



## 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. This direction will be applicable to **all** contributions controlled by the member, unless otherwise directed in special instructions.

| EMPLOYER/PLAN SPONSOR                                |                    |
|--|--------------------|
| Name of employer/plan sponsor<br><br><b>NextStep</b> | Policy/plan number |

| 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:  RRSP  NRSP  TFSA  All plans available

### 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 [grsaccess.com](http://grsaccess.com)  
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**Member investment instructions (continued)**

**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 AND AUTHORIZATION**

**Special instructions:**

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I authorize the issuer to make the investment changes I have specified herein.

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Signature of member \_\_\_\_\_ Date \_\_\_\_\_