

Deloitte Private Investment Program
Forms for Making Changes to Your Investment Account

Thank you for your continued investment in the program. You may want to make changes to your account(s) and there are several forms below that you can use to make such changes.

For changes to:

- Your *demographic information* such as your name, address, or account beneficiary, please use the form on the first page below titled "DEMOGRAPHIC AND BENEFICIARY CHANGES"
- The *Personal Investor information* you previously provided, such as your investment time horizon, investment knowledge, investment objective, risk tolerance, net worth, annual income, please use the form on the last page of this package, titled "Investor Information (KYC) Changes".
- The *investment selections for your RRSP, Spousal RRSP or LIRA*, please use the form on the second page below titled "REBALANCES AND SWITCHES RRSP" *
- The *investment selections for your Non-Registered account*, please use the form titled "REBALANCES AND SWITCHES NON REGISTERED" *

****** Prior to Integra submitting any switch or rebalance requests on your behalf, you will be required to complete sections 2-4 of a Risk Acknowledgement Form (RAF) and to send this Form back to Integra. This Form is required pursuant to Securities Legislation and will be sent to you upon request for any such investment changes.***

Please submit any investment selection request to us and leave the "CURRENT BALANCE TRANSFER", "FUTURE CONTRIBUTIONS" and/or "FUND SWITCHES" sections blank on the form (do not enter any dollar or percentage amounts next to fund names). We will have one of our portfolio managers call you to discuss your investments and objectives and help in the fund selection process. If there is a particular day and time that you would prefer this call, please make this note on or with your request.

Once your fund selections have been determined the partially completed RAF will be sent to you by Integra, for your completion. Your changes will then be implemented once we receive the completed and signed RAF back from you.



Deloitte Private Investment Program
DEMOGRAPHIC & BENEFICIARY CHANGES

RRSP SPOUSAL RRSP LIRA NON REGISTERED

PLEASE COMPLETE THE NAME, S.I.N. AND ONLY THOSE FIELDS WHICH MUST BE AMENDED

APPLICANT S.I.N. DATE OF BIRTH MM DD YY
FIRST NAME SURNAME
IS THIS A NAME CHANGE? (Y/N) PLEASE ENTER PREVIOUS SURNAME BELOW
PREVIOUS SURNAME
ADDRESS: NUMBER & STREET APT.
CITY PROVINCE POSTAL CODE

BENEFICIARY INFORMATION

I hereby designate the following person(s) as my beneficiary, to receive any benefits payable in the event of my death. I understand that any benefits payable on my death may be required by federal or provincial legislation to be payable to my spouse as beneficiary. I also understand that, in the Province of Quebec, beneficiary designations are not valid, unless they are made in my will, and I will therefore ONLY designate my estate in the area below. Furthermore, I have read and understand the definition of spouse and all other beneficiary rules contained in the plan description. Should my beneficiary predecease me, all benefits shall be made payable to my estate. I reserve the right to revoke the designation of my beneficiary, including the designation of my spouse.

Table with 3 columns: BENEFICIARY FIRST/LAST NAME, RELATIONSHIP, DESIGNATION %

I understand that after revising my participant information Integra will send me a confirmation slip which indicates the new information for my plan(s). I hereby agree to immediately notify Integra in writing should my confirmation slip contain incorrect information and furthermore agree to absolve Integra from all liability should I not so notify Integra.

This authorization form shall be valid from the date entered by Integra Capital Management Corporation.

SIGNATURE OF APPLICANT DATE

Deloitte Private Investment Program Investor Information (KYC) Changes

- RRSP (2)
- SPOUSAL RRSP (2)
- NON-REGISTERED (3)
- FAMILY TRUST (4)
- CORPORATE TRUST (5)

NAME _____

S.I.N _____

INVESTMENT KNOWLEDGE	<input type="checkbox"/> MINIMAL	<input type="checkbox"/> FAIR	<input type="checkbox"/> GOOD	<input type="checkbox"/> EXCELLENT	
INVESTMENT OBJECTIVES	<input type="checkbox"/> GROWTH	<input type="checkbox"/> GROWTH & INCOME	<input type="checkbox"/> INCOME	<input type="checkbox"/> SAFETY	
RISK TOLERANCE	<input type="checkbox"/> MINIMAL	<input type="checkbox"/> LOW	<input type="checkbox"/> MODERATE	<input type="checkbox"/> HIGH	
INVESTMENT TIME HORIZON	<input type="checkbox"/> 0-3 YRS.	<input type="checkbox"/> 3-10 YRS.	<input type="checkbox"/> OVER 10 YRS.		
NET WORTH	<input type="checkbox"/> UNDER \$25,000	<input type="checkbox"/> \$25,000 - \$49,999	<input type="checkbox"/> \$50,000 - \$99,999	<input type="checkbox"/> \$100,000 - \$250,000	<input type="checkbox"/> OVER \$250,000

ANTI MONEY LAUNDERING LEGISLATION REQUIRES US TO HAVE YOU INDICATE THE PURPOSE OF THE INTENDED USE OF THE ACCOUNT(S): (for example, savings, retirement, etc.) _____

OCCUPATION: _____



DELOITTE PRIVATE INVESTMENT PROGRAM
REBALANCES AND SWITCHES
RRSP

 RRSP (2)

 Spousal RRSP (2)

 LIRA (L)

NAME _____

MIKEY _____

S.I.N. _____

SECURITIES LEGISLATION REQUIRES US TO ASK THE FOLLOWING INFORMATION BEFORE OPENING AN ACCOUNT (ONE RESPONSE PER LINE PLEASE):

INVESTMENT KNOWLEDGE	<input type="checkbox"/> MINIMUM	<input type="checkbox"/> FAIR	<input type="checkbox"/> GOOD	<input type="checkbox"/> EXCELLENT
INVESTMENT OBJECTIVES	<input type="checkbox"/> GROWTH	<input type="checkbox"/> GROWTH & INCOME	<input type="checkbox"/> INCOME	<input type="checkbox"/> SAFETY
RISK TOLERANCE	<input type="checkbox"/> MINIMAL	<input type="checkbox"/> LOW	<input type="checkbox"/> MODERATE	<input type="checkbox"/> HIGH
INVESTMENT TIME HORIZON	<input type="checkbox"/> 0 - 3 YEARS	<input type="checkbox"/> 3 - 10 YEARS	<input type="checkbox"/> OVER 10 YEARS	
NET WORTH	<input type="checkbox"/> UNDER \$25,000	<input type="checkbox"/> \$25,000 - \$49,999	<input type="checkbox"/> \$50,000 - \$99,999	<input type="checkbox"/> \$100,000 - \$250,000 <input type="checkbox"/> OVER \$250,000

CURRENT BALANCE TRANSFER - Please change my balance to be invested in the following Funds:

INVESTMENT SELECTIONS

	BEUTEL GOODMAN AMERICAN EQUITY FUND
	BEUTEL GOODMAN BALANCED FUND
	BEUTEL GOODMAN CDN DIVIDEND FUND
	BEUTEL GOODMAN CDN EQUITY FUND
	BEUTEL GOODMAN GLOBAL FUND
	BEUTEL GOODMAN INCOME FUND
	BEUTEL GOODMAN INTERNATIONAL EQUITY FUND
	BEUTEL GOODMAN SHORT TERM BOND FUND
	FRANKLIN BISSETT CANADIAN BALANCED FUND
	FRANKLIN BISSETT CANADIAN EQUITY FUND
	FRANKLIN BISSETT SMALL CAP FUND
	FRANKLIN U.S. RISING DIVIDEND FUND
	INTEGRA BALANCED FUND
	INTEGRA BOND FUND
	INTEGRA CANADIAN VALUE GROWTH FUND

	INTEGRA EQUITY FUND
	INTEGRA INTERNATIONAL EQUITY FUND
	INTEGRA US VALUE GROWTH FUND
	INCLUDEN INCOME PLUS POOLED FUND
	LINCLUDEN PRIVATE CLIENT BOND POOLED FUND
	LINCLUDEN SHORT TERM INVESTMENT FUND
	TEMPLETON GLOBAL BOND FUND
	TEMPLETON GLOBAL SMALLER COMPANIES
	TEMPLETON GROWTH FUND
	TEMPLETON INTERNATIONAL STOCK FUND
	INVESCO ACTIVE MULTI-SECTOR CREDIT FUND
	INVESCO CANADIAN FUND
	INVESCO GLOBAL COMPANIES FUND
	INVESCO INCOME GROWTH FUND
	INVESCO U.S. COMPANIES FUND
	INVESCO GLOBAL ENDEAVOUR FUND

FUTURE CONTRIBUTIONS - Please direct my future contributions to be invested in the following Funds:

INVESTMENT SELECTIONS

	BEUTEL GOODMAN AMERICAN EQUITY FUND
	BEUTEL GOODMAN BALANCED FUND
	BEUTEL GOODMAN CDN DIVIDEND FUND
	BEUTEL GOODMAN CDN EQUITY FUND
	BEUTEL GOODMAN GLOBAL FUND
	BEUTEL GOODMAN INCOME FUND
	BEUTEL GOODMAN INTERNATIONAL EQUITY FUND
	BEUTEL GOODMAN SHORT TERM BOND FUND
	FRANKLIN BISSETT CANADIAN BALANCED FUND
	FRANKLIN BISSETT CANADIAN EQUITY FUND
	FRANKLIN BISSETT SMALL CAP FUND
	FRANKLIN U.S. RISING DIVIDEND FUND
	INTEGRA BALANCED FUND
	INTEGRA BOND FUND
	INTEGRA CANADIAN VALUE GROWTH FUND

	INTEGRA EQUITY FUND
	INTEGRA INTERNATIONAL EQUITY FUND
	INTEGRA US VALUE GROWTH FUND
	INCLUDEN INCOME PLUS POOLED FUND
	LINCLUDEN PRIVATE CLIENT BOND POOLED FUND
	LINCLUDEN SHORT TERM INVESTMENT FUND
	TEMPLETON GLOBAL BOND FUND
	TEMPLETON GLOBAL SMALLER COMPANIES
	TEMPLETON GROWTH FUND
	TEMPLETON INTERNATIONAL STOCK FUND
	INVESCO ACTIVE MULTI-SECTOR CREDIT FUND
	INVESCO CANADIAN FUND
	INVESCO GLOBAL COMPANIES FUND
	INVESCO INCOME GROWTH FUND
	INVESCO U.S. COMPANIES FUND
	INVESCO GLOBAL ENDEAVOUR FUND

FUND SWITCHES - Please move the following funds:

Move \$ _____ or _____ % from _____ to _____

Move \$ _____ or _____ % from _____ to _____

Move \$ _____ or _____ % from _____ to _____

Move \$ _____ or _____ % from _____ to _____

SIGNATURE OF INTEGRA _____

DATE _____



CAPITAL LIMITED

DELOITTE PRIVATE INVESTMENT PROGRAM
REBALANCES AND SWITCHES
NON-REGISTERED

NON-REGISTERED

FAMILY TRUST

CORPORATE TRUST

NAME MKEY S.I.N

SECURITIES LEGISLATION REQUIRES US TO ASK THE FOLLOWING INFORMATION BEFORE OPENING AN ACCOUNT (ONE RESPONSE PER LINE PLEASE):

INVESTMENT KNOWLEDGE, INVESTMENT OBJECTIVES, RISK TOLERANCE, INVESTMENT TIME HORIZON, NET WORTH. Includes checkboxes for levels like MINIMUM, FAIR, GOOD, EXCELLENT, GROWTH, GROWTH & INCOME, INCOME, SAFETY, etc.

ANTI MONEY LAUNDERING LEGISLATION REQUIRES US TO HAVE YOU INDICATE THE PURPOSE OF THE INTENDED USE OF THE ACCOUNT(S): (for example, savings, retirement, etc.)

OCCUPATION

CURRENT BALANCE TRANSFER - Please change my balance to be invested in the following Funds:

INVESTMENT SELECTIONS

Table with 2 columns: Fund Name, Selection. Lists various funds like ACADIAN CORE INTERNATIONAL EQUITY FUND, BEUTEL GOODMAN AMERICAN EQUITY FUND, etc.

Table with 2 columns: Fund Name, Selection. Lists various funds like INTEGRA EMERGING MARKETS EQUITY FUND, INTEGRA EQUITY FUND, etc.

FUTURE CONTRIBUTIONS - Please direct my future contributions to be invested in the following Funds:

INVESTMENT SELECTIONS

Table with 2 columns: Fund Name, Selection. Lists various funds like ACADIAN CORE INTERNATIONAL EQUITY FUND, BEUTEL GOODMAN AMERICAN EQUITY FUND, etc.

Table with 2 columns: Fund Name, Selection. Lists various funds like INTEGRA EMERGING MARKETS EQUITY FUND, INTEGRA EQUITY FUND, etc.

FUND SWITCHES - Please move the following funds:

Form with 4 rows for fund switches. Each row includes fields for 'Move \$', 'or', '%', 'from', and 'to'.

SIGNATURE OF INTEGRA DATE