

Trade made via FundSERV network:

 Check here

Agency code	Agent code	S.U.	Agent	Agent's telephone number	Extension
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contract no.	Annuitant's first and last name (in block letters)			FundSERV contract	
<input type="text"/>	<input type="text"/>			Dealer code	Intermediary code
<input type="text"/>	<input type="text"/>			<input type="text"/>	<input type="text"/>

1. SURRENDER INSTRUCTIONS⁽¹⁾
 a) TOTAL TRANSFER: For an intercontract transfer request, if the contract contains a loan, it will be reimbursed from investments in the contract.

 MAINTAIN PAC
 b) PARTIAL TRANSFER: \$ _____ SPECIFY⁽²⁾ → **GROSS (Default)** **NET**
 DAILY INTEREST FUND (DIF) (Not available in My Education+): _____ \$ OR %

 HIGH INTEREST ACCOUNT (My Education+ only): _____ \$ OR %

 ALL MATURED UNITS IN THE CONTRACT
 INVESTMENT FUNDS: Please indicate the exact instruction for each investment.

⚠ Important: If the withdrawal is made in the Guaranteed Surrender Series, Ecoflextra Series or the Income Stage of the FORLIFE Series, please read carefully section 5 - Signatures

Use the surrender calculator on the Extranet to complete this section	Fund no.	<input type="checkbox"/> % <input type="checkbox"/> \$ <input type="checkbox"/> Units	Order no. (FundSERV)	Indicate a fund number for the balance, should it be necessary: Fund no.: _____	
The total cash amount or percentage must equal 100% of the requested amount					

 GUARANTEED INTEREST FUND (GIF)

Please indicate the exact instruction for each investment.

Deposit date	Amount of deposit	Amount to be surrendered (Select one)	Time of surrender (Except lifetime investment)
Y Y Y Y M M D D	\$ _____	<input type="checkbox"/> Total <input type="checkbox"/> Interest <input type="checkbox"/> \$ _____	<input type="checkbox"/> Before maturity <input type="checkbox"/> At maturity
Y Y Y Y M M D D	\$ _____	<input type="checkbox"/> Total <input type="checkbox"/> Interest <input type="checkbox"/> \$ _____	<input type="checkbox"/> Before maturity <input type="checkbox"/> At maturity
Y Y Y Y M M D D	\$ _____	<input type="checkbox"/> Total <input type="checkbox"/> Interest <input type="checkbox"/> \$ _____	<input type="checkbox"/> Before maturity <input type="checkbox"/> At maturity

⁽¹⁾ Surrender fees apply.

⁽²⁾ GROSS = before fees and taxes, NET = after fees and taxes.

COMPLETE PAGE 2 FOR INVESTMENT INSTRUCTIONS AND REQUIRED SIGNATURES.


AUTHORIZED TRANSFERS – For the same type of registration¹

Originating contract	Destination contract and series	Allowed	Type of fees allowed	Required signature
Ecoflex	→ Ecoflex	No	N/A	N/A
	→ Ecoflex ^{extra} : Classic Series 75/75	Yes	FEL at 0%	Client or Agent with LTA
	→ Ecoflex ^{extra} : Guaranteed Surrender Series	No	N/A	N/A
Ecoflex	→ IAG SRP: Classic Series 75/75, Series 75/100, Prestige Series or FORLIFE Series ²	Yes	FEL at 0%	Client or Agent with LTA
	→ IAG SRP: Ecoflex Series 100/100 or Ecoflex ^{extra} Series 75/100	No	N/A	N/A
Ecoflex ^{extra} ³ or IAG SRP issued before November 24, 2014	→ IAG SRP: Classic Series 75/75, Series 75/100, Prestige Series, Ecoflex Series 100/100 or FORLIFE Series ²	Yes	FEL at 0%	Client or Agent with LTA
	→ IAG SRP: Ecoflex ^{extra} Series 75/100	No	N/A	N/A
My Education	→ My Education+	Yes	FEL at 0%	Client or Agent with LTA

¹ The following rules apply only for intercontract transfers without a change of registration.

³ For the Guaranteed Surrender Series, total transfer is mandatory; no partial transfer is permitted.

² The FORLIFE Series is only available for IAG SRP contracts issued after November 24, 2014.

2. INVESTMENT INSTRUCTIONS

- A) New contract (Attach new application):** NP _____
- B) Within same contract OR Transfer to contract no.** _____ (Complete this page.)
- C) Loan reimbursement for contract no.** _____

- DAILY INTEREST FUND (DIF) (Not available in My Education+):** \$ OR % _____ The amounts deposited in the DIF will be invested according to the AIT (Automatic Investment Term), if applicable.
- HIGH INTEREST ACCOUNT (My Education+ only):** \$ OR % _____
- GUARANTEED INTEREST FUND (GIF) →** Type of interest: Simple OR Compound (Default)
- 1 month (\$ or %) _____ _____ years (\$ or %) _____ _____ years (\$ or %) _____

INVESTMENT FUND

If this is the first purchase of funds in an Ecoflex contract or the Ecoflex Series: - Complete GUARANTEE MATURITY DATE section.
- Attach the investor profile(s).

Fund codes must correspond to products, series, funds and fee types listed under AUTHORIZED TRANSACTIONS above.

Ecoflex: Funds with 3 or 4 digits	IAG SRP: funds with 5 digits beginning with: 3 for the Series 75/100 and the Series 75/100 Prestige
Ecoflex^{extra}: Funds with 5 digits beginning with: 1 for the Classic Series 75/75	4 for the Classic Series 75/75 and the Classic Series 75/75 Prestige 5 for the Ecoflex Series 100/100 7 for the FORLIFE Series (for contracts opened after Nov. 24, 2014)
	My Education+: funds with 5 digits beginning with: 4 for the Classic Series 75/75 and the Classic Series 75/75 Prestige

	Fund no.	<input type="checkbox"/> % or <input type="checkbox"/> \$	Order no.
1.			
2.			
3.			
4.			
5.			
6.			

The total amount or percentage must equal 100% of premiums paid into investment funds.

PRODUCT	THE LAST DIGIT REFERS TO THE SALES CHARGE				
	Deferred Sales Charge (Withdrawal fees apply) <i>DSC</i>	No Sales Charge <i>CB, 3 years</i>	No Sales Charge <i>CB, 5 years</i>	Front-End Load (No withdrawal fees) <i>FEL</i>	No Load <i>NL</i>
Ecoflex	0 or 5	1 or 6			2 or 7
Ecoflex ^{extra}	0	1	3	5	
IAG SRP & My Education+	0	1	3	5	
↳ Prestige Series ↴	7	2	4	6	

PRESTIGE SERIES: The total market value of the Applicant's contract(s) must be \$300,000+. Certain conditions apply.

3. GUARANTEE MATURITY DATE

Guarantee maturity date

Y	Y	Y	Y	M	M	D	D

IMPORTANT: Complete only if this is the first purchase of funds in an Ecoflex contract (issued since January 1, 1993) or in the Ecoflex Series 100/100 for an IAG SRP contract.

4. SPECIAL INSTRUCTIONS

5. SIGNATURES (MANDATORY)

I request that the transactions indicated above be carried out in accordance with the rights, conditions and stipulations of the contract.

- If fund units are credited to this contract for the first time: I confirm that I have completed electronic investor profile no. _____ (to be included with the application) or a paper profile (to be included with the application) with my agent, and I acknowledge receipt of the *Information Folder* describing the characteristics of my contract and the *Fund Facts* booklet.
- My Education+ contract opened online at ia.ca: I acknowledge receipt of the of the My Education+ Contract, of the Information Folder in which the key characteristics of the Contract are described, of the Fund Facts booklet and of the My Education+ Plan which replaces the My Education+ Contract and the My Education+ Plan that I received electronically.

! I confirm that if the withdrawal is made from the Guaranteed Surrender Series, Ecoflex^{extra} Series or the Income Stage of the FORLIFE Series funds and the total of annual withdrawals in these series is greater than the GSA, LSA or FORLIFE Income, a downward adjustment will be made.

X _____
Applicant / Assignee / Subscriber

X _____
Irrevocable beneficiary

X _____
Agent

X _____
Co-applicant / Joint subscriber

Y	Y	Y	Y	M	M	D	D

Date

IMPORTANT: If this document is sent by fax, KEEP THE ORIGINAL FOR YOUR RECORDS.