



Current Investment Application Forms as of October 6, 2017

BMO Life Assurance Company	Form Number	Information Folder	Funds Fact
GIF Applications	592E (2017/07/01)	595E (2016/06/21) & GIF Client Guide 616E	595E (2016/06/21) & GIF Client Guide 616E
GIF- TFSA	642E (2017/07/01)	595E (2016/06/21) & GIF Client Guide 616E	595E (2016/06/21) & GIF Client Guide 616E
Single Premium Annuity Application	348E (2017/08/01)		
Canada Life	Form Number	Information Folder	Funds Fact
Canada Life Generations RIF,LIF,RLIF	147 CAN (09/2014)	143 CAN (5/17)	144 CAN (09/2016)-Generation Contract
Canada Life Generations Daily Interest (DI) and Guaranteed Interest (GI) terms (PDF ONLY)	99-6446 (6/17)	46-10782 (03/17)	
Canada Life Segregated Funds for Registered	46-9608 (10/2015)	46-7136 (05/17)	46-7134 (09/2016)
Canada Life TFSA	46-7305 (10/2015)	46-7136 (05/17)	46-7134 (09/2016)
Canada Life Segregated Funds for Non Registered	46-9609 (6/2017)	46-7136 (05/17)	46-7134 (09/2016)
Estate Protection Application for Seg Funds	46-10587 (6/2017)	46-10583 (05/17)	46-10583 (05/17)
Estate Protection Application for Seg Funds- TFSA	46-10586 (11/16)	46-10583 (05/17)	46-10583 (05/17)
Application for Income Annuity	46-8965 (6/2017)		
Desjardins	Form Number	Information Folder	Funds Fact
Helios -Gif- Non Reg/Reg	13137E (16/06)	13188E (17-04)	13188E (17-04)
Helios -GIF TFSA	13139E (16-06)	13188E (17-04)	13188E (17-04)
Term Investment- Contract & Contract Application	14309E (17-07)		
Term Investment- Contract TFSA	14310E (16-01)		
Contract Application- Non Reg/Reg (PDF ONLY)	02162E (15-09)		
Savings Contract- TFSA (PDF ONLY)	08296E (16-07)		
Annuity Application & Contract	1433A (13-11)		
Empire	Form Number	Information Folder	Funds Fact
Class Plus 2.1 Application	INV-917-ENG (6/2017) * Use till Oct 19th, 2017	INV-944-EN (11/16)	INV-941-EN (07/17)
Class Plus 2.1 Application for a TFSA	INV-919-ENG (6/2017) * Use till Oct 19th, 2017	INV-944-EN (11/16)	INV-941-EN (07/17)
Class Plus 3.0	INV-917- ENG 10/17 *start using Oct 23, 2017	INV-1755 - EN (10/17)	INV- 1754 (10/17)
Class Plus 3.0 TFSA	INV-919- ENG 10/17 *start using Oct 23, 2017	INV-1755 - EN (10/17)	INV- 1754 (10/17)
Empire Life Guaranteed Investment Funds Application	INV-911-ENG (6/2017)	INV-943-EN (6/17)	INV-941-EN (07/17)
Empire Life Guaranteed Investment Funds Application (TFSA)	INV-913-ENG (6/2017)	INV-943-EN (6/17)	INV-941-EN (07/17)
Guaranteed Interest Contract (GIC) Application	INV-908-ENG (6/2017)		
Guaranteed Interest Contract (GIC) TFSA Application	INV-910-ENG (6/2017)		
Equitable Life	Form Number	Information Folder	Funds Fact
Pivotal Select TFSA	1383 (2017/05/29)	1403 (2016/07/20)	1366 (2017/08/10)
Pivotal Select Reg/Non Reg	1384 (2017/05/29)	1403 (2016/07/20)	1366 (2017/08/10)
Guaranteed Interest Account TFSA	796 (2017/05/29)	798 (2013/06/19)	



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Guaranteed Interest Account (RIF/LIF)	799 (2017/05/29)	797 (2015/08/01)	
Guaranteed Interest Account Reg/Non -Reg	799 ((2017/05/29)	798 (2013/06/19)	
Application for Payout Annuity	355 (2017/05/29)		
Industrial Alliance	Form Number	Information Folder	Funds Fact
Diploma (PDF ONLY)	F38A (17/07)	F13-443A (2017/05)	F13-443A (2017/05)
My Education- Family (PDF Only)	F28A(15-12)	F13-626A (2017/05)	F14A-5 (2017/05)
My Education- Individual (PDF Only)	F23A(15-12)	F13-626A (2017/05)	F14A-5 (2017/05)
My Education - Investment Funds Contracts (PDF Only)	F24A (12/10)	F13-626A (2017/05)	F14A-5 (2017/05)
My Education Plus (PDF ONLY)	F38A (17/07)	F13-885A - (2017/05)	F14A-12 (2017/05)
TFSA	F17A-1 (15-11)	F13-772A (2017/05)	F14A-10 (2017/05)
IAF Savings & Retirement Plan (Non Reg/Reg)	F17A (15-11) *** Use form F51-208A Confirmation of Identity for Non Reg products	F13-772A (2017/05)	F14A-10 (2017/05)
Ivari (Formerly Transamerica)	Form Number	Information Folder	Funds Fact
GIA	IP1303 (09/2015)		
GIF (KIT IP1289)	IP1299 (11/2016)	IP1300 (2016/10)	IP1300 (2016/10)
GIF- TFSA (KIT IP1326)	IP1302 (11/2016)	IP1300 (2016/10)	IP1300 (2016/10)
Imaxx GIF Application	IP881 (09/2015)	IP882 (9/15)	IP882 (9/15)
Single Premium Annuity Application	IP-NB151 (09/2015)		
LaCapitale	Form Number	Information Folder	Funds Fact
Pan-Canadian RSP	T053 (11-2016)	only Agent's Guide K020- (4/2017) includes Fund Facts	
TFSA Savings Annuity	T087 (1-2017))	only Agent's Guide K020- (4/2017) includes Fund Facts	
Non- Reg (For Only GIC)	T097 (1-2017)	only Agent's Guide K020- (4/2017) includes Fund Facts	
Manulife	Form Number	Information Folder	Funds Fact
GIC	NN0978E (06/2017)	MK1492E together with NN0978E (2011/11)	
GIC-TFSA	NN1566E (04/2016)		
GIF Select/Retirement Plus- Non Reg/ Reg	NN0821E (06/2017)	MK2278E together with MK2442E (2016/04)	MK2442E together with MK2278E (2017/05)
GIF Select/Retirement Plus- RIF/LIF/LRIF.. Application	NN0891E (05/2016)	MK2278E together with MK2442E (2016/04)	MK2442E together with MK2278E (2017/05)
GIF Select - TFSA	NN1565E (05/2016)	MK2278E together with MK2442E (2016/04)	MK2442E together with MK2278E (2017/05)
Retirementplus - Info Folder and Contract		MK2790E (2017/05)	MK2789E (2017/05)
Pension Builder - Application	NN1601E (06/2017)	MK2798E (2017/08)	MK2798E (2017/08)
Seg Fund - TFSA for Pension Builder	NN1565E (05/2016)	MK2798E (2017/08)	MK2798E (2017/08)
Application for Annuity	NN0486E (06/2017)		
RESP Application	NN1619 (2015/10)	MK2760E (2015/04)	MK2760E (2015/04)
Manulife Private Investment Pool	NN0821E (06/2017)	MK2972E (2017/05)	MK2950E (2017/05)
Manulife / Standard Life	Form Number	Information Folder	Funds Fact
Manulife Ideal Signature Select Appl.(Registered&Non-Registered)	CS3876 (2017/06)	MK3368E (2017/05)	MK3369E (2017/05)
Manulife Ideal Signature Select TFSA Appl.	CS3882 (2016/05)	MK3368E (2017/05)	MK3369E (2017/05)
Manulife Bank	Form Number	Information Folder	Funds Fact
TFSA	AB0490E (06/2017)		
Retirement Savings Plan Application	AB0168E (07/2017)		
Advantage Account Application	AB0168E (07/2017)		
Personal Non-registered GIC	AB0168E (07/2017)		
RBC	Form Number	Information Folder	Funds Fact



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GIF Application	83146 (07/2017)	83194 (2016/11)	83194 (2016/11)
TFSA	83124 (11/2016)	83194 (2016/11)	83194 (2016/11)
Payout Annuity Application	84534 (05/2017)		
SSQ	Form Number	Information Folder	Funds Fact
TFSA Application form for Individual Contracts	FRA1251A (2017-06)	BRA1620A (2017-06)	BRA1620A (2017-06)
Application form for Individual Contracts	FRA641A (2017-06)	BRA1620A (2017-06)	BRA1620A (2017-06)
Sunlife	Form Number	Information Folder	Funds Fact
GIC Max- RSP or Non-Reg	810-3547 (06/17)		
GIC Max- TFSA	810-3548-(07-14)		
Sun GIF Solutions & Lifetime Advantage Application	4601 (05/17)	810-4401 (2017/05)	810-4400 (2017/05)
Sun GIF Solutions & Lifetime Advantage (TFSA)	4602 (05/17)	810-4401 (2017/05)	810-4400 (2017/05)
Sun Lifetime Advantage GIF	4601 (05/17)	810-4405 (2017/05)	810-4404 (2017/05)
Sun Lifetime Advantage GIF (TFSA)	4602 (05/17)	810-4405 (2017/05)	810-4404 (2017/05)
Sun Protect GIF	4601 (05/17)	810-4407 (2017/05)	810-4406 (2017/05)
Sun Protect GIF (TFSA)	4602 (05/17)	810-4407 (2017/05)	810-4406 (2017/05)
Superflex Deferred Annuity	810-3549 (06/17)		
Superflex TFSA Application	810-3584 (2014/07)		
Payout Annuity Application	3318-E-(06-17)		
UL-Mutual	Form Number	Information Folder	Funds Fact
Non- Reg & Reg Application	F-004B-1707-E		
TFSA Application	F-007B-1509-E		

Comments

Empire: The latest Class Plus 2.1 is closing to new policies on Oct 20th, 2017. Please use Class Plus 3.0 starting Oct 23rd.

*** No new applications for Class Plus 2.1 will be accepted after Friday Oct 20, 2017 (4pm ET)