

Current Investment Application Forms as of Mar 31, 2023

Beneva <i>**See comment below**</i>	Form Number	Information Folder	Funds Fact
LaCapitale Non-registered plan, RSP, RIF, LIF, Annuity App	T097 (2021-09)		
LaCapitale TFSA Application	T087 (2021-09)		
SSQ TFSA Application <i>(Login Required)</i>	FRA1251A (2022-06)	BRA1620A -AMEN (2022-11) including Beneva Amendment MRA674A (2023-01)	Refer to the <i>Fund Facts</i> document available on ssq.ca
SSQ Application form for Individual Contracts	FRA641A (2022-06)		
BMO Life Assurance Company	Form Number	Information Folder	Funds Fact
GIF Applications	592E (2022/06/13)	602E (2022/06/13)	773E (2022/06/13)
GIF- TFSA	642E (2022/06/13)		
Single Premium Annuity Application	348E (2020/08/01)		
Canada Life	Form Number (Login Required)	Information Folder	Funds Fact
Canada Life Generations RIF,LIF,RLIF	147 CAN (9/21)	143 CAN -8/22	70-0620 -5/22
Canada Life Segregated Funds for Registered	46-9608 (11/22)	46-7136 -11/22	70-0618 -10/22
Canada Life TFSA	46-7305 (11/22)		
Canada Life Segregated Funds for Non Registered	46-9609 (11/22)		
Estate Protection Application for Seg Funds	46-10587 (11/22)	46-10583 – 8/22	70-0621 – 5/22
Estate Protection Application for Seg Funds-TFSA	46-10586 (11/22)		
Application for Income Annuity	46-8965 (11/22)		
Desjardins <i>(Apps only available in PDF format)</i>	Form Number	Information Folder	Funds Fact
Helios2 -GIF- Non Reg/Reg	13137E (2022-11)	13188E (2022-11)	13188E01 (2022-11)
Helios2 -GIF TFSA	13139E (2022-11)		
Term Investment- Contract & Contract Application	14309E (2022-11)		
Term Investment- Contract TFSA	14310E (2022-11)		
Savings Contract- TFSA	08296E (2022-09)		
Annuity Application & Contract	1433A (2022-11)		
Empire	Form Number	Information Folder	Funds Fact
Class Plus 3.0	INV-917- ENG (02/22)	INV-1755 - EN (03/20)	Empire Life can create a customized Fund Facts booklets by visiting the prices & performance page https://www.empire.ca/our-funds/prices-performance
Class Plus 3.0 TFSA	INV-919- ENG (02/22)		
Empire Life Guaranteed Investment Funds Application	INV-911-ENG (04/22)	INV-943 - EN (04/22)	
Empire Life Guaranteed Investment Funds Application (TFSA)	INV-913-ENG (04/22)		
Guaranteed Interest Contract (GIC) Application	INV-908-ENG (01/22)		
Guaranteed Interest Contract (GIC) TFSA Application	INV-910-ENG (02/22)		
Equitable Life	Form Number	Information Folder	Funds Fact
Pivotal Select TFSA	1383 (2022/06/11)	1403 (2022/08/29)	1366 (2022/08/29)
Pivotal Select Reg/Non Reg	1384 (2022/07/28)		
Guaranteed Interest Account TFSA	796 (2020/06/30)		
Guaranteed Interest Account (RIF/LIF)	799 (2022/03/02)	1790 (2021/12/01)	
Guaranteed Interest Account Reg/Non -Reg			
Application for Payout Annuity	355 (2022/03/08)		

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Industrial Alliance (Apps only available in PDF format)	Form Number	Information Folder	Funds Fact
Diploma		F13-443A (22-05)	
My Education +	F38A (22-01)	F13-885A (22-05) with F13-885A_Rider-01 (22-10)	F14A-12 (22-05) + Rider F14-12A-6 (22-09) + Rider F14-12A-7 (23-01) + Rider F14-12A-8 (23-02)
TFSA	F17A-1 (22-05)	F13-772A (22-05) with Rider F13-772A-7 (22-10)	F14A-10 (22-05) + Rider F14-10A-16 (22-09) + Rider F14-10A-17 (23-01) + Rider F14-10A-18 (23-02)
IAG Savings & Retirement Plan Non-Registered/Registered	F17A (22-09)		
RRSP Loan Application	F16A (22-12) Dec 2022		
Manulife	Form Number (Forms can be pre-filled via Online Transactions, Preferred browser: Microsoft Edge - Login Required)	Information Folder	Funds Fact
GIF Select - Non Reg/ Reg	NN0821E (10/2022)		Manulife can create customized Fund Facts booklets by visiting www.manulifeim.ca/SFProfiles .
GIF Select - RIF/LIF/LRIF	NN0891E (10/2022)	MK2278E (11/2022)	
GIF Select - TFSA	NN1565E (10/2022)		
RESP Application	NN1619E (10/2019)	MK2755E (11/2022)	
Manulife Private Investment Pool - MPIP Seg Pools	NN0821E (10/2022)	MK2972E (11/2022)	
Manulife Bank	Form Number (Login Required)	Information Folder	Funds Fact
TFSA	AB0490E (06/2022)		
Retirement Savings Plan Application			
Advantage Account Application	AB0168E (06/2022)		
Personal Non-registered GIC			
RBC	Form Number	Information Folder	Funds Fact
GIF Application	83146 & (11/2022)	83194 (11/2022)	83194 (11/2022)
TFSA	83124 & (11/2022)		
Payout Annuity Application	84534 & (10/2021)		
Sunlife	Form Number	Information Folder	Funds Fact
GIC Max- RSP or Non-Reg (PDF only)	810-3547-12-21		
GIC Max- TFSA (PDF Only)	810-3548-12-21		
Sun GIF Solutions / Lifetime Advantage Application & Sun Protect GIF	4601-E-06-22	810-4401-06-22 Sun GIF Solutions 810-4405-06-22 Sun Advantage	Refer info on the website https://www.sunlifeglobalinvestments.com/en/resources/regulatory-documents/sun-life-gifs-fund-facts-listing/
Sun GIF Solutions/ Lifetime Advantage (TFSA) & Sun Protect GIF (TFSA)	4602-E-06-22		
Superflex Deferred Annuity (PDF Only)	810-3549-12-21		
Superflex TFSA Application (PDF Only)	810-3584-12-21		
Payout Annuity Application	3318-E-12-21		
UV Insurance	Form Number	Information Folder	Funds Fact
Annuity and GIC-Type Products (Non-Reg & Reg Application)	EN-8006 (2021-02)		
GIC-Type Products - TFSA Application	EN-8007 (2021-08)		

Comments

****Kindly note that the investment products for LaCapitale & SSQ will become Beneva in Spring 2023. Thank you!**

**** Effective Monday, January 16, 2023, the "SSQ" Fundserv manufacturer code will be transferred to a new "BNV" code, which corresponds to Beneva Inc.**