

# Application for membership in a retirement savings plan

Return to Great-West Life, Group Retirement Services 255 Dufferin Avenue, T540, London, ON N6A 4K1

SECTION 1 - EMPLOTER/PLAN SPONS	OK INFORMA	HON							
Name of employer/plan sponsor				Policy/plan number					
BEST BUY CA		4)					6469	93	
SECTION 2 – APPLICANT INFORMATIO	N (please prin	it)							
The applicant is applying for:		1		1					
Personal RSP – the applicant is the owner and person contributing to the plan. Do not complete section 3.		n AND	a		pplicant's spo	use/c	ommon-law	partner	owner and the is the person
ID number (completed by London Life)		<del>)</del>			ontributing to the plan. Section 3 must be completed.  O number (completed by London Life,			•	
Last name Middle initial First name		<u> </u>			Divisi subg			Identification/employee number (if applicable)	
			☐ S		e common-law of employee	01			
Social insurance number	Date of birt	h	ρō	ai ti iei t	Marital status			Language	preference
Applicant authorizes use of his/her social insurance number for tax reporting, identification and record keep			☐ Ma	ale emale	☐ Married ☐ Quebec ci		on		English French
Address (apt. no., street no., street)	City	Province	Posta	l code	Telephone nu	mber	Email add	ress	
							Required for	online acces	ss to your account
SECTION 3 – RSP SPOUSAL CONTRIB	UTOR INFORM	IATION							
Last name of contributing employee/contribu	itor Fire	st name			Social insurar	ice nu -	mber	ID/emp	ployee number
SECTION 4 – ISSUER INFORMATION									
The Great-West Life Assurance Company an licence by London Life Insurance Company (Lowest. The group retirement, savings and annuit SECTION 5 – BENEFICIARY INFORMAT Primary beneficiary(ies)	ondon Life) for th ty product(s) des	e promotion	and m	arketin	g of insurance	produc	ts. London		
Last name F	First name				Relationship	to api	olicant		% of benefit
									Total 100%
Unless the law requires otherwise, if one of my equal shares, or if there is no surviving primary the benefit will be paid to my estate.  Contingent beneficiary(ies)	primary beneficia beneficiary(ies),	aries predec to my contir	ceases ingent be	me, his eneficia	/her share will bary(ies) named b	e paid below.	I to the surv If there is n	viving prima no continger	ry beneficiaries in nt beneficiary(ies),
Last name F	First name				Relationship	to app	olicant		% of benefit
									Total 100%
These designations are for all benefits payable All beneficiary designations are revocable <b>exce</b> • where a <i>Designation of irrevocable benefit</i>	ept: ciary form is com	oleted							n-law partner.
where Quebec law applies and you have of the control of the c	designated your n	narried or civ	vii unior	ı spous	se as your bene	iiciary	- read the b	ox below.	
Where Quebec law applies:     If you designate your married or civil restrictions will apply, unless you obtain withdrawals (where permitted) or exercis I designate my married or civil union spot	the consent of yo sing certain other ri	ur spouse. F ghts.	or exam						

Where a minor beneficiary resides in Quebec - Benefits payable under this plan to a beneficiary who, at the time payment is to be made, is a minor, will be paid to his/her tutor(s), unless a valid trust has been established for the benefit of the minor, by will or by separate contract, to receive the benefits and the Issuer has been provided notice of the trust. If a trust has already been established, designate the trust as the beneficiary in this section. Legal advice should be sought.

### SECTION 6 - TRUSTEE APPOINTMENT

(to be completed if any of the beneficiaries are minors or otherwise lack legal capacity AND DO NOT RESIDE IN QUEBEC)

If a formal trust does no	t exist. I hereby a	nnoint.

Full name of <b>trustee</b> being appointed (last name, then first):	Trustee for (indicate beneficiary name)	Relationship of trustee to applicant:

as trustee to receive, in trust, all benefits payable to any beneficiary designated under the plan(s) who, at the time benefits are paid, is a minor or lacks legal capacity to give a valid discharge according to the laws of the beneficiary's domicile. Payment of benefits to the trustee discharges London Life to the extent of the payment. I authorize the trustee in his or her sole discretion to use the benefits for the education or maintenance of the beneficiary and to exercise any right of the beneficiary under the plan(s). The trustee may, in addition to the investments authorized for trustees, invest in any product of, or offered by, London Life or its affiliated financial institutions. The trust for any beneficiary will terminate once that beneficiary is both of age of majority and has legal capacity to give a valid discharge. I direct the trustee to deliver at that time to the beneficiary the assets held in trust for that beneficiary. I or my personal representative may by writing appoint a new trustee to replace the former trustee.

# SECTION 7 - PAYROLL DEDUCTION AUTHORIZATION (complete for Personal RSPs where payroll authorization is applicable)

I authorize my employer to deduct \$\_\_\_\_\_ from each pay. (Enter zero if the RSP is for Flex credits only.)

#### SECTION 8 – INVESTMENT ALLOCATION INSTRUCTIONS

Please provide investment instructions for member contributions. If applicable, the same instruction will apply to employer contributions. The Issuer offers a selection of both guaranteed investments and variable investment funds. Contributions directed to variable investment funds are not guaranteed and will increase or decrease in value according to fluctuations in the market value of the assets. If no election is made, contributions will be invested in the default investment option.

<u>Lifecycle Funds</u> (choose only one)			Balanced Funds		
BlackRock LifePath 2010 Retirement Fund	BGI10	%	Balanced Fund Leith Wheeler	S196	%
BlackRock LifePath 2015 Fund	BGI15	%	Income Fund Portico	LINCL _	%
BlackRock LifePath 2020 Fund	BGI20	%	Canadian Equity Funds		
BlackRock LifePath 2025 Fund	BGI25	%	Equity Fund CC&L	PCE	%
BlackRock LifePath 2030 Fund	BGI30	% %	Canadian Equity Fund Leith Wheeler	S195	%
BlackRock LifePath 2035 Fund	BGI35	% %		_	
BlackRock LifePath 2040 Fund	BGI40	%	Foreign Equity Funds	A EMD	0/
BlackRock LifePath 2045 Fund	BGI45	%	American Equity Fund MFS McLean Budden	AEMB _	%
BlackRock LifePath 2050 Fund	BGI50	%	U.S. Equity Index Fund TDAM	LUSET _	%
Cash and Equivalent Fund			International Equity Fund MFS McLean Budden	IEIVID _	%
Money Market Fund Portico	LLMON	%			
Fixed Income Funds					
Canadian Bond Fund GWLIM	LCBG	%	Total allocation must equa	l 100%	
Canadian Bond Index Fund TDAM	S079	%			

## **SECTION 9 – CONFIDENTIAL INFORMATION FILE**

The Issuer will establish a confidential information file that contains personal information concerning the applicant. By submitting a written request to the Issuer, the applicant may exercise rights of access to, and rectification of, the file. The Issuer will collect, use and disclose the applicant's personal information to: process this application and provide, administer and service the plan applied for (including service quality assessments by or on behalf of the Issuer); advise the applicant of products and services to help the applicant plan for financial security; investigate, if required, and pay benefits under the plan; create and maintain records concerning our relationship as appropriate; and, fulfil such other purposes as are directly related to the preceding. The Issuer may use service providers within or outside Canada. Personal information concerning the applicant will only be available to the applicant, plan sponsor, pension and related government authorities, the Issuer, their affiliates, and any duly authorized employees, agents and representatives of the Issuer or their affiliates, within or outside Canada, for or related to the purpose of the plan, except as otherwise may be required, authorized or allowed by law or legal process, or by the applicant. In all cases, availability is subject to lawful determination by the Issuer. Personal information is collected, used, disclosed, or otherwise processed or handled in accordance with governing law, including applicable privacy legislation, and the applicant's personal information may be subject to disclosure to those authorized under applicable law within or outside Canada. For more information about our privacy practices, please ask for a copy of our Privacy Guidelines brochure.

# **SECTION 10 – APPLICATION FOR REGISTRATION**

I apply for membership in the retirement savings plan(s) and authorize the plan sponsor to act as my agent for the purpose of the plan(s). I request that London Life Insurance Company (the "Issuer") apply to register the plan(s) as registered retirement savings plan(s) under the Income Tax Act (Canada) and any similar provincial law. If locked-in pension funds are transferred to the plan(s), I agree and acknowledge that such funds will be governed by the locked-in retirement account endorsement, locked-in retirement savings plan endorsement or restricted locked-in savings plan endorsement, as applicable (the "locked-in endorsement"), which will form part of the plan(s) and will override the terms of the retirement savings plan certificate issued to the member to the extent of any inconsistency between the certificate and the endorsement.

## **SECTION 11 – SIGNATURE**

I confirm the instructions, designations and appointment on this form. I am aware of the reasons the information covered by my authorizations and consents is needed, and the benefits of, and the risks of not, authorizing/consenting. I authorize and consent to the Issuer collecting, using, and disclosing personal information concerning me for the purposes outlined in the Confidential Information File section. This authorization and consent is given in accordance with applicable law and without limiting the authorizations and consents given elsewhere in this application. My authorizations and consents will begin the date this application is signed and end when no longer required. My authorizations and consents may be revoked at any time by either written or electronic notification to the Issuer, subject to legal and contractual considerations. A reproduction of my authorizations and consents will be as valid as the original. If I cease to be eligible to participate in the plan(s) and do not make an election in accordance with the terms of the plan(s), the Issuer is authorized to exercise transfer or withdrawal options provided in the plan(s), and I hereby appoint the Issuer as my agent for this and any related purpose.

Signature of applicant Date