

INSTRUCTIONS FOR SYSTEMATIC EXCHANGE PROGRAM

	DEALER INFORI																						
	Advisor Name Dealer Name										Dealer phone number												
											Dealer Code			Advisor Code									
1.	ACCOUNT TYPE																						
	New Account	sting Accour	Account RGP Investments Account #					I			er Accoi	unt#											
2.	CLIENT/ANNUIT	FORMAT	ON				L	anguage Pref	rence (If no languag	Ce (If no language preference is indicated, English				ish will be selected.)					General French				
	Please check one		🗅 Mr.		(🖵 Mrs.			Ms.	🖵 Dr.		Occupa	ation										
	Last Name								First Name														
	Social Insurance Numbe							Date of Birth						day month				year					
	Address																						
	City / Province											Postal Code											
	Home Phone			Employer Phone																			
	Email Address																						
3.	SYSTEMATIC EX	CHANG	E PROG	RAM	- for	autom	natic e	exchan	ges allowed	between inves	tmen	its											
	Transfer from one fu	er fund withi	nd within the same account						rring funds from a	one ac	count to	another											
	From account #									t #													
	Frequency - check on box only:	🖵 Eve	ry two month						ally 🖵 Annually	Monthly Annually													
	Commencement Date	: M	MMN	1 D	D	Y	Y	Y	(if applica	ate of the montl ple):	ו D		End date (if applicable):	M	MN				Y	Y	Y	Y
	Note: The automatic ex	ote: The automatic exchange program will automatically terminate when the original fund balance is less than the requested transfer amount.																					
		Funds																					
	From Fund Cod		From Fund Name									To F	Fund Name					Amount					
		-			n Fund	uname	•		То	Fund Code			101	und Nam	e					Am	ount		
					n Fund		•		То	Fund Code			101	und Nam	e					Am	ount		
		5			n Fund		•		То	Fund Code				und Nam						Am	ount		_
					n Fund		•		То	Fund Code				und Nam	le					Am	ount		
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4	Important information Activation of the System exchange or transfer da	n: natic Excha	nge Progran					days no			natic E	xchange				ess da	ys no	otice p	prior				
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SEND THE ORIGINAL OF YOUR DULY SIGNED APPLICATION TO :

RGP Investments Funds Attn : ACCT ADMIN °/₀ CIBC Mellon 1 York Street, Suite 900 Toronto, ON M5J 0B6 Canada

OR FAX YOUR REQUEST TO CIBC MELLON

416 643-3616 or toll free : 1 855 884-0493 RKaccountadmin@cibcmellon.com

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