



## Lump sum contribution to a non-registered savings plan

Return to Canada Life, Group Retirement Services

255 Dufferin Avenue, T540, London, ON N6A 4K1

To be completed by a plan member who is making a lump sum contribution to a non-registered savings plan.

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

### EMPLOYER/PLAN SPONSOR

Name of employer/plan sponsor

Policy/plan number

*NextStep*

### 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 to my non-registered savings plan.

### IMPORTANT information regarding non-registered contributions:

**IDENTIFICATION REQUIREMENT – If you enrolled in this plan on or after June 23, 2008 you must complete a Personal identification process before a lump sum contribution can be accepted.** A Personal identification package can be obtained by accessing our website at [grsaccess.com](http://grsaccess.com) or by calling us at 1-800-724-3402. Your enrolment date can be found on your member statement, referenced as *Date you joined this plan* or by signing on to [grsaccess.com](http://grsaccess.com), referenced as *Your date of membership*.

### CONTRIBUTIONS OF \$100,000 or greater:

Anti-money laundering legislation requires that for lump sum contributions of \$100,000 or greater, a *Politically Exposed Person Determination* form be completed. Your contribution will not be applied without this form. The form can be obtained by visiting [grsaccess.com](http://grsaccess.com) or calling us at 1-800-724-3402.

Please invest this contribution as follows:

☐ According to my 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.**

Signature of member

Date

Contact information 1-800-724-3402 or [grsaccess.com](http://grsaccess.com)  
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