



Lump sum contribution to a group retirement plan

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



Archdiocese
of Vancouver

To be completed by a plan member/contributor who is making a voluntary lump sum contribution to a group retirement plan.

Please note that your plan must allow you to make additional lump sum contributions.

EMPLOYER/PLAN SPONSOR

Name of employer/Plan Sponsor

ARCHDIOCESE OF VANCOUVER

Policy/Plan number

35169

CONTRIBUTION MADE BY:

Last name

Middle Initial

First name

Certificate number

I am attaching a cheque (payable to Canada Life) in the amount of \$_____ to be deposited as follows:

- ☐ To my Registered Retirement Savings Plan, as a personal contribution for myself.
- ☐ To my Registered Retirement Savings Plan, as a contribution for my spouse (I am the spousal contributor).
My spouse's certificate number is _____.
- ☐ To my Registered Pension Plan, as a voluntary contribution.

Please invest this contribution as follows:

- ☐ According to my (or my spouse's) current investment allocation instructions.
- ☐ According to the following special instructions for this contribution only:

Percentage	Name of fund / identifier	Percentage	Name of fund / identifier
% to		% to	
% to		% to	
% to		% to	

Total allocation must equal 100%. Note that in some cases your plan sponsor controls investment allocation instructions.

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

Canada Life and design, and My Canada Life at Work are trademarks of The Canada Life Assurance Company.

Lump sum contribution to a group retirement plan (continued)

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.

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 person contributing

Date

Signature of spouse*

Date

*Only required if contributions are directed to a spouse, *and* special investment instructions apply.

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

Canada Life and design, and My Canada Life at Work are trademarks of The Canada Life Assurance Company.