

Direct deposit enrolment form

Return completed form to:
Sun Life Financial, Group Retirement Services
PO Box 11001 Stn CV, Montreal QC H3C 3P3

Please PRINT clearly.

Nota : La version française de ce document est également disponible.

Plan and personal information

Name of plan sponsor										Client ID	
The Trustees for the UBC Faculty Pension Plan / University of British Columbia										C0KHL	
First name				Middle initial		Last name					
Social Insurance Number*				Account number				Telephone number (day)			
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Email address								Telephone number (evening)			
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*Your Social Insurance Number is used for administrative purposes so that information on this form is applied to your account.

Select all products that apply.

☐ FPP ☐ RRIF-type payments ☐ LIF-type payments ☐ VPLA ☐ Supplemental Arrangement

Action Required

For your protection and security, Sun Life Financial Group Retirement Services will require a voided cheque to process Electronic Fund Transfer (EFT) transactions with your Canadian banking institution.

If your name is not pre-printed on the cheque, or you do not have a voided cheque, please provide proof of account ownership from your bank. Proof of ownership must:

- include your name
- be provided on banking institution letterhead or form
- be stamped by the banking institution

To provide us with your banking information, please mail us an original voided cheque. Please follow these steps:

- Place your voided cheque here >>>>
- TAPE the cheque along the side edge.
- Mail the completed form back to us at the address indicated at the top of this form.

Paid

First Last Name
Street Address
City, Province
Postal Code

Institution Name
Institution Address

Pay to the order of _____ \$ / 100 DOLLARS

#000

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Respecting your privacy

Our Purpose is to help our Clients achieve lifetime financial security and live healthier lives. We collect, use and disclose your personal information to: develop and deliver the right products and services; enhance your experience and manage our business operations; perform underwriting, administration and claims adjudication; protect against fraud, errors or misrepresentations; tell you about other products and services; and meet legal and security obligations. We collect it directly from you, when you use our products and services, and from other sources. We keep your information confidential and only as long as needed. People who may access it include our employees, distribution partners such as advisors, service providers, reinsurers, or anyone else you authorize. At times, unless we're prohibited, they may be outside your jurisdiction and your information may be subject to local laws. You can always ask for your information and to correct it if needed. In most cases, you have a right to withdraw your consent, but we may not be able to provide the requested product or service. Read our Global Privacy Statement and local policy at www.sunlife.ca/privacy or call us for a copy.

Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life group of companies.