



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 NextStep	Policy/plan number
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CONTRIBUTION MADE BY:

Last name	Middle Initial	First name	Certificate number
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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 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, 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 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
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