

Language preference English French

Policy/plan number _____ (to be completed by issuer)

Issuer: London Life Insurance Company

Please print

POLICY PROVISIONS

SECTION 1 - APPLICANT INFORMATION

Applicant's name (applicant is the plan sponsor/policyholder)

Please indicate **full legal name**.

- Corporation
- Partnership
- Sole proprietorship
- Other:

Address of applicant (include street address, city, province and postal code)

Telephone number () - Ext.	Fax number () -	E-mail address
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SECTION 2 - PLAN ADMINISTRATOR INFORMATION

Same as above, or, administrator's name:

Address of administrator (include street address, city, province and postal code)

Telephone number () - Ext.	Fax number () -	Internet address
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SECTION 3 - POLICY DETAILS

Effective date of the policy: _____ yyyy mm dd	Renewal date of the policy: The first day of _____ (month)	Effective date of the amendment (if applicable): _____ yyyy mm dd
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SECTION 4 - PLAN DETAILS

<input type="checkbox"/> RPP	Plan name:	Registration number(s):
<input type="checkbox"/> DPSP	Plan name:	Registration number:
<input type="checkbox"/> RSP	Plan name:	
<input type="checkbox"/> Other	Plan name/details:	

Complete for RPPs registered in Ontario

Monitoring of the Summary of Contributions/Revised Summary of Contributions (Form 7) to be done by:

London Life External custodian/pension fund trustee

SECTION 5 - INVESTMENT INSTRUCTIONS**Investment instructions**

Percentage	Name of fund or identifier	Percentage	Name of fund or identifier
_____ % to _____	_____	_____ % to _____	_____
_____ % to _____	_____	_____ % to _____	_____
_____ % to _____	_____	_____ % to _____	_____

IMPORTANT:

- The issuer offers a selection of both guaranteed investments and variable investment funds. Contributions directed to the variable investment funds are not guaranteed and will increase or decrease in value according to fluctuations in the market value of the assets.
- If the Income Tax Act (Canada) imposes restrictions on foreign investments pertaining to segregated funds, the issuer will monitor compliance and automatically adjust member accounts where the foreign content limits are exceeded.
- If the applicant elects to remove one or more of the standard set of asset class options, or chooses not to provide the minimum number of investment options per asset class, both as recommended by the issuer, then the issuer will not be liable for any losses or claims that may result.

SECTION 6 - REPORTING DETAILS

Contribution types	Is record keeping required by contribution type?
	<input type="checkbox"/> No
	<input type="checkbox"/> Yes, indicate the contribution types applicable:
	<input type="checkbox"/> Employer required <input type="checkbox"/> Member voluntary <input type="checkbox"/> Member required <input type="checkbox"/> _____

