

Trade made by FundSERV network:  **Check here**  Trade made by Extranet/Web:  **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

**1.  INTER-FUND TRANSFER       TOTAL FUND ACCOUNT BALANCE TO DESTINATION # 1**

SOURCE OF FUNDS				DESTINATION OF FUNDS					
Fund no.	<input type="checkbox"/> %, <input type="checkbox"/> \$ or <input type="checkbox"/> Units	Order no.		Fund no.	<input type="checkbox"/> %, <input type="checkbox"/> \$ or <input type="checkbox"/> Units	Fund no.	<input type="checkbox"/> %, <input type="checkbox"/> \$ or <input type="checkbox"/> Units	Fund no.	<input type="checkbox"/> %, <input type="checkbox"/> \$ or <input type="checkbox"/> Units
1.			<b>Complete</b> →						
2.	<input type="checkbox"/> Check if same destination as #1		<b>Complete</b> →						
3.	<input type="checkbox"/> Check if same destination as #1		<b>Complete</b> →						
4.	<input type="checkbox"/> Check if same destination as #1		<b>Complete</b> →						
5.	<input type="checkbox"/> Check if same destination as #1		<b>Complete</b> →						
6.	<input type="checkbox"/> Check if same destination as #1		<b>Complete</b> →						
7.	<input type="checkbox"/> Check if same destination as #1		<b>Complete</b> →						
8.	<input type="checkbox"/> Check if same destination as #1		<b>Complete</b> →						
9.	<input type="checkbox"/> Check if same destination as #1		<b>Complete</b> →						
10.	<input type="checkbox"/> Check if same destination as #1		<b>Complete</b> →						

**! ATTENTION**

- The total percentage of the "Destination of Funds" must equal 100%.
- Reminder: series and fees →

**NOTE**

- Inter-series transfers with a destination of Guaranteed Surrender Series or Ecoflextra Series 75/100 are not permitted.
- **PRESTIGE SERIES:** The total market value of the Applicant's contract(s) must be \$300,000+. Certain conditions apply.

<p><b>Ecoflex:</b> Funds with 3 or 4 digits</p> <p><b>Ecoflextra:</b> Funds with 5 digits beginning with: 1 for the Classic Series 75/75</p>	<p><b>IAG SRP:</b> funds with 5 digits beginning with: 3 for the Series 75/100 and the Series 75/100 Prestige 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)</p> <p><b>My Education+:</b> funds with 5 digits beginning with: 4 for the Classic Series 75/75 and the Classic Series 75/75 Prestige</p>
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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
Ecoflextra	0	1	3	5	
IAG SRP & My Education+	0	1	3	5	
↳ Prestige Series ↵	7	2	4	6	

**2.  SIGNATURES**

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

<b>X</b> _____	<b>X</b> _____	<b>X</b> _____	Y Y Y Y M M D D <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Applicant / Assignee / Subscriber	Co-applicant / Joint subscriber	Agent	Date

**IMPORTANT: If document is faxed for processing, KEEP THE ORIGINAL FOR YOUR RECORDS.**



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Contract no. Annuitant's first and last name (in block letters) FundSERV contract  
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**3.  ECOFLEXTRA CONTRACT – NO-FEE TRANSFER OF 10% OF THE AMOUNT FROM A DEFERRED SALES CHARGE (DSC) FUND TO THE CORRESPONDING FRONT-END LOAD (FEL) FUND IN THE SAME SERIES**

**NOT AVAILABLE FOR IAG SAVINGS AND RETIREMENT PLAN**

**! IMPORTANT**  
Destination funds must be the same as the source funds

	Fund no.	<input type="checkbox"/> %, <input type="checkbox"/> \$ or <input type="checkbox"/> Units		Fund no.	<input type="checkbox"/> %, <input type="checkbox"/> \$ or <input type="checkbox"/> Units
1.		0	4.		0
2.		0	5.		0
3.		0	6.		0

**4.  TOTAL INTER-SERIES SWITCH TO THE SAME FUNDS DESTINATION OR TO THE FORLIFE SERIES INCOME STAGE**

SOURCE SERIES		DESTINATION SERIES	REQUIRED SIGNATURE
For Ecoflextra contracts <input type="checkbox"/> Total Guaranteed Surrender Series (GSS) balance <sup>1</sup>	<b>➔</b>	<input type="checkbox"/> To the Classic Series 75/75	Client (mandatory)
For IAG Savings and Retirement Plan contracts <input type="checkbox"/> Total Classic Series 75/75 balance <sup>2</sup> <input type="checkbox"/> Total Classic Series 75/75 <b>Prestige</b> balance <input type="checkbox"/> Total Series 75/100 balance <sup>2</sup> <input type="checkbox"/> Total Series 75/100 <b>Prestige</b> balance <input type="checkbox"/> Total Ecoflex Series 100/100 balance <sup>2</sup> <input type="checkbox"/> Total Ecoflextra Series 75/100 balance <sup>1</sup> <input type="checkbox"/> Total FORLIFE Series Savings Stage balance <sup>2</sup>	<b>➔</b>	Select new series <input type="checkbox"/> To the Classic Series 75/75 <input type="checkbox"/> To the Classic Series 75/75 <b>Prestige</b> <input type="checkbox"/> To the Series 75/100 <input type="checkbox"/> To the Series 75/100 <b>Prestige</b> <input type="checkbox"/> To the Ecoflex Series 100/100 <input type="checkbox"/> To the FORLIFE Series Savings Stage <sup>3</sup> <input type="checkbox"/> To the FORLIFE Series Income Stage <sup>3</sup> Specify fund: <input type="checkbox"/> FORLIFE Guaranteed Maximum Income <input type="checkbox"/> FORLIFE Guaranteed Income & Growth	Client or Agent with Limited Trading Authorization (LTA)

<sup>1</sup> For the GSS and Ecoflextra Series 75/100, total transfer is mandatory; no partial transfer is permitted. <sup>2</sup> For a partial inter-series switch, complete Part 1. <sup>3</sup> Only available for contracts issued after November 24, 2014. See note on page 1 for more details.

**5.  SPECIAL INSTRUCTIONS**

Apply new destination as:

**! IMPORTANT**  
• Only for transfers to the same destination – must total 100%.  
• The AIT is not available for: The Income Stage funds of the FORLIFE Series My Education+ contracts

- Automatic Investment Term (AIT) Instruction Change
- PAC  Daily Interest Fund (DIF)
- Automatic Withdrawal Term (AWT) Instruction Change

If the investments selected do not reflect those recommended based on the investor profile in effect, please state the reasons why:

Other: \_\_\_\_\_

**6.  SIGNATURES**

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

If the requested transaction is an inter-series switch from the FORLIFE Series, the Ecoflextra Series or the Guaranteed Surrender Series to another series in the same contract, I am aware that the conditions regarding the guarantees will be modified as per the rules of the new series.

**X** \_\_\_\_\_ **X** \_\_\_\_\_ **X** \_\_\_\_\_

Applicant / Assignee / Subscriber Co-applicant / Joint subscriber Agent

Date 

Y	Y	Y	Y	M	M	D	D

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