
Address (if different than the joint contractholder's), specify which one to use for correspondence			Address (if different than the joint contractholder's), specify which one to use for correspondence		
City		Province	City		Province
Country		Postal code	Country		Postal code
Social insurance number 		Date of birth (dd-mm-yyyy) — —	Social insurance number 		Date of birth (dd-mm-yyyy) — —
Relationship to current contractholder		Phone number — —	Relationship to current contractholder		Phone number — —

## Information about the new contractholder (corporation)

Corporate name		Address (street number and name)			
City		Province	Postal code	CRA (Canada Revenue Agency) business number	
Corporate registration number	Date of incorporation (dd-mm-yyyy) — —	Country of incorporation		Province of incorporation	

If the new ownership arrangement is joint, please answer the following questions:

1. Does this joint ownership require consent from all applicants before any changes are made? ☐ Yes ☐ No
2. Does this joint ownership include survivorship rights? ☐ Yes ☐ No

Taxation:

Any interest credited on the GIC contract prior to the date that ownership was transferred will be reported to the original owner(s).

Sign and date below:

Note: If a corporation is signing, its authorized officer must sign and indicate their title.

Date (dd-mm-yyyy) — —	Signed at city	Signed at province
Signature of current contractholder X	Signature of joint current contractholder X	
Signature of new contractholder X	Signature of new joint current contractholder X	

**Caution:** This form is provided by Sun Life Financial Trust Inc. for the convenience of its contractholders, who must satisfy themselves that it will carry out their intentions. Sun Life Financial Trust Inc. assumes no responsibility for the sufficiency or effect of the completed form.

Recorded and Filed at Sun Life Financial Trust Inc., Waterloo, Ontario

Have your advisor complete Identity verification, third party determination and politically exposed foreign person (PEFP) form E4105 and if the new contractholder is an entity, Certificate of Incumbency form E4207. We will not permit transactions by the new owner until we receive the completed forms.

Return to:

Sun Life Assurance Company of Canada  
227 King Street South  
P.O. Box 16-01, STN Waterloo  
Waterloo, ON N2J 4C5  
Fax number: 1-866-487-4745

E77-08-12

Please send fax or original.