Tax-Free Savings Account
Enrolment Form for Employee/Member
For Applicants in all Provinces Except Quebec

Group Savings & Retirement
PO Box 11464,
succ. Centre-ville
Montreal QC H3C 5M3

Telephone: 1-800-242-1704

Fax: 514-499-4480

Please note:
The Standard Life Assurance Company of Canada (Standard Life Canada) requires the completed original enrolment forms at all times to promptly invest funds.

The employee/member is the holder under the plan.

To transfer funds tax-free to this plan, Call 1-800-242-1704

Shaded areas to be completed by the plan sponsor prior to submitting the Enrolment Form to us.

By signing

I apply to participate in the tax-free savings account of my Employer/Association and agree to be bound by the terms of the plan and any administrative rules established by the plan sponsor.

I authorize the following:

- the deduction of the appropriate contribution from my pay, if applicable;
- the plan sponsor (my Employer/Association) to act as my agent in contracting for benefits under the plan;
- Standard Life Canada to file an election to register my plan as a tax-free savings account under section 146.2 of the *Income Tax Act* (Canada) and any other Provincial *Income Tax Act*, if applicable; and
- the plan sponsor, my Employer/Association, Standard Life Canada, its affiliates and outsourcing partners, any successor issuer, third party administrators, my financial institution(s) and any authorized market intermediary involved in the sale or administration of the plan or any other plan to which my rights and benefits may be transferred, to exchange my personal information (including banking information) when required as a result of their involvement.

I understand that the personal information collected will be kept strictly confidential and will only be used, exchanged and retained for the purpose of this plan. I certify that the information given is true, correct and complete, to the best of my knowledge.

Client No.: RS74934 **Client Name: ETFO / OSSTF**

Plan Sponsor Authorization (Your Employer/Association)

Date of employment (yyyy/mm/dd) **Date joined plan** (yyyy/mm/dd) **Certificate No.:**

Sub-group name **Sub-group number** **Class**

Signature X **(print)** **Date (yyyy/mm/dd)**

Step 1 – Holder Information

Last Name First Name Initial

Date of birth (yyyy/mm/dd) Marital status Social insurance number (required by law for income-reporting purposes)

E-mail address

Home address City

Province Postal code (Work) Area code & phone number – (Home) Area code & phone number –

Sex ☐ Male ☐ Female Language ☐ English ☐ French

Step 2 – Beneficiary Information

In the event of my death, I designate the following person(s) to be the beneficiary(ies) of any amount due under my plan on or after my death in accordance with the terms of the plan in which I have an interest:

☐ my estate

OR ☐ the following beneficiary(ies)

Last name	First name	Date of birth	Relationship	Entitlement (%)

Must total 100%

If your designated beneficiary dies before you, we will pay the benefits from your plan to any surviving beneficiary or, if none, or if no designation is made, to your estate. Any beneficiary designation is revocable.

Appointment of trustee (for provinces other than Quebec)

In the event my beneficiary is a minor at the time the death benefit is payable, I appoint the following person as trustee to receive such funds on behalf of the beneficiary, to hold these funds until my beneficiary attains the majority age and to give a valid discharge to Standard Life Canada for such payment:

First name ______________________ Last name ______________________

Address ______________________

Phone number ( ) – ( ) –
(Work) Area code & phone number (Home) Area code & phone number

Step 3 – Payroll Deduction Request

Please deduct $ ___________ or ___________ % from each pay, to be invested in this plan.

Step 4 – Signature

Holder Signature (mandatory) X **(print)** **Date (yyyy/mm/dd)**

Please complete your investment instructions on the back of this page.

Step 5 - Investment Instructions

Before completing your investment instructions, we suggest you consult your enrolment guide, or call Standard Life at 1-800-242-1704 to discuss your investment strategy.

Please make your investment mix selection from either **OPTION 1 or OPTION 2**, as desired. **Please select only one option.**

The following investment mixes vary based on different investor profiles. Your investment strategy should be based on your overall financial situation. These investment instructions apply to all future deposits and lump sum deposits until alternate investment instructions are provided.

Option 1: Pick a sample mix:

Investment period	Conservative	Moderate	Aggressive
More than 25 years	☐ 30% Canadian Equity SLI* 30% Bond SLI* 30% SL of Canada - 5 Year CIA 10% US Equity SLI*	☐ 30% Canadian Equity SLI* 35% Bond SLI* 10% SL of Canada - 5 Year CIA 13% US Equity SLI* 12% International Equity SLI*	☐ 45% Canadian Equity SLI* 25% Bond SLI* 15% US Equity SLI* 15% International Equity SLI*
Between 10 and 25 years	☐ 25% Canadian Equity SLI* 25% Bond SLI* 40% SL of Canada - 5 Year CIA 10% US Equity SLI*	☐ 25% Canadian Equity SLI* 30% Bond SLI* 20% SL of Canada - 5 Year CIA 13% US Equity SLI* 12% International Equity SLI*	☐ 35% Canadian Equity SLI* 35% Bond SLI* 15% US Equity SLI* 15% International Equity SLI*
Less than 10 years	☐ 20% Canadian Equity SLI* 20% Bond SLI* 50% SL of Canada - 5 Year CIA 10% US Equity SLI*	☐ 20% Canadian Equity SLI* 25% Bond SLI* 30% SL of Canada - 5 Year CIA 13% US Equity SLI* 12% International Equity SLI*	☐ 30% Canadian Equity SLI* 45% Bond SLI* 13% US Equity SLI* 12% International Equity SLI*

If you plan to retire within the next 3 years, we suggest that you consult with your financial advisor.

Option 2: Provide your own instructions:

Code	Fund Name	Fund Manager
Guaranteed Funds		
CIA1	One year compound interest accumulator	SL of Canada
CIA2	Two year compound interest accumulator	SL of Canada
CIA3	Three year compound interest accumulator	SL of Canada
CIA4	Four year compound interest accumulator	SL of Canada
CIA5	Five year compound interest accumulator	SL of Canada
DIA	Daily interest accumulator	SL of Canada
Fixed Income Funds		
MONE	Money Market	SL Investments*
BOND	Bond	SL Investments*
MORT	Mortgage	SL of Canada
Balanced/Diversified Funds		
DVSF1	Balanced	Invesco Trimark
DVSTP	Diversified Tri-Plan	SL Investments*
DVSF2	Balanced	McLean Budden

Code	Fund Name	Fund Manager
Equity Funds		
EQTY	Canadian Equity	SL Investments*
GREQ	Canadian Equity	Invesco Trimark
EQTTP	Equity Tri-Plan	SL Investments*
LCAP	Canadian Equity	McLean Budden
MICAP	Canadian Equity	Bissett
SMCAP	Canadian Small-Cap Equity	SL Investments*
USEQ	US Equity	SL Investments*
USVG	US Equity	GE Asset Management
INEQ	International Equity	SL Investments*
EMERG	Emerging Markets	Schroders
GLEQ1	Global Equity	Invesco Trimark
GLEQ2	Global Equity	Templeton
Specialty Funds		
REAL	Real Estate	SL Investments Real Estate

Investment mix for future deposits

Code	Fund name	
		%
		%
		%
		%
		%

Must total 100%

* SL = Standard Life

Step 6 – Signature

I understand that the personal information collected will be kept strictly confidential and will only be used, exchanged and retained for the purpose of this plan. I certify that the information given is true, correct and complete, to the best of my knowledge.

Holder Signature (mandatory) **(print)** **Date (yyyy/mm/dd)**

X

Important Notes

A. If your investment instructions are incomplete, contributions will be invested in the default fund selected by your Plan Sponsor.

B. Please note we (Standard Life Canada) neither suggest nor recommend any investment approach or fund in particular, whether it is a sample investment mix or a personal investment selection. Market-related funds are not guaranteed and the value of a member's units will vary according to market conditions and the success of the funds' manager. We are not responsible for the returns of the selected investments. Furthermore, the selection of a sample investment mix is no promise or guarantee, explicit or implied, that selected investments will generate a satisfactory retirement income.

C. Compound Interest Accumulator Funds will automatically reinvest upon maturity for the same term originally requested unless Standard Life is advised by calling 1-800-242-1704. Withdrawal from guaranteed funds before maturity may be subject to a market value adjustment.

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