

Language preference  English  French

New Issue  
 Change of Carrier  
 Amendment to \_\_\_\_\_  
plan #

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) - 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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A collective agreement creates or supports the plan.  (please provide copy)

**SECTION 2 - POLICY DETAILS**

Effective date of the policy:  _____ Yyyy mm dd	Renewal date of the policy:  The first day of <u>January</u>	Original effective date of the plan (complete for existing plans only):  _____ yyyy mm dd	Effective date of the amendment (if applicable):  _____ yyyy mm dd
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## SECTION 3 - INVESTMENT INSTRUCTIONS

### Investment instructions

Member contributions:  Member to determine allocation (complete member application)  
 Employer to determine allocation (complete chart below)

Employer contributions:  Member to determine allocation (complete member application)  
 Employer to determine allocation (complete chart below)

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

*total allocation must equal 100%*

**Default investment instructions for new contributions.** The default investment option(s) applies to any new contributions made by or on behalf of a member to an account where the member defines investment allocation, and has failed to submit allocation instructions. The default investment option allocation will be as follows:

- 100% to issuer's Daily Interest Account  
 100% to \_\_\_\_\_  
 Other (complete chart below)

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

*total allocation must equal 100%*

### 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 4 - PLAN PROVISIONS

<b>Description of eligible employee class</b>			
<b>ELIGIBILITY &amp; ENROLMENT:</b>			
<b>Eligibility period</b>	<input type="checkbox"/> Immediate <input type="checkbox"/> Following _____ months of continuous employment <input type="checkbox"/> Other: _____	<input type="checkbox"/> Immediate <input type="checkbox"/> Following _____ months of continuous employment <input type="checkbox"/> Other: _____	<input type="checkbox"/> Immediate <input type="checkbox"/> Following _____ months of continuous employment <input type="checkbox"/> Other: _____
<b>Enrolment</b>	<input type="checkbox"/> Optional <input type="checkbox"/> Compulsory	<input type="checkbox"/> Optional <input type="checkbox"/> Compulsory	<input type="checkbox"/> Optional <input type="checkbox"/> Compulsory
<b>CONTRIBUTIONS:</b>			
<b>Member required</b>	<input type="checkbox"/> _____ % of earnings <input type="checkbox"/> Not required <input type="checkbox"/> Other (see special instructions)	<input type="checkbox"/> _____ % of earnings <input type="checkbox"/> Not required <input type="checkbox"/> Other (see special instructions)	<input type="checkbox"/> _____ % of earnings <input type="checkbox"/> Not required <input type="checkbox"/> Other (see special instructions)
<b>Member voluntary</b>	Member voluntary contributions to be allowed: <input type="checkbox"/> Yes <input type="checkbox"/> No	Member voluntary contributions to be allowed: <input type="checkbox"/> Yes <input type="checkbox"/> No	Member voluntary contributions to be allowed: <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Employer</b>	<input type="checkbox"/> Equal to member required contributions <input type="checkbox"/> _____ % of earnings <input type="checkbox"/> Other (see special instructions)	<input type="checkbox"/> Equal to member required contributions <input type="checkbox"/> _____ % of earnings <input type="checkbox"/> Other (see special instructions)	<input type="checkbox"/> Equal to member required contributions <input type="checkbox"/> _____ % of earnings <input type="checkbox"/> Other (see special instructions)
<b>Employee earnings for contribution purposes</b>	<input type="checkbox"/> Basic salary excluding overtime and bonuses <input type="checkbox"/> Basic salary including overtime and bonuses <input type="checkbox"/> Other: _____	<input type="checkbox"/> Basic salary excluding overtime and bonuses <input type="checkbox"/> Basic salary including overtime and bonuses <input type="checkbox"/> Other: _____	<input type="checkbox"/> Basic salary excluding overtime and bonuses <input type="checkbox"/> Basic salary including overtime and bonuses <input type="checkbox"/> Other: _____
<b>BENEFIT PROVISIONS:</b>			
<b>Normal retirement age</b>	<input type="checkbox"/> 65 <input type="checkbox"/> 60 <input type="checkbox"/> Other: _____	<input type="checkbox"/> 65 <input type="checkbox"/> 60 <input type="checkbox"/> Other: _____	<input type="checkbox"/> 65 <input type="checkbox"/> 60 <input type="checkbox"/> Other: _____

## SECTION 5 - SPECIAL INSTRUCTIONS

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