FaithLife FINANCIAL

Contribution/Transfer Request Form for FORTRESS Funds

Annuitant's Name: _____ Policy No.:_____

SECTION A – SOURCE OF FUNDS

☐ Additional Contribution of $ _____ to this policy (cheque attached)

☐ Transfer from policy number _____

$ _____ from the Daily Interest Account

$ _____ from the Guaranteed Interest Account due _____ for $ _____

NOTE: PAC will automatically be discontinued if entire value is transferred, unless otherwise indicated.

SECTION B – INVESTMENT DETAILS – Segregated Funds Option *(Please state per cent of contribution to be allocated)*

☐ Allocate payment above ☐ Change monthly PAC allocation ☐ Change Income Payment allocation

_____ %	Canadian Equity (Core)	_____ %	Enhanced Dividend
_____ %	Canadian Equity (Growth)	_____ %	Balanced (Laketon)
_____ %	Canadian Equity (Value)	_____ %	Balanced (McLean Budden)
_____ %	Canadian Small Cap Equity	_____ %	Canadian Bond
_____ %	Asia Pacific Equity	_____ %	Global Bond
_____ %	European Equity	_____ %	Money Market
_____ %	Global Equity	100 %	Total

SECTION C – FUND TRANSFER DETAILS *(Only for transfer from one fund to another for this policy)*

I request units to be transferred as follows: *(please state per cent of fund)*

NOTE: If income payments are being made from this policy, also complete Section B, "Change Income Payment allocation".

FROM (Fund Name)	%		**TO** (Fund Name)	%
				100%

Total _____

I understand that:

1. The contribution and/or transfer will take place on the date this form is received at FaithLife Financial's Administrative Office.
2. If a fund transfer results in any one fund having a value less than $500, the remaining value will also be transferred in the same proportions.

Owner's Signature:_____ Date: _____

District Representative's Name _____ DR No. _____

Open Territory ☐

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