

6852D

Policyholder / Account information

Date

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Product:

☐ Ideal Term Fund

☐ Ideal Segregated Fund

☐ Standard Life Mutual Fund

Contract/Account no.

Contractholder/Planholder name

Investment instructions (Standard Life Mutual Fund or Ideal Segregated Fund):

Fund name	Fund number	Amount (\$) or percent (%)	Sales charge % Front Load ¹ (only for Mutual Funds)

Joint Life Option

If the existing contract does not have the Joint Life Option and you wish to have it for the Ideal Income Series, you will need to provide a new application as a new contract will need to be created. (Please take note that this option is only available for non registered savings plan. The contract holder must be the annuitant)

Series Maturity Date

For the Ideal Income series, the Series Maturity Date is December 31st of the year the Annuitant turns 100 years of age (or younger spouse or common-law partner as defined by the Income Tax Act (Canada), if Joint Life Option).

Life Income Date (LID) (For the Ideal Income Series Only)

Life Income Date (LID) (For the Ideal Income Series Only)

Date

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If no date is selected, the following default Life Income Dates will apply:

- Registered retirement income plans: One year following the date of transfer from an RRSP or one year following the initial premium to the Ideal Income Series.
- Non-registered savings plans: Annuitant's 65th birthday
- Registered retirement savings plans: not applicable

I declare that I have received the information folder with all the necessary information pertaining to the Ideal Income Series.

Contractholder/Planholder signature

Investment instructions (Ideal Term Fund)

☐

Yes, I want to guarantee the rate (Rate Basis guarantee)

Term fund	Term (days, years or maturity date, ddmmyyyy)	Amount \$	Interest rate	Interest type C/S ²	Simple interest frequency (M,Q,S,A)	Paid to		
						DIA	Contractholder	
							Direct deposit	Cheque

Distributor (G.A.)/Dealer code

Advisor code

Advisor name (please print)

Advisor signature

Additional comments

Contractholder/Planholder signature

Date

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This signature and date is only required if you are requesting for a Rate Basis Guarantee

¹ Applicable to A-Series and T-Series only (Standard Life Mutual Funds only)

² Compound/Simple