Member investment instructions

Return to Canada Life, Group Retirement Services
255 Dufferin Avenue, T540, London, ON N6A 4K1

This form is to be used **only** where the employer/plan sponsor has given the member the right to make the investment decision on all or part of the contributions.

EMPLOYER/PLAN SPONSOR

Name of employer/Plan Sponsor	Policy/Plan number
ARCHDIOCESE OF VANCOUVER	**35169**

MEMBER INFORMATION

Last name	Initial	First name	Certificate number

IMPORTANT

- To advise us how to invest **new** contributions – complete **Part A**
- To change the direction of guaranteed investment funds at **maturity –** complete **Part B**
- To **transfer** assets between funds – complete **Part C**

The investment changes will apply to All contributions; Employer contributions (if applicable), Member contributions under:
☐ RRSP ☐ RPP ☐ TFSA

PART A – NEW CONTRIBUTIONS

Complete this section to change the investment of new contributions. Please refer to your Investment menu for fund names and identifiers available to you. Indicate fund(s) and percentage(s).

Percentage	Fund name and identifier	Percentage	Fund name and identifier	Percentage	Fund name and identifier
% to		% to		% to	
% to		% to		% to	
% to		% to		% to	

total allocation must equal 100%

PART B – MATURING GUARANTEED INVESTMENT FUNDS

Complete this section to change the direction of maturing guaranteed investment funds. Please refer to your Investment menu for fund names and identifiers available to you. Indicate fund(s) and percentage(s).

- Guaranteed investment funds may reinvest into any of the guaranteed or variable investment funds
- If you require additional space for the destination of reinvestments, please indicate in the special instructions area on page 2

	Percentage		Fund name and identifier
Funds maturing in ________ are to be reinvested as follows:	________	% to	________
	________	% to	________
	________	% to	________
		% to	

total allocation must equal 100%

	Percentage		Fund name and identifier
Funds maturing in ________ are to be reinvested as follows:	________	% to	________
	________	% to	________
	________	% to	________
		% to	

total allocation must equal 100%

Contact information 1-800-724-3402 or mycanadalifeatwork.com

PART C – TRANSFER ASSETS BETWEEN FUNDS

Complete this section to transfer assets between funds. Please refer to your Investment menu for fund names and identifiers available to you. Indicate fund(s) and percentage(s).

- Transfer will be processed upon receipt of the Member investment instructions form by Canada Life
- For large transfers from or to an individual fund, there may be up to a 5 day delay in processing the transaction to allow the fund manager to liquidate assets for the transfer
- Transferring of guaranteed investments funds prior to maturity may result in values less than contributions plus interest

If you require additional space for the destination of transfers, please indicate in the special instructions area below.

	Fund name and identifier	Percentage		Fund name and identifier	Percentage
From:	______________	________%	To:	______________	________%
			To:	______________	________%
			To:	______________	________%

total allocation must equal 100%

	Fund name and identifier	Percentage		Fund name and identifier	Percentage
From:	______________	________%	To:	______________	________%
			To:	______________	________%
			To:	______________	________%

total allocation must equal 100%

	Fund name and identifier	Percentage		Fund name and identifier	Percentage
From:	______________	________%	To:	______________	________%
			To:	______________	________%
			To:	______________	________%

total allocation must equal 100%

PART D – SPECIAL INSTRUCTIONS

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PART E – PRIVACY

Protecting your personal information

At Canada Life, we're committed to protecting personal information and respecting your privacy. Personal information is information that either on its own or combined with other information allows an individual to be identified. This includes your name and address, as well as more sensitive information such as your health and financial records. When applicable, this includes information about other people such as your spouse and children.

How we use your personal information

Your personal information is used to provide you with products and services and to improve our business operations. This includes verifying your identity, maintaining your profile, and informing you about features of the products you already have with us. It's also used to provide you with advice, evaluate your eligibility for products, price our products, collect feedback on our customer service, process claims and other financial transactions, protect you and us from risks such as cyber threats and fraud, and comply with legal obligations. If you provided your social insurance number (SIN), we'll use it for tax reporting. Your SIN is also used to link your products together and to keep your information separate from other customers with similar names.

Contact information 1-800-724-3402 or mycanadalifeatwork.com

Member investment instructions (continued)

PART E – PRIVACY (continued)

Who we share personal information with

We share your personal information with other people and organizations who help us administer your products and provide you with services. This may include your advisor or people who work with your advisor, our Canadian subsidiaries, and other organizations that provide us services such as other financial institutions, technology suppliers, and credit reporting agencies. As part of our day-to-day business, your personal information may be communicated to government departments and agencies, and may be communicated outside your province of residence or outside Canada. We take protecting your personal information seriously and we'll never sell your personal information to anyone.

You're in control of your personal information

We respect your privacy preferences and follow them when using your personal information. At any point in your relationship with us, you can choose how your personal information is used by updating your privacy preferences through your online account or by submitting a request through our privacy centre at canadalife.com/privacy. This includes choosing whether you receive customer experience surveys, the use of your SIN for non-tax reporting purposes, and whether and how you want to receive information and offers from Canada Life using the personal information we collect from you throughout your relationship with us. You can also exercise other privacy rights through our privacy centre such as access to or correction of your personal information. If you choose to remove your consent to the collection, use and disclosure of the personal information required to serve you and meet our legal obligations, we may not be able to continue to provide you with products and services.

Want to learn more? Please visit canadalife.com/privacy.

PART F – SIGNATURE

I understand that my personal information will be collected, used and shared as set out above.

I authorize Canada Life to proceed with my request as outlined in this form.

Signature of member Date

Clear

Print

Contact information 1-800-724-3402 or mycanadalifeatwork.com