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iA Financial Group

REQUEST FOR SURRENDER PAID TO CLIENT
INDIVIDUAL SAVINGS AND RETIREMENT

F51-153A-2

Trade made via FundSERV network:
Check here ☐

Agency code	Agent code	S.U.	Agent	Agent's telephone number	Extension

Contract no.	Annuitant's first and last name (in block letters)	FundSERV contract: Dealer code	FundSERV contract: Intermediary code

Important: If there is an attached loan, it must be reimbursed.

1. ☐ TOTAL SURRENDER

☐ **TOTAL –** If the contract contains a loan, it will be reimbursed from investments in the contract. ☐ **MAINTAIN PAC**

2. ☐ PARTIAL SURRENDER

☐ **10% free amount only** (Surrender instructions mandatory)

☐ **All matured units in the contract**

If both boxes are checked, all no-fee money will be withdrawn. Surrender instructions are mandatory for the 10% free amount.

AMOUNT (Min. $100): $_____ ☐ **GROSS (Default)** (GROSS = before fees and taxes)

or ☐ **NET** (NET = after fees and taxes)

Where applicable, the surrender amount must cover the loan balance. Please specify whether the amount requested is:

☐ **Before loan reimbursement** ☐ **After loan reimbursement** (Surrender instructions in % only) ☐ **For loan reimbursement only**

SURRENDER INSTRUCTIONS

☐ **Daily interest fund (DIF): $**_____ **or** _____ **%**

☐ **Investment funds** (Complete the table below)

NOTES:
- Use the surrender calculator on the Extranet to complete this section
- The total cash amount or percentage must equal 100% of the requested amount

Fund no.	☐ % ☐ $ ☐ Units	Order no. (FundSERV)

Indicate a fund number for the balance, should it be necessary:

Fund no.: _____

☐ **Guaranteed interest fund (GIF)** (For GIF, Gross = requested amount increase with the interest before fees and taxes, NET = after fees and taxes)

Deposit date (Y Y Y Y M M D D)	Amount of deposit	Amount to be surrendered	Time of surrender
	$_____	☐ Total ☐ Interest ☐ $_____	☐ Before maturity ☐ At maturity
	$_____	☐ Total ☐ Interest ☐ $_____	☐ Before maturity ☐ At maturity

3. ☐ PAYMENT METHOD

Direct deposit – Void personal cheque:

☐ **ATTACHED** to this request (Attach void personal cheque in the contract owner's name.).

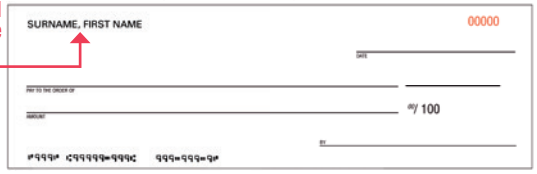
☐ **ON FILE** to contract number:_____.

MANDATORY (Individual Savings Contract) You must indicate the contract for which you have previously provided a void personal cheque. (If the reference number is incorrect, if the cheque is not a personal cheque or not on file, payment will be made by cheque.)

☐ **Cheque** (default)

Client name must be pre-printed on the cheque

Example of valid void personal cheque



4. ☐ SPECIAL INSTRUCTIONS

5. ☐ SIGNATURES

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

I confirm that if the withdrawal is made in the Guaranteed Surrender Series, Ecoflextra 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 or assignee

X_____ Agent

Y Y Y Y M M D D
Date

X_____ Irrevocable beneficiary

X_____ Co-applicant

It is required under certain legislation that we advise you that your claim is governed by a limitation period that is set out in *the Insurance Act* or other applicable provincial legislation.

F51-153A-2(16-04)

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