

## Member investment instructions

Return to Great-West Life, Group Retirement Services

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.

Services for this plan are provided by The Great-West Life Assurance Company (Great-West). The policy is issued by London Life Insurance Company, a subsidiary of Great-West.

### EMPLOYER/PLAN SPONSOR INFORMATION

Name of employer/plan sponsor	Policy/plan number
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### MEMBER INFORMATION (please print)

Last name	Initial	First name	Certificate / Social insurance number
Business telephone number ( ) - Ext.			Home telephone 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 ( ) RPP ( ) DPSP ( ) 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	Name of fund / identifier	Percentage	Name of fund / identifier	Percentage	Name of fund / 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 or identifier
Funds maturing in _____ are to be reinvested as follows:	_____ % to	_____
	_____ % to	_____
	_____ % to	_____
	_____ % to	_____

*total allocation must equal 100%*

	Percentage	Fund name or identifier
Funds maturing in _____ are to be reinvested as follows:	_____ % to	_____
	_____ % to	_____
	_____ % to	_____
	_____ % to	_____

*total allocation must equal 100%*

**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 Great-West
  - 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 or identifier	Percentage	Fund name or identifier	Percentage
From: _____	_____ %	To: _____	_____ %
		To: _____	_____ %
		To: _____	_____ %
<i>total allocation must equal 100%</i>			

Fund name or identifier	Percentage	Fund name or identifier	Percentage
From: _____	_____ %	To: _____	_____ %
		To: _____	_____ %
		To: _____	_____ %
<i>total allocation must equal 100%</i>			

Fund name or identifier	Percentage	Fund name or identifier	Percentage
From: _____	_____ %	To: _____	_____ %
		To: _____	_____ %
		To: _____	_____ %
<i>total allocation must equal 100%</i>			

**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.

Date \_\_\_\_\_ Member's signature \_\_\_\_\_