

# SunFlex Retirement Income

## Performance-linked investments change request for former Flexible Income Plan (FIP) clients



### A Policyholder information

Policyholder first name	Last name	Policy # RP -
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### B Performance-linked investment changes

*This request replaces the previous Performance-linked investments and percentage selections.*

Indicate the percentage of income you wish to have allocated to each Performance-linked investment(s) beside the name of the applicable Performance-linked investment.

Performance-linked investment	Allocation (%)
Sun Life Managed Conservative Portfolio	%
Sun Life Managed Moderate Portfolio	%
Sun Life Managed Balanced Portfolio	%
Sun Life Managed Balanced Growth Portfolio	%
Sun Life Managed Growth Portfolio	%
Sun Life BlackRock Canadian Balanced Fund	%
Fidelity Canadian Asset Allocation Fund	%
Mackenzie Ivy Growth and Income Fund	%
Trimark Income Growth Fund	%
SunFlex Sun Life MFS McLean Budden Canadian Equity Bundle	%
SunFlex CI Signature Select Canadian Bundle	%
SunFlex CI Canadian Investment Bundle	%
SunFlex Invesco Select Canadian Bundle	%
SunFlex RBC Canadian Dividend Bundle	%
SunFlex Sun Life MFS McLean Budden US Equity Bundle	%
SunFlex Sun Life MFS McLean Budden Global Equity Bundle	%
Sun Life BlackRock Canadian Universe Bond Fund	
Sun Life BlackRock Canadian Composite Equity Fund	
TD U.S. Index Fund	
TD International Index Fund	
<b>TOTAL</b>	<b>100%*</b>

- You may select up to ten different performance-linked investments.
- The smallest percentage you may allocate to each performance-linked investment is 1%.

\*The total percentage of all selected performance-linked investments must equal 100%. Each percentage selected must be a full percentage, e.g., we will not accept 33.3%.

We will process your request using the values of the performance-linked investments that are available at the end of the business day we receive it.

**C Authorization and signature**

Signature of policyholder X			Date (dd-mm-yyyy) _ _	
Location signed (city)		Location signed (province)		
Advisor first name	Advisor last name	Advisor no./rep code	Advisor signature X	

Please submit this signed, fully completed request to us at 227 King Street South, Waterloo, Ontario N2J 4C5.