



## 6. RIF/LIF/RLIF/LRIF/PRIF Plan Payment Details

The payment date must be between the 1st and the 25th of any month.

If the RIF/PRIF plan contains G5|20 Funds, please use the G5|20 RIF Plan Payment Form.

Frequency: \_\_\_\_\_ Start Date (MM/DD/YYYY): \_\_\_\_\_

M = Monthly BM = Bi-Monthly (Every 2 months) Q = Quarterly SA = Semi-Annually A = Annually

From Fund Code	To Fund Code	Amount
		\$ %
		\$ %
		\$ %
		\$ %

If no date is specified, CI will pay out the RIF/LRIF/PRIF/LIF/RLIF minimum during the month of December.

The minimum annual amount (Payments will begin in the first full calendar year following the initial investment)

The maximum annual amount (for LRIF, LIF and RLIF Plans only)

Amount of \$ \_\_\_\_\_ for each payment Gross OR Net of fees and withholding taxes

Withholding Tax: Default OR Custom Rate of: \_\_\_\_\_ (please indicate a whole number which meets legislative minimums)

Election of payment based on Spouse's age: I elect that the payment under the RIF be calculated using the age of my spouse.

Election of Spouse as Successor Annuitant: (RIFs only): Where permitted by law, I hereby elect that my spouse become the annuitant under the RIF in the event of my death before the termination of the RIF, if he or she survives me. I reserve the right to revoke this election as permitted by applicable law.

\_\_\_\_\_  
First Name

\_\_\_\_\_  
Middle Initial

\_\_\_\_\_  
Last Name

**Note:** Where I have elected to base the RIF minimum payment on my spouse's age, I understand this election may not be changed after the end of the year in which the application is made, even in the event of my spouse's death or change of our marital status.

## 7. Authorization

I confirm that all other terms and conditions of the contract will remain the same, including the beneficiary designation. I request that CI Investments Inc. convert the contract to, and register the contract as a Retirement Income Fund (RIF), Life Income Fund (LIF), Locked-in Retirement Fund (LRIF), Restricted Life Income Fund (RLIF) or Prescribed Retirement Income Fund (PRIF), as applicable, under the provisions of the Income Tax Act (Canada) and, if applicable, under any provincial pension legislation. I understand the contract will be subject to the provisions of said legislation. I declare that I am the owner of the contract. I understand that as a consequence of registering the contract as a RIF or a LIF, the contract provides that an income will become payable there under, commencing not later than the last day of the first calendar year following the calendar year in which the conversion to a RIF or LIF, as applicable, becomes effective.

X  
\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date (MM/DD/YYYY)

\_\_\_\_\_  
Advisor Name

\_\_\_\_\_  
Dealer/Advisor Code

X  
\_\_\_\_\_  
Advisor Signature

\_\_\_\_\_  
Date (MM/DD/YYYY)

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