



Application for your Ideal Segregated Funds - Signature Series Contract

Tax-free Savings Account

Standard Life 

How to Complete the Application Form*

For more details see Administrative Guidelines on Advisor Source at www.standardlife.ca

Use this form to **apply for a new Ideal Segregated Funds - Signature Series Contract – Tax-free Savings Account** or to make an **additional premium payment**.

Complete all sections of the application as required. Unclear and/or incomplete information will delay the start of the selected investment and a premium under a new contract or additional premium to an existing contract will be allocated to the Ideal Money Market Fund. Upon receipt of the required information, a switch will be processed to the selected Fund(s) using the switch date as the effective date.

Top of Form

- New contract - select *New plan* and complete each section as required.
- Additional premium - select *Additional premiums* and enter the existing contract number. Complete sections 5 to 13 as required, and sections 3 and 4 for a change in Successor Planholder and Beneficiary.
- The Back-End Load and No-Load premium allocation options can be accommodated under the same contract.
- The Low-Load and Platinum No-Load premium allocation options each require separate contracts.

1 Planholder Information Provide complete information on the Planholder. The Planholder must be an individual who is a Canadian resident aged 18 years or over. For *Nature of principal business or occupation*, enter the type of business or occupation of the Planholder, e.g., “public relations firm”, “lawyer”, etc. If retired, enter the former occupation, e.g., retired teacher.

2 Identity Verification of Planholder Complete this section for a new contract. The document used to verify the Planholder’s identity cannot be expired. A provincial health insurance card, Record of Landing or Permanent Resident Card may also be used to verify the identity (**Manitoba, New Brunswick, Ontario and P.E.I.** – in these provinces it is prohibited to request or accept a Planholder’s health card. **Quebec** - you cannot ask to see a Planholder’s health card, but you may accept it if it is offered by the Planholder).

4 Beneficiary Information If no Beneficiary is named and a Successor Planholder is not named in section 3, the Beneficiary will default to the Planholder’s estate.

5 Series Information The Ideal 75/100 Series, Ideal 100/100 Series and Ideal Income Series are available under the same contract with a maximum of one of each Series per contract.

7 Premium Payment Information and Allocation

Instructions See opposite page for Fund names and numbers, and premium minimums.

Source of Funds: Check the applicable box to indicate the source of funds. For a transfer from an existing Standard Life contract, select *Internal Transfer* and enter the contract number the funds are being transferred from. Use *Transfer authorization for registered investments* form 6511 to transfer TFSA funds from another financial institution. This form is available from the *General* section of Forms on Advisor Source at www.standardlife.ca. Specimen plan number is TFSA 02670032.

Select the Ideal Segregated Fund(s) and Series by entering the Fund name and Series Fund number in the **Premium allocation option** column.

Under **Premium Payment** select **Amount** or **Percent** and enter the dollar amount or percentage of the premium to be allocated to the selected Fund(s). For a **pre-authorized debit (PAD)** plan, enter the dollar amount to be allocated to the selected Fund(s) and complete section 9.

To select **dollar cost averaging**, indicate the Funds between which the switch is to be made by entering the amounts in the *From Fund* and *To Fund* columns. Switches are permitted between Funds within the same Series and same premium allocation option. The minimum for the Platinum No-Load option is \$1,000 per Fund. The minimum for all other options is \$250 per Fund. Complete section 9.

For a **systematic withdrawal plan (SWP)**, select **Amount** or **Percent**, enter the dollar amount or percentage to be withdrawn from the selected Fund(s) and complete section 9. The following minimum balances and SWP payments must be respected:

Premium load option	Ideal 75/100 Series and Ideal 100/100 Series		Ideal Income Series	
	Minimum Balance	Minimum SWP payment	Minimum Balance	Minimum SWP payment
All options except Platinum No-Load Option	\$5,000 per series	\$100	\$25,000 per series	\$100
Platinum No-Load Option	\$250,000 per contract	\$500	\$250,000 per contract	\$500

8 Life Income Date Complete this section to specify a Life Income Date under the Ideal Income Series. Minimum age is 55 years old.

9 PAD Plan, Dollar Cost Averaging or SWP Select the frequency and complete the applicable area. For a PAD plan or SWP, submit a personalized void cheque or provide stamped confirmation from the bank with the following details: bank name, transit number, bank code and Planholder’s bank account number.

11 Advisor Information Enter the information requested. For **manual** processing, enter the advisor’s 6-digit code (e.g., 099999) and the sales office (distributor) code (5 letters) provided by Standard Life. For **electronic** processing, enter the advisor and distributor codes. The servicing advisor will be the person who signs the application form, unless indicated otherwise for split cases. To identify the servicing advisor, add the remarks “servicing advisor” beside the advisor’s name. The servicing advisor receives copies of client statements/notices and has access to the client’s records through ClientINFO.

12 Authorization and Signature The Planholder must sign and date the application in this section.

13 Advisor Declaration and Signature The advisor must sign and enter the date in this section.

The 4th copy is given to the Planholder together with the Ideal Segregated Funds – Signature Series Information Folder. Send the original to Standard Life.

* These instructions are valid as of the date of printing and are subject to change.

The Canada Revenue Agency (CRA) maximum premium allowed for the 2011 calendar year is \$5,000. For more information visit the CRA web site at www.cra.gc.ca and see TFSA contribution room.

Premium Minimums – Back-End Load, Low-Load and No-Load Options			
Ideal 75/100 Series and Ideal 100/100 Series		Ideal Income Series	
Initial Premium (New Contract)	Additional Premiums	Initial Premium (New Contract)	Additional Premiums
\$1,000 per Series (\$250 per Fund) or \$50 PAD per Fund	\$250 per Fund or \$50 PAD per Fund	\$25,000 per Series (\$1,000 per Fund)	\$1,000 per Fund or \$50 PAD per Fund*

Premium Minimums – Platinum No-Load Option			
Ideal 75/100 Series and Ideal 100/100 Series		Ideal Income Series	
Initial Premium (New Contract)	Additional Premiums	Initial Premium (New Contract)	Additional Premiums
\$250,000 per Contract (\$5,000 per Fund)	\$5,000 per Fund or \$1,000 PAD per Fund*	\$250,000 per Contract \$25,000 per Series (\$5,000 per Fund)	\$5,000 per Fund or \$1,000 PAD per Fund*

* Minimum initial premium must be respected prior to starting a Pre-Authorized Debit Agreement.

Ideal Segregated Funds – Signature Series Fund Names and Numbers												
Fund Name	Fund Numbers											
	Ideal 75/100 Series				Ideal 100/100 Series				Ideal Income Series			
	Back-End Load	Low-Load	No-Load	Platinum No-Load	Back-End Load	Low-Load	No-Load	Platinum No-Load	Back-End Load	Low-Load	No-Load	Platinum No-Load
Fixed Income Funds												
Ideal Money Market	703	7103	7303	7403	803	8103	8303	8403	603	6103	6303	6403
Ideal Canadian Bond	701	7101	7301	7401	801	8101	8301	8401	601	6101	6301	6401
Ideal Corporate Bond	708	7108	7308	7408	808	8108	8308	8408	-	-	-	-
Ideal International Bond	709	7109	7309	7409	809	8109	8309	8409	-	-	-	-
Balanced Funds												
Ideal Income Balanced	705	7105	7305	7405	805	8105	8305	8405	605	6105	6305	6405
Ideal Russell Income Essentials Portfolio	744	7144	7344	7444	844	8144	8344	8444	644	6144	6344	6444
Ideal Monthly Income	713	7113	7313	7413	813	8113	8313	8413	613	6113	6313	6413
Ideal Fidelity Monthly Income	764	7164	7364	7464	864	8164	8364	8464	664	6164	6364	6464
Ideal Balanced	700	7100	7300	7400	800	8100	8300	8400	600	6100	6300	6400
Ideal Trimark Balanced	740	7140	7340	7440	840	8140	8340	8440	-	-	-	-
Ideal Dynamic Power Balanced	766	7166	7366	7466	866	8166	8366	8466	-	-	-	-
Ideal Invesco Canadian Balanced	741	7141	7341	7441	841	8141	8341	8441	641	6141	6341	6441
Ideal Fidelity Canadian Balanced	742	7142	7342	7442	842	8142	8342	8442	642	6142	6342	6442
Ideal Fidelity Canadian Asset Allocation	743	7143	7343	7443	843	8143	8343	8443	-	-	-	-
Ideal Russell Diversified Monthly Income Portfolio	745	7145	7345	7445	845	8145	8345	8445	645	6145	6345	6445
Ideal Templeton Global Income	746	7146	7346	7446	846	8146	8346	8446	-	-	-	-
Ideal Trimark Global Balanced	747	7147	7347	7447	847	8147	8347	8447	647	6147	6347	6447
Ideal Fidelity Global Asset Allocation	748	7148	7348	7448	848	8148	8348	8448	-	-	-	-
Equity Funds												
Ideal Dividend Income	720	7120	7320	7420	820	8120	8320	8420	-	-	-	-
Ideal Fidelity Dividend	765	7165	7365	7465	865	8165	8365	8465	-	-	-	-
Ideal Canadian Dividend Growth	704	7104	7304	7404	804	8104	8304	8404	-	-	-	-
Ideal Canadian Equity	702	7102	7302	7402	802	8102	8302	8402	-	-	-	-
Ideal Canadian Equity Focus	722	7122	7322	7422	822	8122	8322	8422	-	-	-	-
Ideal Canadian Small Cap	710	7110	7310	7410	810	8110	8310	8410	-	-	-	-

(continued)

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Ideal Segregated Funds – Signature Series Fund Names and Numbers (continued)

Fund Name	Fund Numbers											
	Ideal 75/100 Series				Ideal 100/100 Series				Ideal Income Series			
	Back-End Load	Low-Load	No-Load	Platinum No-Load	Back-End Load	Low-Load	No-Load	Platinum No-Load	Back-End Load	Low-Load	No-Load	Platinum No-Load
U.S. Equity Funds												
Ideal U.S. Dividend Growth	721	7121	7321	7421	821	8121	8321	8421	-	-	-	-
Ideal U.S. Equity Value	706	7106	7306	7406	806	8106	8306	8406	-	-	-	-
International Equity Funds												
Ideal Global Dividend Growth	719	7119	7319	7419	819	8119	8319	8419	-	-	-	-
Ideal Global Equity	714	7114	7314	7414	814	8114	8314	8414	-	-	-	-
Ideal International Equity	707	7107	7307	7407	807	8107	8307	8407	-	-	-	-
Portfolios												
Ideal Conservative	715	7115	7315	7415	815	8115	8315	8415	615	6115	6315	6415
Ideal Moderate	716	7116	7316	7416	816	8116	8316	8416	616	6116	6316	6416
Ideal Growth	717	7117	7317	7417	817	8117	8317	8417	617	6117	6317	6417
Ideal Dividend Growth & Income	728	7128	7328	7428	828	8128	8328	8428	-	-	-	-
Ideal Aggressive	718	7118	7318	7418	818	8118	8318	8418	-	-	-	-
Ideal Global	729	7129	7329	7429	829	8129	8329	8429	-	-	-	-
Ideal Select Conservative	749	7149	7349	7449	849	8149	8349	8449	649	6149	6349	6449
Ideal Select Moderate	750	7150	7350	7450	850	8150	8350	8450	650	6150	6350	6450
Ideal Select Growth	751	7151	7351	7451	851	8151	8351	8451	651	6151	6351	6451
Ideal Select Dividend Growth & Income	753	7153	7353	7453	853	8153	8353	8453	-	-	-	-
Ideal Select Aggressive	752	7152	7352	7452	852	8152	8352	8452	-	-	-	-
Ideal Select Global	754	7154	7354	7454	854	8154	8354	8454	-	-	-	-
Ideal Russell LifePoints® Balanced Income	755	7155	7355	7455	855	8155	8355	8455	655	6155	6355	6455
Ideal Russell LifePoints® Balanced	756	7156	7356	7456	856	8156	8356	8456	656	6156	6356	6456
Ideal Russell LifePoints® Balanced Growth	757	7157	7357	7457	857	8157	8357	8457	657	6157	6357	6457
Ideal Russell LifePoints® Long-Term Growth	758	7158	7358	7458	858	8158	8358	8458	-	-	-	-
Ideal FT Quotential Diversified Income	759	7159	7359	7459	859	8159	8359	8459	659	6159	6359	6459
Ideal FT Quotential Balanced Income	760	7160	7360	7460	860	8160	8360	8460	660	6160	6360	6460
Ideal FT Quotential Balanced Growth	761	7161	7361	7461	861	8161	8361	8461	661	6161	6361	6461
Ideal FT Quotential Global Balanced	762	7162	7362	7462	862	8162	8362	8462	662	6162	6362	6462
Ideal FT Quotential Growth	763	7163	7363	7463	863	8163	8363	8463	-	-	-	-
Ideal Dynamic Moderate Bundle	767	7167	7367	7467	867	8167	8367	8467	-	-	-	-
Ideal Dynamic Aggressive Bundle	768	7168	7368	7468	868	8168	8368	8468	-	-	-	-
Ideal DynamicEdge Balanced Growth	769	7169	7369	7469	869	8169	8369	8469	-	-	-	-
Ideal Meritas Income & Growth	770	7170	7370	7470	870	8170	8370	8470	-	-	-	-
Ideal Meritas Balanced	771	7171	7371	7471	871	8171	8371	8471	-	-	-	-
Ideal Meritas Growth & Income	772	7172	7372	7472	872	8172	8372	8472	-	-	-	-

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New plan or Additional premiums Contract no. _____

1 Planholder Information (The Planholder is also the Annuitant of the Contract)

Last name		First name		Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	Language <input type="checkbox"/> English <input type="checkbox"/> French
Street address				City	
Province				Postal code	
Tel. (Res.)	Tel. (Bus.)	S.I.N.		Date of birth (DD-MM-YYYY)	
Nature of principal business or occupation (If retired, please provide former occupation.)					

2 Identity Verification of Planholder

Type of document: Driver's license Passport Birth certificate Other (please specify)

Document number	Place of issue
Legal name on document	Province of registration

3 Successor Planholder (Only a spouse can be designated as Successor Planholder)

Last name		First name		Gender <input type="checkbox"/> Male <input type="checkbox"/> Female
Date of birth (DD-MM-YYYY)	S.I.N.	Tel. (Res.)	Tel. (Bus.)	

4 Beneficiary Information

Planholder's Estate OR Last name First name Relationship

If the Successor Planholder predeceases the Planholder, the designated Beneficiary, if still living at the death of the Planholder, will receive the Death Benefit Guarantee.

If you are using this form for additional premiums and you are designating a Beneficiary in this section, please note:

- If the existing Beneficiary of the Contract is **revocable**, the existing Beneficiary will be revoked and the new Beneficiary named here will be the sole Beneficiary of the Contract.
- If the existing Beneficiary of the Contract is **irrevocable**, the consent of the existing Beneficiary is required prior to making a change to the beneficiary designation.

If this application is signed by an individual who has been granted power of attorney by the Planholder, a beneficiary designation is only valid in certain circumstances. Consult your legal advisor. **In Quebec**, the designation of a Spouse as Beneficiary is irrevocable unless otherwise indicated. **Please initial in the box to the right if you wish the designation of your Spouse to be revocable.** The definition of the word "Spouse" in relation to beneficiary designation includes spouse by marriage and spouse by civil union. It does not include common-law spouse.

5 Series Information

Please indicate which series you are investing in Ideal 75/100 Series Ideal 100/100 Series Ideal Income Series

6 Series Maturity Date

The default Series Maturity Date for the Ideal 75/100 Series and the Ideal 100/100 Series is the Annuitant's 100th birthday. The Series Maturity Date for the Ideal Income Series is December 31st of the year the Annuitant turns 100 years of age.

If you wish to specify an alternative date, indicate the date here: _____ (DD-MM-YYYY) for Ideal 75/100 Series.
 _____ (DD-MM-YYYY) for Ideal 100/100 Series.

Please note the date you select must be a minimum of 10 years for the Ideal 75/100 Series and 15 years for the Ideal 100/100 Series from the date of your first premium payment or last reset.

7 Premium Payment Information and Allocation Instructions

Please make all cheques payable to The Standard Life Assurance Company of Canada (Lump sum premiums cannot be withdrawn via EFT).

Is this a Standard Life employee plan? Yes No

Source of Funds: Cheque Internal Transfer _____ Transfer from another financial institution _____

Premium allocation option		Premium payment	Pre-authorized debit (PAD) plan*	Dollar cost averaging*		Systematic withdrawal plan (SWP)**†
Ideal Segregated Fund name	Series Fund no.	Amount (\$) or Percent (%) <input type="checkbox"/> \$ <input type="checkbox"/> %	Amount (\$)	Amount		Amount (\$) or Percent (%) <input type="checkbox"/> \$ <input type="checkbox"/> %
				From Fund (\$)	To Fund (\$)	
Total		\$/100%	\$	\$	\$	\$/100%

* Please complete section 9.
 † If you have not indicated the order of Funds from which your SWP is to be withdrawn, income payments will be withdrawn from the Funds in accordance with the Standard Life Default Schedule.

8 Life Income Date (LID) (For the Ideal Income Series only)

Please indicate your Life Income Date: _____ (DD-MM-YYYY)

If no date is selected, the default Life Income Date will be the Annuitant's 65th birthday. If the Annuitant (or younger spouse or common-law partner, if Joint Life) is older than the default LID minimum age requirement and did not elect an LID on the application, then the default LID will be one year after the initial premium.

9 Pre-authorized Debit Plan (PAD), Dollar Cost Averaging or Systematic Withdrawal Plan (SWP)

Frequency: Weekly Every two weeks Monthly Every two months Quarterly Semi-annually Annually

PAD: First draw date (DD-MM-YYYY)

Regular draw date (DD-MM-YYYY)

Dollar Cost Averaging: Start date (DD-MM-YYYY)

End date (DD-MM-YYYY) (if applicable)

SWP: Payment date (DD-MM-YYYY)

Payment method: Direct deposit Mail* to Planholder's address

*Standard Life reserves the right to stop issuing cheques and offer direct deposit only.

10 Banking Information (Please provide a personalized void cheque OR stamped confirmation from the bank. Only required for PAD agreements and SWPs)

Name of financial institution

Transit number

Bank code

Account number

11 Advisor Information

Advisor name (please print)

Advisor code

Distributor cross-reference no.

Tel.

Fax number

E-mail address

Distributor (e.g. GA) name

Distributor code

% split (for split commissions)

12 Authorization and Signature*

- I declare that the statements and answers in this application are true and I agree that this application and declaration as well as the Ideal Segregated Funds - Signature Series Contract for Tax-free Savings Account shall be the basis of the contract between Standard Life and me. I have received the complete application form.
- I acknowledge receipt of the Standard Life *Ideal Segregated Funds - Signature Series Information Folder*, including the Ideal Segregated Funds – Signature Series Fund Facts and the Ideal Segregated Funds – Signature Series Contract for a Tax-free Savings Account, and I understand that some benefits provided in respect of premiums allocated to an Ideal Segregated Fund are **not guaranteed** and will fluctuate with the market value of the assets of the Fund.
- I have asked Standard Life to file an election with the Minister of National Revenue to register the Contract as a Tax-free Savings Account under section 146.2 of the *Income Tax Act* (Canada) and any applicable provincial income tax legislation.
- In the event that I become a non-resident of Canada, I will advise Standard Life in writing.
- By providing direct deposit information, I authorize Standard Life to deposit scheduled payments due from this Contract into the bank account indicated on the personalized void cheque or stamped confirmation from the bank. Standard Life will have no further liability with respect to these payments.
- If I have indicated on the application that I want to pay regular premiums using a PAD plan, I authorize the bank or other financial institution I have named to honor my instructions.
- I authorize The Standard Life Assurance Company of Canada or any of its affiliated companies to disclose personal information to other financial institutions, my advisor, my authorized dealer and any other third parties, when necessary, for administrative or processing purposes.

By signing below, you confirm your agreement with the above statements.

Planholder

Date (DD-MM-YYYY)

Province of signature

* If this section is incomplete, the application will be rejected.

13 Advisor Declaration and Signature

By signing below, I am confirming that:

- I have completed this application form with the Planholder and hold a valid life insurance license in the jurisdiction where the application was signed.
- To the best of my knowledge, the information supplied within this application is accurate.
- I have disclosed the following information to the Planholder: the company or companies I represent; that I receive compensation (such as commissions or a salary) for the sale of life and health insurance company products; that I may receive additional compensation in the form of bonuses, conference programs or other incentives; and any conflict of interest I may have with respect to this transaction.

Advisor signature

Date (DD-MM-YYYY)

14 Notice to Planholder

The transaction represented by this application is between the Planholder and Standard Life. The person soliciting this application is an independent contractor and will receive compensation from Standard Life upon the completion of this transaction. As a result of this application, the person soliciting this application may be eligible for non-monetary benefits depending on the volume of business that she/he places with the company during a given time period. The Planholder is not obligated to transact any other business with Standard Life as a condition of this transaction.

Standard Life will establish a financial services file for insurance, annuity, credit and related services in which information concerning your application for insurance will be placed, as well as information concerning any insurance claim. Only advisors associated with this contract, employees or individuals responsible for underwriting, investigation, administration and claims, or any person whom you authorize, will have access to this file.

Your file will be kept in the Standard Life office. You are entitled to consult the personal information contained in your file and, if applicable to have it rectified by sending a written request to the following address:

Ombudsman

The Standard Life Assurance Company of Canada

1245 Sherbrooke West

Montréal, Quebec H3G 1G3

Find out more

**The Standard Life Assurance Company of Canada
Retail Investment Customer Services**

**1245 Sherbrooke Street West, Suite 1200
Montréal, Quebec H3G 1G3**

**P.O. Box 11497, Stn Centre-Ville,
Montréal, Quebec H3C 5S5**

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